Welcome to the Personal Hormones Comprehensive BHRT Program.

This document serves as a road-map to all of the features of both the Personal Hormones Personal Health Center for Patients and the Personal Hormones Practice Management Center for Providers.

This document is not intended to be a substitute for one on one coaching, which is the true foundation of the program. However, we hope that you will take some time to review this road-map, which gives a broad overview of the capabilities of the program and the terminology employed within it. By familiarizing yourself with this material, you will gain much more advantage from your coaching sessions, which will have you up and running all the more quickly!

Please also bear in mind that you are under no obligation to use every single feature of the technology that is presented here. You can certainly pick and choose those features and modules that you believe will add the most value to your practice at any given point in time.

If you have any questions, just give us a call or contact us at:

support@personalhormones.com

Sincerely,

The Personal Hormones Team

The On-Line Patient Portal

You've got some interested patients! What's the next step?

The next step is to have your patients go to your personalized BHRT Information Center on the Internet and create a Sign-In Account. When they create a Sign-In Account through your personalized BHRT Information Center Page, they are automatically "linked" to your Practice.

How do my patients find my BHRT Information Center page on the Internet?

1. If you have a web site of your own, we can work with your web developer who will put a link from your site to your Personalized BHRT Information Center page.

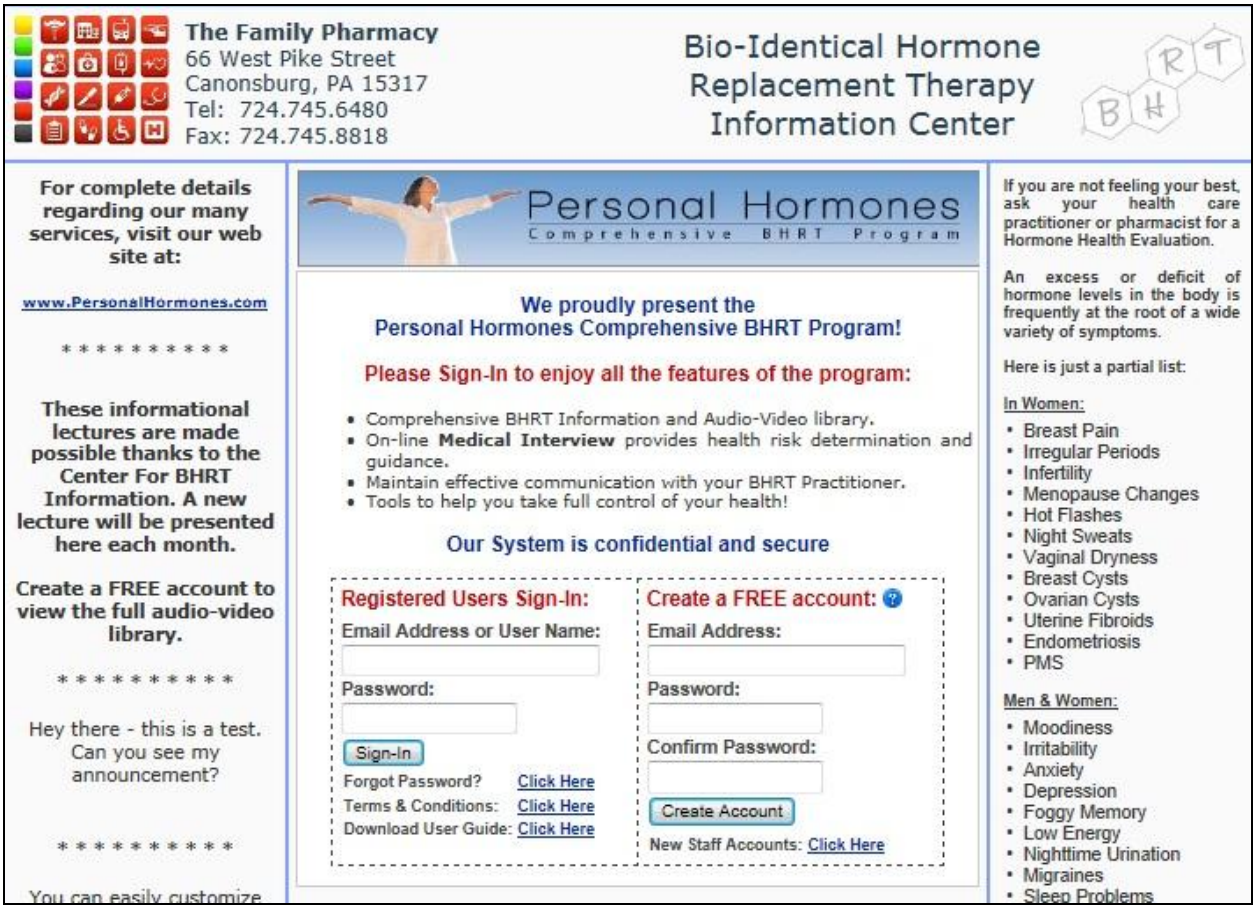
2. If you don't have a web site then we can help you purchase an Internet Domain Name (aka: Web Address) and your Personalized BHRT Information Center page can become your web site!

3. If your Web Address is www.mywebsite.com then we can help you create a Sub-Address called bhrt.mywebsite.com which leads directly to your Personalized BHRT Information Center page.

Note: Your marketing posters, flyers, stuffers and fact sheets will have your Web Address printed on them, making it easy for your customers to find your BHRT Information Center page.

What does my BHRT Information Center page look like?

