Customer Management Basics:

The HIPAA Security/Privacy Rule: The HIPAA Security/Privacy Rule provides state and federal protections for individually identifiable health information held by covered entities and their business associates and gives patients an array of rights with respect to that information. At the same time, the Privacy Rule is balanced so that it permits the disclosure of health information needed for patient care and other important purposes.

Processes for the protection of patient information will be under the exclusive control of management. Adherence to these processes will be audited/review by management for operational compliance. All employees should be trained on HIPAA in order to maintain the integrity of patient records.

The company will utilize integrated patient and inventory records in Adilas. The system offers the ability for users to edit individual records by staff and update information in the database. The database includes search and add features that minimize the risk of duplicate patient record creation. The system allows a user to view/edit/update/delete records, depending on permissions and supports data entry quality checks through various methodologies at the front end. The system maintains a user history in order to ensure transparent change to patient records.

Search or Queue a Customer.

Use the quick search to create a new or search for a customer by name.

The *MMJ Dispensary Home Page* will alert reception to relevant information such as the customer's required date of birth and how many customer's are ahead of them in the *queue*.

1. Place cursor in Swipe DL or search customer name or id field

| select | Go - Home | Chooser Favorites Logout Print Help Back | |
|--------|--------------------------------------|---|--|
| | Swipe DL Clear | 21 Born On 12/14/94 Customer Name or Id: Go Search add new - blank form | |
| | Quick Buttons | Patient Queue (0) | |
| | Timecard Status: nextchapter None | Customer Customer Type Started By Start Time Age Type Action Done By | |
| | Clock In/Out | | |
| | My Cart Favorites | | |
| | Customer Logs | | |
| | Invoice Homepage | | |
| | Inventory Homepage | | |
| | Cultivation Homepage | | |
| | MMJ Operations Page | | |
| | Sales Reports | | |
| | Closing Report | | |
| | Metrc Homepage | | |
| | Classic Homepage | | |
| | | | |

2. Scan the patients Drivers License or cannabis card or type the customer name into the name or id field.

3. Select customer to add customer to queue.



From here, you can press the logo to return to your home screen, start a new cart or remove the patient from the queue.

Edit a Customer.

| A Video for these instructions i | is available. |
|----------------------------------|---------------|
|----------------------------------|---------------|

| Search for the customer by name and/or ID Number in the |
|---|
| quick search |
| From the MMJ Dispensary or Rec Homepage: |

| Customer | ŧ | bob | Go |
|----------|---|-----|----|
|----------|---|-----|----|

| 1. | Enter the customer name in | Customer Name or Id: bob | Go Search | the |
|----|----------------------------|--------------------------|-----------|-----|
| | quick search and select GO | | | or |
| | Search. | | | |

0r

2. Place cursor in Swipe DL or Patient License Name or Id Field and Scan the customers Drivers License or ID card or type the customer name into the name or id field.

