

## 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

### 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.

Check Required Customer / Member Forms here!

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 is available.

Search for the customer by name and/or ID Number in the quick search

From the [MMJ Dispensary](#) or [Rec Homepage](#):

1. Enter the customer name in quick search and select GO Search.  the or

Or

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 Customer/Contacts												
os/Content	Last Name	First Name	Business Name	Address	City	State	Zip	Type	Customer Id	MMJ ID#	ID Expiration Date	Status Links
	Caregiver	Bob		5426 East Highlands Way	Scottsdale	AZ	87541	.03 Patient Caregiver	506809	D9632528741	10/31/16	Active [log] [pmts] [pmt hist] [edit] [history] [queue] [new time] [new cart]
	Marley	Bob		1234 Jamaica Lane	Jamaica	AZ	84399	.02 Member Patient	507921	D420420999	12/1/16	Active [log] [pmts] [pmt hist] [edit] [history] [queue] [new time] [new cart]

**Quick Tip: 9** You can also drill into the customers name from a cart or invoice

**Customer Info**

Name: [change] Bob Marley [log] [label]

Address: 1234 Jamaica Lane

City, State & Zip: Jamaica, AZ 84399

Phone: 4804204201

MMJ ID#: D420420999

## 4. Edit customer data

## 5. Select edit customer.

\*or select edit flex grid to edit additional customer data. See [add/edit customer flex-grid](#).

**Note: 7** You are editing when the id indicates a # you are adding when it says word "new"

photo/scans (1)
 media/content (0)
customer log
customer homepage

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: 507921

Customer Type: .02 Member Patient - 10.00% discount \*

Business Name:  \* (enter a business name or a first/last name combo)

Or

Last Name:  Marley \* (enter a business name or a first/last name combo)

First Name:  Bob \* (enter a business name or a first/last name combo)

Address:  1234 Jamaica Lane (physical street address)

Address 2:  (po boxes go here)

City:  Jamaica search cities, state, county

[add an additional contact/address]

**Flex Grid Tie-In Results (1)**

How did you hear about us?	Preferred Method of Contact	Promotions/Newsletter	Would you like Txt Msgs?	Relation	Date
Social Media	Email	Newsletter	No	Detail	4/7/16 [edit]

## 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.

**Quick Tip: 10** use the quick search to select customer, enter "new" and select Go.

From the MMJ 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.
- Or
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.

If the patient is not in the database:

### 3. Select to Add New Customer:

Note you are entering a new patient, as the ID: indicates "new":

Customer Type's: should be defined by management. See Company Instructions for Customer Type's and Requirements.

**Quick Tip: 11** Scanning using a magnetic stripe or 2D barcode reader for an ID can auto populate many fields.

#### 4. Fill in and/or confirm the general customer information using the Customer Form.

All information can should be entered as non-required fields can be hidden under administrative permissions for Customer Set Up. Instructions for turning off fields can be found in the Set Up Customer Required Information manual or video.

A \* indicates a required field.

Users can enter n/a in some fields if they are not applicable. The expiration date will alert to expiring registration or licenses.

Review all fields for accuracy of data.

#### 5. Select add customer or Add Customers additional contact information.

General Notes:

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.

« Back . [new customer search]

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

Customer Type:  \*

Business Name:  \* (enter a business name or a first/last name combo)

Member Patient  
Non Member Patient  
Other Licensee  
Patient Caregiver  
Visitor

First Name:  (see above - biz or first/last name)

Last Name:  (see above - biz or first/last name)

Address:  (physical street address)

Address 2:  (po boxes go here)

City:  search cities, state, county

County:

State:

Zip:  \* or International Zip:

Home Phone:

Cell Phone:  (does not print on invoice)

Work Phone:

Fax:

Email:

Web Address:

Marketing Contact Opt In:  Email Contact (checked means you may be contacted via email)  
 Text Message Contact (checked means you may be contacted via text)

Customer Start Date:  \* (use the m/d/yy format for all dates)

Customer End Date:  (optional - set to n/a if not applicable)

ID Issue Date:  (optional - set to n/a if not applicable)