This is approximately what people will see when they arrive at your personalized BHRT Information Center Web Page:

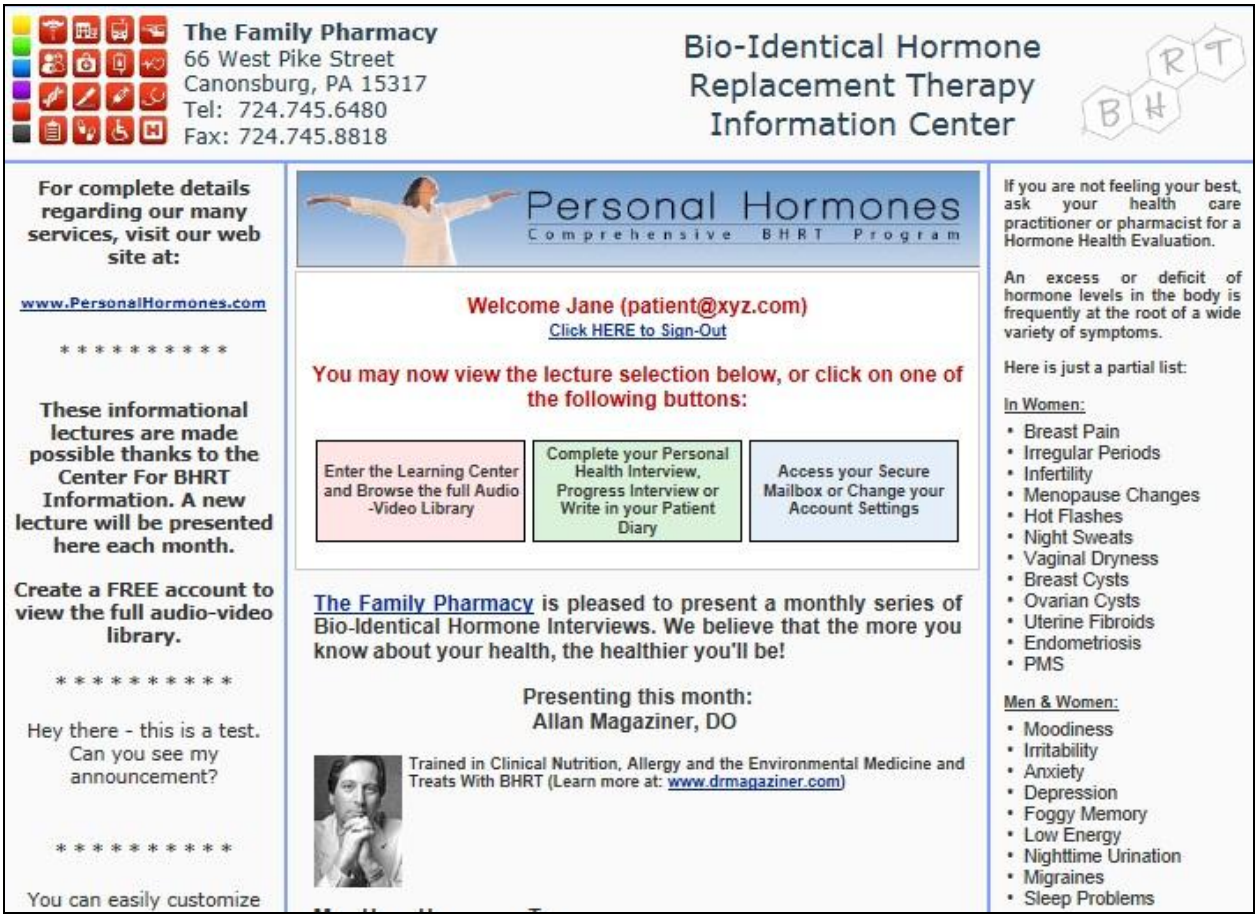


In the center of the page, your patients can sign-in by supplying a username and password, and then clicking the “Sign-In” button.

New patients create a free account by supplying an email address and desired password and then clicking the “Create Account” button.

When “Create Account” is clicked, we immediately send an activation email to the address that was specified. The activation email contains a link to our Terms and Conditions, and also a 6-digit activation code. To complete the account activation, the patient must provide the correct 6-digit activation code the first time that they Sign-In.

Once your patients successfully complete the one-time account activation process, they will Sign-In and see the following screen:



When the patient clicks on either the Pink, Green or Blue box, they can accomplish the following:

Pink Box:	Enter the Learning Center and Browse the full Audio-Video Library
Green Box:	Complete your Personal Health Interview, Progress Interview or Write in your Patient Diary
Blue Box:	Access your Secure Mailbox or Change your Account Settings

When either the Pink, Green or Blue box is clicked (see above), the patient will now see the following at the top of the screen:

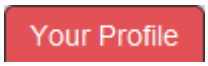
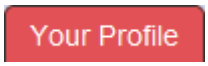
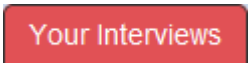
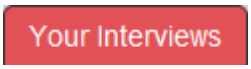
The most important of the Red Tabs running along the top of the screen are:

Your Profile, Your Interviews, Your Practitioner, Learning

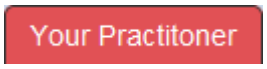
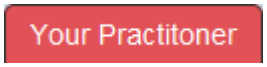
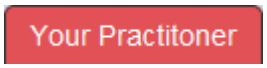
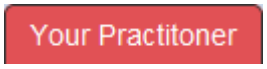
When any of these Red Tabs is clicked, the Patient is presented with a number of choices along the left-hand side of the screen.

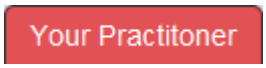
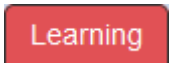
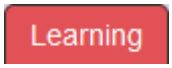
The following table describes the function and features of the different pages that the patient will encounter in the Patient Portal:

Your Profile **Welcome**	This screen displays a Welcome message, informs the Patient when they have unread messages in the Secure Mailbox, and reminds them to change their password frequently.
Your Profile **Your Secure Mailbox**	Messages can be sent between Patient and Practitioner via the on-line Portal. Rather than sending the message over regular email, the recipient receives an email alert stating that a message was left for them in the secure mailbox section of the On-Line portal. The recipient then signs-in to read and respond to the message.
Your Profile **Your Profile Data**	Shows the Patient name, address, phone numbers, gender, birth date, emergency contact information as entered by the Patient.