3. Select edit on the customer record you wish to edit.

| | | | | | | Search Returned 2 C | ustomer/Con | tacts | | | |
|-----------|-------------|--|--------------------------------|--------------------|--------------|---------------------------------|----------------|-------------------|---------------------------|----------------------------------|---|
| os/Conten | t Last Name | First Name Business Name | 5426 Fast Highlands Way | City Scottsdale | State Zip | Type 341 03 Patient Caregive | Customer le | D9632528741 | ID Expiration Date | Status Links | dit] [history] [queue] [new time] [new cart |
| | Caregiver | B 1 | 1224 Last Inginands Way | , Scoustaic | 17 043 | | 507021 | D 420 420000 | 10/3//10 | | The second |
| | Marley | Bob | 1234 Jamaica Lane | Jamaica | AZ 843 | .02 Member Patient | 507921 | D420420999 | 12/1/16 | Active [log] [pmts] [pmt nist] [| editj [history] [queue] [new time] [new cart |
| | | | | | | | | | | | |
| | | Quick Tip: 9 Yo | u can also drill | into the | e custo | omers name f | rom a c | art or inv | voice | | |
| | | | | | 7 4 | Edit quete | mon | data | | | |
| | | C | ustomer Info | | 4. | | iner o | uata | | | |
| | | Name: [change] | Bob Marley [lo | g] [label |] 5. | Select ear | t cust | omer. | | | _ |
| | | Address: | 1234 Jamaica L | ane | *(| or select ed | it flex | grid to | edit addi | tional custome | r data. See |
| | | City State 9 7 | . I | 200 | <u>a</u> | <u>ld/edit cus</u> | tomer | flex-gr | <u>id.</u> | | |
| | | City, State & Zij | 5: Jamaica, AZ 84 | 399 | | | | | | | |
| | | Phone: | 4804204201 | | | | | | | | |
| | | MMJ ID#: | D420420999 | | | | | | | | |
| | | | | | | | | | | | |
| | | Note: / You are | editing when t | ne ia in | alcate | es a # you are | adding | when it s | ays word i | new | |
| | | | | | | | | | | | |
| | | | photo/scans (1) | media/cont | ent (0) c | ustomer loa customer | homepage | ¢- | | | |
| | | | | | | | | | | | |
| | | This is the customer add/edit the help file for more info. | page. Please fill in the infor | mation as mu | ich as poss | ible. If this is not the corr | ect customer, | please do a new | search. See | | |
| | | Custor | Id: 507921 | ant 10.00% | diagount A | * | | | | | |
| | | Busine | ess Name: | BIIL - 10.00% (| iiscourit 😜 | * (enter a busine | ss name or a f | irst/last name co | mbo) | | |
| | | | Or | | | | | | ć | | |
| | | L | ast Name: Marley | * (er | ter a busin | ess name or a first/last na | me combo) | | | | |
| | | Fi | Address: 1224 Jameire Len | * (er | iter a busin | ess name or a first/last na | me combo) | | | | |
| | | A | Address 2: | e | | (po boxes go her | e) | | | | |
| | | | City: Jamaica | searc | h cities, st | ate, county | -) | | | | |
| | | | | | | | | | | | |
| | | | | | [add an | additional contact | address | | | | |
| | | | | stomer | | | | | | 1 | |
| | | | edit et | ISTOLLEI | | | | | | | |
| | | | | | | | | | | | |
| | | | | | Flex | k Grid Tie-In Result | is (1) | | T (M) A B | | |
| | | How did you hear | about us? Preterred | method c | Conta | Newsletter | vsietter W | ould you like | e ixt Msgs? Re | tation Date | |
| | | Social Mould | Lindli | | | 1 to woldton | 14 | 0 | De | | |

Adilas420 ¹ uCannDo Adilas Manual

Add a new Customer.

If the customer reports being new. Be sure to search for the customer by name and/or ID Number, by swiping the card, entering the name into the Customer Name or ID: or your in your Quick Search Fields. It is important to avoid duplicate entries.

| From the MM | Dispensary or | Rec Homepage: |
|-------------|---------------|----------------------|
|-------------|---------------|----------------------|

1. Enter the customer name where it says customer name or type the word "new" in the Customer Name field. Select GO or Search.

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2. Place cursor in Swipe DL or Patient License Name or Id Field and

Scan the patients Drivers License or MMR card or type the customer name into the name or id field.