 **Change Profile Data**	Allows the Patient to update their name, address, phone numbers, gender, birth date and emergency contact information.
 **Change Your Password**	Allows the Patient to change the sign-in password. The Patient must supply the old password in order to make the change – this prevents an unauthorized party from changing the password if the Patient leaves the computer unattended.
 **About the Interviews**	General information that explains the process of completing the Medical Interview and Follow-Up Progress Interviews.
 **Interview Me!** The Comprehensive On-Line Medical Interview.	This is the starting point where the Patient reveals information regarding symptoms, medical history and lifestyle. Once a Patient begins the Interview, they have 30 days to complete it. They can return at any time in those 30 days to review the answers and make corrections. After 30 days, the Interview answers are locked so that we can preserve an accurate historical record of the Patient condition. The Patient can return in the future and begin a brand-new Interview at any time, for example if a significant amount of time has passed and/or some aspect of their health has changed significantly. Advantages of the On-Line Interview are: 1. Patient can complete in comfort of home 2. Asks questions appropriate to Age and Gender 3. Patient is asked to rate over 45 symptoms on a scale of 0 to 9, and to give information regarding personal and family medical conditions, gynecological history, personal and family cancer history, latest medical exams, hormone usage history, medications, allergies, diet, lifestyle, sleep habits and osteoporosis risk factors. 4. Answers are reported in a comprehensive and clear tabular report format. 5. A significant time saver for both Patient and Practitioner!

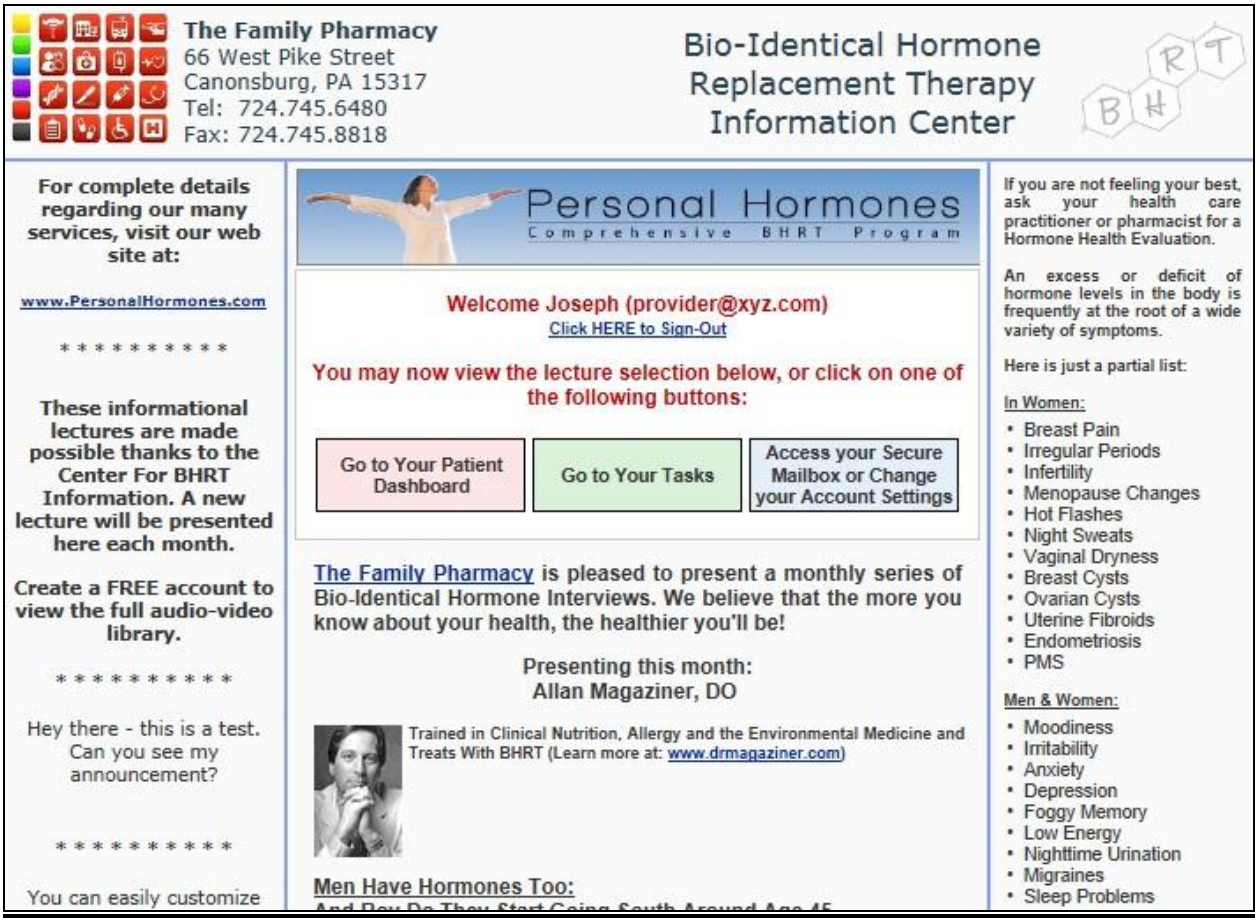
Your Interviews **Interview Me!** The Comprehensive On-Line Patient Interview.	Note: You may occasionally meet people who don't own a computer, don't know how to use a computer, don't have email, or otherwise find the On-Line Interview process to be too complicated. In that case, you can set up a time for a consultation and sit down with them to complete the Interview together. Once the Interview is completed, the patient is given options on the screen to either: 1. Make Changes to Interview Answers 2. Print a Summary Report of all Interview Answers in a comprehensive and clear tabular report format.
Your Interviews **My Patient Diary**	Patient can enter notes and comments into this running, on-line personal diary, as frequently as they please. When the Practitioner views his own notes, the Patient Diary entries are interleaved chronologically with the Practitioners own notes, thus giving a wider picture of the Patient's progress.
Your Interviews **My Progress & Trends**	Once the actual treatment has commenced, the Patient is encouraged to periodically (preferably at two-week intervals) fill out a small follow-up questionnaire. We take the top 10 most severe symptoms that were rated in the initial On-Line Medical Interview, and ask the Patient to rate the intensity of those symptoms on a scale of 0 to 9. The results are plotted out on a color chart that shows whether the trend is improving, deteriorating or remains the same. In order to get statistically meaningful data, the Patient must wait at least 14 days between each follow-up interview. Over time, you will be able to use this data to judge the efficacy of BHRT treatment across your entire population group!
Your Practitoner **My Practitioner**	Shows the Name, Address and Phone information of the Practice/Pharmacy and displays a staff photo (if one has been provided). A link says "Click HERE to send a Secure Message to your Practitioner". Clicking that link takes them to the Secure Mailbox page.

 **My Practitioner**	Occasionally, a patient will want to switch their account to a different Practitioner. This usually occurs when the Patient first creates an account via the web-site of a participating Pharmacy. The Pharmacy makes first contact with the Patient and then refers the Patient to a local BHRT Practitioner. At that time, the Patient will want to transfer their account from the Pharmacy to the Practitioner. In this event, the Patient can click "Need to switch to a different Practitioner? Click HERE". A window pops-up and the Patient will enter your Provider Code and then confirm that they wish to transfer to your account.
 **My Treatment Plans**	Here the Patient sees the detailed Treatment Protocols (Plans) that the Practitioner has crafted over time. A chronological history is preserved and made available to the Patient to foster a sense of partnership. It also serves as a valuable reference in case the Patient forgets some aspect of the treatment protocol. The Practitioner can create and edit Treatment Plans via the Patient Chart. We format the Treatment Plan into five sections: • General Instructions to the Patient • Instructions to be followed at Breakfast Time • Instructions to be followed at Lunch Time • Instructions to be followed at Dinner Time • Instructions to be followed at Bed Time
 **My Test Results**	This page shows a history of Hormone Testing Lab Results that have been ordered via the Personal Hormones program, and/or entered by hand by the Practitioner. If tests are performed over time, the Patient can visually see the changes over time.
 **My Documents**	If the Patient has old test results or any other document that they would like to share with the Practitioner, they can use this page to upload saved or scanned documents to their own chart Once uploaded, the Practitioner can view the document immediately. We support the uploading of the post popular documents types, such as PDF, DOC, TXT, JPG, etc.

 **Make Appointment**	(Coming soon in a future release) Practitioners can block out times for closed-door consultations on the on-line Appointments Calendar. Patients can then select and reserve these appointment times.
 **Learning Library**	The learning library has extensive information regarding the BHRT approach, explanation of the function of the various hormones, symptoms of related hormonal disorders, links to resources, recommended reading, and other downloadable materials.
 **Audio-Video Library**	Currently contains a selection of 15 different audio and video interviews conducted by Dr. Yaffa on a variety of health topics with experts in the field (the interviews were conducted in the framework of the BHRT World Summit that was organized by Dr. Yaffa in the spring and fall of 2008). Access to the Audio-Video Library is limited to those who have created Patient accounts. Use the dropdown selection to search for programs on specific topics, for example: Menopause, Adrenal Health, and Osteoporosis.

The On-Line Practitioner Portal:

When you Sign-In as a Practitioner via your own BHRT Information Center Page, here is what you will see:



Clicking on either the Pink, Green or Blue box enables you to accomplish the following:

Pink Box:	Go to Your Patient Dashboard
Green Box:	Go To Your Tasks
Pink Box:	Access your Secure Mailbox or Change your Account Settings

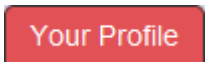
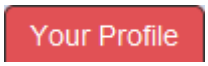
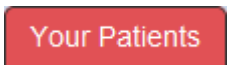
After clicking one of the above boxes, you will see a screen with the following at the top:

The most important of the Red Tabs running along the top of the screen are:

Your Profile, Your Patients, Back-Office, Learning, Services

When one of these Red Tabs is clicked, you are presented with a number of choices along the left-hand side of the screen:

Your Profile **Your Secure Mailbox**	Messages can be sent between Patient and Practitioner via the on-line Portal. Rather than sending the message via regular email, the recipient receives an email alert stating that a message is waiting in their secure mailbox. The recipient then signs-in to the on-line portal to read and respond to messages. From this screen, you may read all messages that have been sent to you by patients and staff, and you may send messages to other staff members or to Personal Hormones Support. To send a message to a Patient, open the Patient Chart and click the “EMAIL” button.
Your Profile **Your Profile Data**	Shows the Provider name, address, phone numbers and Email address as entered by the Provider at the time they created the sign-in account.

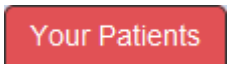
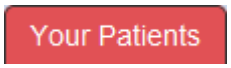
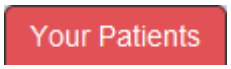
 **Change Profile Data**	Allows the Provider to update their name, address, phone numbers, and Email Address information.
 **Change Your Password**	Allows the Provider to change the sign-in password. The Provider must supply the old password in order to make the change – this prevents an unauthorized party from changing the password if the Provider leaves the computer unattended.
 **Your Patient Dashboard**	The Dashboard gives you a total overview of all your patients in one glance. By default, your most recently active patients are shown first. You may click any column heading to order the list of patients according to the values in that column. You may search by Patient name or partial name, with an option to display Active Patients, Hidden Patients or All Patients. The Activity Date shows the date that a patient performed any type of activity in the system. The "Score" is current the Top-10 Symptom Score that is calculated from the most recent Interview or Follow-Up Interview. The "Trend" shows a Green light if the Patient symptoms appear to be improving over time, a Red light if the symptoms are becoming worse, and an Orange light of the symptoms are unchanged. Female Patient names appear in pink, Males appear in blue. A name in gray denotes that a patient created an account but has not yet filled out the Profile information, so we don't know the gender. Clicking on the Patient name causes the Patient Chart to open in a pop up window.