| MMJ Dispensary Homepage | | |
|---|---|--|
| select Go - Home C | hooser Favorites Logout Print Heln Back | |
| | nooser (1 a forneo) - Degout (1 mill (1 help + Duck | |
| Scan here | 🕈 Search nam | he here |
| Swipe DL Clear | 21 Born On 12/14/94 Customer Name or Id: Tommy | Go Search add new - blank form |
| Outsk Buttons | Define Ourse (A) | |
| Quick Buttons | Patient Queue (0) | |
| None | Customer Customer Type Started By Start Time Age | Type Action Done By |
| Clock In/Out | | |
| My Cart Favorites | | |
| Customer Logs | | |
| Invoice Homepage | | |
| Inventory Homepage | | |
| Cultivation Homepage | | |
| MMJ Operations Page | | |
| Sales Reports | | |
| Closing Report | | |
| Metrc Homepage | | |
| Classic Homepage | | |
| lf the patient is not in the database: | Customer/Contact Search Results | tes Logout Print Help Back |
| 3 Select to Add New | "Rack [new customer search] [nationt queue] [custor | ner logs] [advanced customer search] [export customer list to ms excel] [printable customer list] |
| J. Select to Add New | [customer sales totals]. [quote homepage]. [invo | ice homepage]. [receivables homepage]. [elements of time homepage]. [new cart/invoice] |
| Customer: | _ | |
| | add | new customer - blank form |
| Note you are entering a | | Search Returned 0 Customer/Contacts |
| new natient as the ID. | | |
| new patient, as the ID. | | |
| indicates "new"· | | Ordele The 11 Commission and a second state to the |
| | | Quick Tip: 11 Scanning using a magnetic stripe or |
| | | 2D barcode reader for an ID can auto populate |
| | | manyfielda |
| Customer Type's: should | he defined by management | many neus. |
| <u>customer rype s.</u> snoutd | be defined by management. | |
| See Company Instruction | is for Customer Type's and | |
| See company mistraction | is for customer type s and | new patient/licensee search |
| Requirements | | |
| icquirements. | | This is the patient/licensee add/edit page. Please fill in the information as much as possible. If this is not the correct patient/licensee, please do a new search. See the help file for more info. |
| | | Id: new |
| | | Patient/Licensee Type: \checkmark select * |
| | | Member |
| | | Business Name Non-Member Vendor * (enter a business nam |
| | | Visitor * (see above - biz or first/last name) |

Last Name: Marley

* (see above - biz or first/last name)

| Quick Tip: 10 us | e the quick | search to |
|-------------------------|-------------|---------------|
| select customer, Go. | enter "nev | v" and select |
| Customer | \$ nev | w Go |

| 4. Fill in and/or confirm the general customer | | " | Back . [new customer search] | |
|--|--|---|---|--|
| information using the Customer Form. | This is the customer add/edit page. Please fill in the information as much as possible. If this is not the correct customer, please do a new search. See the help file for more info. | | | |
| | Id: | new | | |
| All information can should be entered as non- | Customer Type: | select | \$ | |
| required fields can be hidden under administrative | Business Name: | ✓ select Member Patient | * (enter a business name or a first/last name combo) | |
| permissions for Customer Set Up. Instructions for | First Name: | Other Licensee | (see above - biz or first/last name) | |
| turning off fields can be found in the <u>Set Up</u> | Last Name: | Visitor | (see above - biz or first/last name) | |
| Customer Required Information manual or video. | Address: | | (physical street address) | |
| | Address 2: | | (po boxes go here) | |
| A * indicatos a required field | City: | | search cities, state, county | |
| A maicates a requirea jieia. | County: | | | |
| | State: | select | 0 | |
| Users can enter n/a in some fields if they are not | Zip: | * or | International Zip: | |
| applicable. The expiration date will alert to | Home Phone: | | | |
| expiring registration or licenses. | Cell Phone: | | (does not print on invoice) | |
| | Work Phone: | | | |
| Poviow all fields for accuracy of data | Fax: | | | |
| Review all fields for accuracy of data. | Email: | | | |
| | Web Address: | | | |
| 5. Select add customer or <u>Add</u> | Marketing Contact Opt In: | Email Contact (c Text Message Co | checked means you may be contacted via email) ontact (checked means you may be contacted via text) | |
| <u>Customers additional contact</u> | Customer Start Date: | 12/14/15 * (us | se the m/d/yy format for all dates) | |
| information | Customer End Date: | N/A (opt | ional - set to n/a if not applicable) | |
| | ID Issue Date: | N/A (opti | ional - set to n/a if not applicable) | |
| | | | | |
| General Notes: | | | | |

| General Notes: | | | |
|----------------|--------------|---------------------------------------|--------------------------|
| | | | |
| | | 1. | |
| | add customer | (there is also a submit button at the | very bottom of the page) |

6. Upload customer images and documents. See Uploading images & documents.