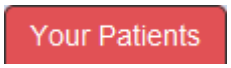
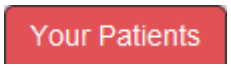
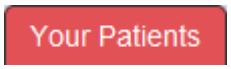
Your Patients **Patient Chart** **NOTES**	This screen allows the entry of your own notes and observations. Information entered here is NEVER visible to the Patient. Notes are displayed in order from most recent to oldest. When entering a new note, You may also specify: 1. The date that the note was made (useful when entering notes that you have accumulated on paper over time and are entering at a later time) 2. A Consult Type: NONE, PHONE, VISIT, EMAIL Every note is saved with a time-stamp and the name of the staff member that created it.
Your Patients **Patient Chart** **TREAT**	This screen allows the entry of the Treatment Plan or Protocol that the Patient will follow. Information entered here is ALWAYS visible to the Patient. Treatment Plans are displayed in order from most recent to oldest. When entering a new plan, you may also specify the date that it becomes effective (useful when entering treatment plans that were prescribed in the past). When entering a plan, specify the instructions that the Patient should follow in clear language that the Patient will understand. Include information about what has been prescribed, how often to take it, how to take it and where (if a cream), what times of day to take it. We recommend that you organize the Treatment Plan into five sections: • General Instructions to the Patient • Instructions to be followed at Breakfast Time • Instructions to be followed at Lunch Time • Instructions to be followed at Dinner Time • Instructions to be followed at Bed Time

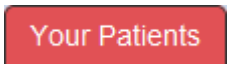
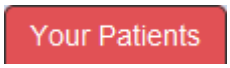
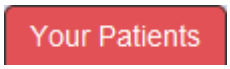
Your Patients **Patient Chart** **TASKS**	This screen provides a comprehensive Follow-up Task manager (aka your “To-Do” list). This information is NEVER visible to the Patient. When entering a new task, you may enter a: 1. Description of the task 2. Date by which the task needs to be completed 3. A checkbox that you can to signify that the task was completed. 4. A list that allows you to assign the task to another staff member. Previously entered tasks are displayed in the following order: Overdue Tasks are displayed first, followed by Pending tasks, followed by Completed Tasks. When you would like to mark a task as “Completed”, click the Edit button and then place a check-mark in the “Completed” checkbox. See “Your Patient Dashboard – Recent Patient Tasks” to learn how to see a consolidated list of tasks for all Patients in your practice.
Your Patients **Patient Chart** **LABS**	This screen enables you to place an order and to pay for a new lab test, and also allows you to enter lab results by hand from testing that was done in the past. When you order testing through the program, the lab results are automatically entered into the Patient chart, and a PDF copy of the lab report is uploaded to the DOCS section of the Patient Chart. When ordering a new test, click the button “Pay for a NEW lab test by credit card”, select from the list of available tests and click “Continue”. A confirmation screen appears, and you can click the “Pay with Paypal” button to enter the Patient credit card information or your own credit card. When entering old lab results by hand, click the button “Enter lab results by hand”, enter the Testing Date, and choose the name of the Testing Lab and then click “Continue”.

Your Patients **Patient Chart** **LABS**	You may Edit or Delete only lab results that you have entered yourself by hand. You may not alter or delete lab results that were ordered through the program, only Personal Hormones staff may perform these operations. See "Services" → "Order Lab Kits" to find out how to have lab testing kits shipped to your office.
Your Patients **Patient Chart** **DOCS**	This screen allows you to upload digital documents directly into the Patient Chart for future reference. You can upload old test results, photos, Word documents, scanned images etc. The Patient can also view these uploaded documents via their own account in the Patient Portal. We support the uploading of the post popular documents types, such as PDF, DOC, TXT, JPG, etc. Click the button to “Choose a file to Upload”, specify if this document should be visible to the Patient (default is Yes), add an optional comment and then click the “Begin Upload” button. You must wait for the upload to complete before you can continue to another screen. If you navigate away from the page then the upload will terminate. You can monitor the progress of the upload in the status bar of your browser window. Displayed below the Document upload area is a list of all previously uploaded documents for this Patient. You may sort the list by Document Name, Document Type, Document Size, Date Uploaded, or by the name of the person who uploaded the document. To view a document, simply click the document name.
Your Patients **Patient Chart** **INTERVIEWS**	This screen allows you to view and print the results of the comprehensive On-Line Medical Interview that was completed by the Patient. Clicking "View" will cause the report to appear in a pop-up window.

Your Patients **Patient Chart** **TRENDS**	This screen shows a color-coded chart of the most severe symptoms reported by the Patient in the initial Medical Interview. Use this chart as the basis for further discussion with the Patient, to visually see if the Patient is progressing positively, negatively or has reached a plateau. After completing the initial comprehensive On-Line Medical Interview, the Patient is encouraged to periodically (preferably at two-week intervals) fill out a small follow-up questionnaire. We take the top 10 most severe symptoms that were rated in the initial On-Line Medical Interview, and ask the Patient to rate the severity of those symptoms on a scale of 0 to 9. In order to get statistically useful data, the system does not allow the Patient to answer the follow-up questionnaire more than once in two weeks. At the top of the chart is a line stating: “Symptoms were last rated NN days ago.”. If NN is more than 14 days, a button will appear to the right that says “Send Reminder Email”. When you click the button, the system immediately sends a reminder email to the patient. We record the date that the reminder was sent, and on subsequent days you will see a message that “Reminder was sent NN days ago”, and you can click the “Send Reminder Email” button as needed until the patient signs-in and completes the Follow-Up Interview.
Your Patients **Patient Chart** **APPOINT**	(Currently under development): This screen allows you to reserve an appointment for a consultation with the Patient (see the Back-Office Appointment Calendars to learn how to make blocks of time available for consultations). This screen also lets you easily place a Recall date onto the Patient chart. The Back-Office Recall Manager will then allow you to print Recall lists that you and your staff can use to contact Patients who may have “fallen through the cracks”. Pharmacists can place a Next Refill Date here so that they can send reminders to the Patient as needed.

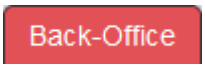
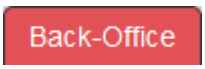
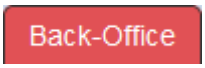
 **Patient Chart** **CONTACT**	This screen shows detailed Patient Contact information such as Name, Address, Phone Numbers, Email Address and Emergency Contacts, and you may also make changes to this information as required. You may also change the User Name and/or Password that the Patient uses for signing-in to the On-Line Patient Portal.
 **Patient Chart** **EMAIL**	This screen allows you to see a complete history of all messages that have been exchanged between the Patient and you or any staff via the Secure Messaging system. Click “Send a Message” to send a new message to the Patient. Rather than sending the message over regular email, the recipient receives an email alert stating that a message is waiting for them in their own secure mailbox. The recipient then signs-in to the on-line portal to read and respond to messages. Using this secure messaging system has the following advantages: 1. Written conversations between you and the Patient are conveniently consolidated in one place in the Patient chart. 2. The messages are more secure and private because they are stored on our secure server and not on yours or the Patients laptop or PC where other parties may be able to access it.
 **Create New Patient**	It’s preferable to have the Patient create an account via the On-Line Patient portal. That forces them to become familiar with the portal and will increase the likelihood that they will take advantage of the many features. However, you will encounter people who do not use computers or may not have access to a computer. Don’t be surprised if you meet Patients who don’t have an email address!

 **Create New Patient**	In this case, you can create a sign-on account for them. Afterwards, sign-in to their account and complete the On-Line Medical Interview together. To create a new Patient account, fill out the form with the requested information and then click the “Create” button. The absolutely required values are First and Last Names, Birth date and Gender. Of course it’s always a good idea to enter address, phone numbers and email address. You also specify a sign-on User Name and Password. (The system will notify you if the chosen User Name is already in use by another person). You can now use the User Name and Password to sign-in on behalf of the Patient, and from there you can help them fill out the On-Line Medical Interview.
 **Recent Patient Notes**	This screen shows a list of the 25 most recent Patient Notes written by either you, another staff member, or by the Patient via the On-Line Patient Diary. By default, the display shows a brief synopsis of Notes written within the previous 6 months. You can expand or narrow the date range using the controls at the top. By default, we display the top 25 most recent Notes. You can choose to display more or less by using the drop-down menu at top. By default, we display Notes written by anyone. You can choose to view only Patient Diary Comments or only Practitioner Notes by selecting from the drop-down menu at top.
 **Recent Patient Plans**	This screen shows a list of the most 25 recently written Patient Treatment Plans written by either you or other staff members. By default, the display shows a brief synopsis of Treatment Plans written within the previous 6 months. You can expand or narrow the date range using the controls at the top.

 **Recent Patient Plans**	By default, we display the 25 most recently written Treatment Plans. You can choose to display more or less by using the drop-down menu at top.
 **Recent Patient Tasks**	This screen shows a list of the Patient Follow-up Tasks that need to be completed by either you or other members of your staff. By default, the display shows 25 Tasks. You can choose to display more or less by using the drop-down menu at top. By default, we show Pending & Overdue Tasks. You can also choose to see only Pending tasks, or only Overdue tasks, only previously Completed tasks, or ALL tasks. By default, we display only tasks that are specifically assigned to you. You can see tasks that are assigned to others on your staff by selecting from the drop-down menu at top. Tasks are displayed in the following order: Overdue Tasks are displayed first, followed by Pending tasks, followed by Completed Tasks. To add a Progress Note to the Task, or to mark the Task as completed, click the Patient Name. The Patient Chart will open in a new window, and you can make your desired changes there.
 **Recent Lab Orders**	This screen shows a list of your Recent Lab Orders. By default, it shows the most recent 25 orders. You can search for orders by Patient name or partial name. You can limit the display to orders made within a certain date range. You can filter the display to show orders that are: Pending, Unpaid, Completed, Entered by Hand, or Any Lab Order regardless of status or type.

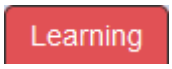
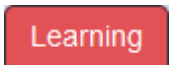
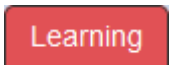
Your Patients **Recent Activity**	This screen shows you a list that alerts you to various activities that you should know about, for example: 1. A Patient created a new sign-in account (also see "Your Patient Dashboard" → "Recent Patients" for more detail). 2. A Patient recently completed an On-Line Medical Interview. 3. A Patient recently completed a Progress Interview and has provided new ratings for their top-10 symptoms. 4. A Patient created, updated, or deleted an entry in the on-line Patient Diary, or uploaded or deleted a document to the Patient Chart. 5. A Patient updated profile information, such as name, address or password.
Your Patients **Recent Patients**	This screen shows a historical record of all Patients who have created sign-in accounts via your Personalized BHRT Information Web Page. By default, it shows the most recent 25 accounts sorted by date of creation. You can order the display by Account Creation Date, Email Address or Patient Last Name. You can also filter accounts that were created within a certain date range. ***Note that where the Patient name shows "<Account Activation Pending>" in place of a real name, the Patient registered and received a welcome email with an activation code. The system is still waiting for that Patient to sign-and enter the activation code, which signifies that the email address is valid and that they agreed to the terms and conditions of the program. If they do not complete the account activation process, this screen shows their email address. You can send an email to that address to ask if you can be of any assistance.

Your Patients **Trends Analysis**	This page gives you a choice of reports that allow you to find: 1. Patients who completed the On-Line Medical Interview. 2. Patients who did NOT complete the On-Line Medical Interview. 3. Patients who submitted Progress Follow-Up Ratings of their symptoms. 4. Patients who have NOT submitted Progress Follow-Up Ratings of their symptoms. A variety of controls are provided that let you filter patients meeting certain criteria. For example, you can narrow down your list of patients to those whose condition is improving, or who have recently reported very severe symptoms. Once you have narrowed down your list of Patients, you can click the button “Download CSV” to download a file that can be imported into a Spreadsheet program, or “To: Format” which displays the Patient Email Addresses in a format that can be immediately copied and pasted into an email message.
Your Patients **Demographic Analysis**	This page displays charts that show you the number of Patients in your database, broken down by Gender, and also displays the average ages of your patients. By default, we display counts of all Patients that have been entered into the database. The drop-down controls at top let you alter the reported time period so that you can display counts of New Patients that entered the database in the Current Month, in the Current Year to Date, or in the Previous Full Year. By comparing New Patient Counts across different time periods, you can measure whether you are meeting your own goals for attracting new Patients. By default, we display all Patients whether Active or Inactive. The drop-down control at top let you limit the display to just Active Patients, or just Inactive Patients. Note: Pharmacists also see Patient counts for the Prescribing Practitioners that they sponsor.

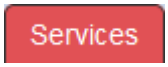
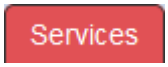
 **Office Home**	This page serves as a virtual Office Bulletin Board. Office Staff can post announcements that need to be seen by all Staff Members, just as they would post on a physical Bulletin Board. Examples: Special Promotions being offered this month or staff vacation schedules.
 **Appointment Calendars**	(Under development): This screen lets you Create appointment calendars. You can create multiple calendars, perhaps for different office locations or for different staff members. Once a calendar is created you can easily Rename or Delete it. Use the controls on the screen to select a calendar of interest and advance through and display different months and years. You can choose to display the calendar information in a variety of formats – traditional calendar grid or as a vertical list of scheduled items/appointments. Use the “Block Time” feature to define blocks of time for appointments that Patients can book through the On-Line Patient Portal. Use the “Create Personal Event” feature to place an event on the calendar for yourself. For example, you can show your staff members when you will be away on vacation. To schedule a consultation appointment with a Patient, go to the Patient chart and click the “APPOINT” button.
 **Email List Manager**	This powerful feature allows you to easily create and manage a list of email addresses that will be used for sending marketing emails. Email addresses appear automatically for all Patients that have already created an account via the On-Line Patient Portal. Email addresses also appear automatically for all staff member sub-accounts.

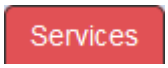
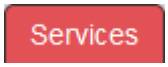
Back-Office **Email List Manager**	There is a single-line area on the page where you can add Email addresses that are not in your database. Simply enter the Email address, First and Last Names and click “Add this Email”. There are many options for viewing the email address list: 1. Default Format is the Grid Format that shows the Email Address, First and Last Names and the date that the Email was added to the list. 2. To: Format – Shows a list that you can simply copy and paste into a new email message that you wish to compose using the email program of your choice. 3. Download CSV – Downloads a file to your computer in spreadsheet format that can be opened using Microsoft Excel, or uploaded to mass-mailing services such as “Constant Contact”. There are many options for filtering the list of Email addresses of interest: 1. Show only Emails addresses that were added to the list within a certain range of dates. 2. Show Email addresses belonging only to current Patients, or only staff, or only prospects that you’ve entered manually, or everyone. 3. Show only Email addresses that appear to be a valid format (i.e. address@somewhere.com), or show those Email addresses that are NOT a valid format, or show All. You can choose to display the selected Email addresses in order of: Alphabetically by Email address, Last Name, First Name or by Date of Entry into the system.
Back-Office **Manage Prescribers**	Note: This page appears only for Pharmacy accounts. It does not appear on Physicians or NP accounts. The page enables the Pharmacy to maintain a database containing the names and office information of local BHRT Prescribers. The Pharmacist can link a patient to a Prescriber by visiting the TREAT page of the Patient Chart.

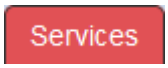
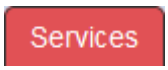
Back-Office **Manage Sub-Accounts**	As new staff is hired, they can self-create a new "PROVIDER" sign-in account. New accounts are granted the "STAFF" role by default. Only Personal Hormones Staff can elevate a user to a "MANAGER" role, which is always coordinated with the Practice owner in advance. The "MANAGER" role gives access to certain site features that are denied to regular "STAFF". This screen, for example, can be accessed only by "MANAGERS". When a staff member creates a "PROVIDER" sign-in, they are not given instant access to your account. This prevents any random third-party from getting access to your Patient charts. Instead, a "New Account Activation Request" appears on this screen. Next to the request are "Approve" and "Reject" buttons. When you Approve or Reject a request, an email is sent to the associated email address to let the party know that their request was approved or rejected. Important: If a Staff member leaves your practice, use this screen to instantly Disable their sign-in privileges. If the Staff member returns to your practice, you can re-enable the sign-in account at any time. A sign-in account can never be deleted from the system completely. It can only be disabled. The reason: The staff member may have entered Notes, Plans, Tasks, Labs, Documents, and Appointments or sent Secure Emails, and if the account were deleted completely, all of this history would become lost or orphaned. If the staff member moves to a different practice and wishes to use the same Email address as a sign-in identifier, they can contact Personal Hormones staff who will make the change internally.

 **Learning Home**	This page is an introduction to the Training area and has links that allow you to download the software required to view and listen to the various training modules. You must have Adobe Flash Player installed on your computer in order to listen to the Audio accompaniments. (To owners of the Apple IPhone, ITouch and IPad: Unfortunately, Apple has decided not to allow the installation of Adobe Flash on your devices, and we apologize for the inconvenience that this causes at this time)
 **Practitioner Training**	This screen presents a series of 11 slide shows with accompanying audio, designated for Practitioners who wish to learn how to diagnose and treat hormonal disorders using BHRT. There are approximately 220 slides across the 11 modules. To begin a training slideshow, click the Slideshow button to pop-open a training window. Use the “Next Slide” and “Prev Slide” buttons to move through the slides, and use the drop-down list (that shows, for example: Slide 1 of 23) to move directly to a particular slide. Click the Audio play arrow to listen to the accompanying Audio narrative. Complete transcripts of the narrative and slides can be downloaded to your computer in PDF format. Simply click the PDF icon for the desired module and the download will begin.
 **Staff Training**	This screen is identical to the Learning – Practitioner Training, but is a condensed version suitable for Staff and Sales people. There are approximately 140 slides over 7 modules.

Learning **Take a Quiz**	This page presents 9 quizzes that correspond to the modules in the Practitioner Training program. Select a quiz and advance through the pages to review the various questions and answers.
Learning **Audio-Video Library**	Currently contains a selection of 15 different audio and video interviews conducted by Dr. Yaffa on a variety of health topics with experts in the field (the interviews were conducted in the framework of the BHRT World Summit that was organized by Dr. Yaffa in the spring and fall of 2008). Use the dropdown selection to search for programs on specific topics, for example: Menopause, Adrenal Health, and Osteoporosis. These same programs are available to Patients via the On-Line Patient Portal.
Services **Service Description**	This page shows information about your practice (and all of your branch locations if applicable). If you are a Medical Practitioner being sponsored by a local Pharmacy, the next section shows information regarding your sponsor. If you are a Pharmacist, the next section shows a listing of all of the Medical Practitioners that you have sponsored for participation in the BHRT Program.
Services **Marketing Downloads**	This page allows you to download the program marketing materials to your computer. Feel free to browse through the library of Flyers, Stuffers, Fact Sheets, Posters, Email Topics, Powerpoint Presentations, Patient Handouts, Lab Testing Order Forms and Instructions. All of the printable materials are in high resolution PDF format - you just need to send them out to your local print-shop (i.e. Kinkos, Sir Speedy). Where appropriate for a document, you are given the option to download either a “Generic” version or a “Custom” version of the document.

 **Marketing Downloads**	The “Custom” version of the document shows your Practice Name, Address, Phone Numbers and Web Address. When you click “Custom a window pops-up and displays your Practice Name, Address, Phone Numbers and Web Address. Confirm that this information is correct and then click the “Download Now” button. You can edit the Personalization information as desired before downloading. Clicking “Generic” will download a version of the document without the Personalization information. Note: Not all documents can be personalized. The “Custom” option will appear whenever a personalized version is available.
 **Personalized Web Page**	This page shows the practice name, address and phone numbers of the Pharmacy or Medical Practice, and a staff photo (if one has been provided), all of which appear on your personalized BHRT Information Center Web Page. There is a link that lets you visit your personalized BHRT Information Center Page (opens in a new window), and a link that lets you edit the information on the BHRT Information Center web page. The Personalization screen opens in a pop-up window. In this window, you can change the Practice Name, Address, Phone Numbers etc. Once your changes are saved, people will immediately see the new information on your personalized BHRT Information Center Web Page. **Note:** This personalization information also appears on your “Custom” marketing downloads. The left most column of your personalized BHRT Information Center web page is reserved for your own Personalized Messages. Typically, we post your Office/Store Hours, a link to Driving Directions, Special Services and other useful information in this area.

 **Personalized Web Page**	This message area is broken into 3 parts. You can edit the information that appears here, for example the names of staff members to contact, or special promotions that you are offering during a certain time period. If you would like to update your logo and/or staff/store photo, you can email them to Support and we'll be happy to post them to your page.
 **Order Lab Kits**	For those that participate in our Lab Testing Program, this page allows you to order lab testing kits as needed. For example, you can ask that 10 Saliva Testing Lab Kits be shipped to a certain location. Ordering lab tests through our program offers several advantages: 1. The test results are automatically uploaded to the Patient chart, saving you time and maximizing privacy. 2. Our system checks for results each day, and if it appears that the patient has delayed sending the samples to the lab then our system generates an automatic email to remind the patient. Our technology does the follow-up so that patients don't "fall through the cracks". In order to participate in our lab testing program, you must first complete a Lab Testing Agreement Form, the lab fees must be paid at the time that the testing kit is given to the patient, and you must supply us with a Credit Card number to be billed in the event that lab results are received without having been paid for in advance. Everything that you need to know about lab testing can be downloaded from the "Marketing Downloads" area of your account by selecting "Display Marketing Materials of Type: Lab Testing".

 **Consult History**	(This feature is currently under development): This page enables you to track the status of Consults that you have requested for patients. You request a Consult by entering your own Notes and Comments into the NOTES page of the Patient Chart, and then click the button “Request Consult”. You are asked to confirm that you would like a Consult for that Patient. When OK is clicked, the Consult Request is entered into the database. Personal Hormones Clinical Staff will review the Patient Chart, and send an email when new comments have been left in the Patient NOTES.
 **Invoices & Payments**	This page allows you to view Invoices and pay for services related to the Personal Hormones program.