



## DIRECT TO PATIENT PORTAL

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# NEW DIRECT TO PATIENT PORTAL

The brand new *Direct to Patient Portal* will serve as a more advanced, and more streamline, interface to place contact lens orders. The purpose behind the new portal is to expand on the old **Contacts to Patient** page and to allow the customer the ability to manage their orders and practice more efficiently by giving them the option to add/update patient/doctor directories, add multiple practice locations for shipping, access centralized order history, generate/export shipping reports, and submit reorders fluently. The new portal will save time, save the hassle of repeat data entry, and give the customer more time to spend with their patients!

The link to the portal can be found on the home page of [www.nassau247.com](http://www.nassau247.com) under the Contact Lenses tab on the left side of the screen.

**NOTE:** For customers who wish to continue using the old *Contacts to Patient*, the link will remain active for their use. Orders placed through this page can be accessed in the *Direct to Patient Portal* as well.

**Pre-existing Contacts to Patient ordering page**

**NEW Direct to Patient Portal**

**NASSAU Vision Group**

**nova**  
OPTICAL LABORATORY

**nassau 24/7**  
www.nassau247.com

Home | Products | Promotions | News | Company | My Account

View Cart

**Place Orders Below**

Stock Lenses

- Single Vision
- Multifocal
- SV Grid Order
- Crizal Lens Banks

Contact Lenses

- Contacts Order
- Contacts to Patient
- new Direct Patient Portal**

Other Ordering

- Lab RX
- Accessories
- Barcode Ordering
- Flat File Ordering

*Introducing... SHOF*

Digitally Engineered for Effortless Vision

Digitally Engineered Optics in a Full Back Side

Delivers Effortless Vision in a Full Back Side Lens

CLICK HERE FOR MORE INFORMATION

**2014 Updated Stock & Contact Lens Policies**

*New Free Shipping Options!*

Have a favorite local Nassau Messenger? Great news, all Nassau supported messengers are now included in our free shipping specials!

CLICK HERE FOR MORE DETAILS

# LOG IN/SIGN UP

Customers must have a Nassau247.com to benefit from this portal.

If the customer **does not** have a Nassau247.com web account, s/he can click the Register to Order Online button and sign up for a new account.

Customers should allow 24 hours for their new online account to be set up. Customers will receive a phone call once the online account has been created.

The image shows two screenshots of the Nassau247.com website. The top screenshot shows the website header with logos for NASSAU Vision Group, nova OPTICAL LABORATORY, and nassau 24/7. A blue arrow points from the text 'Log In or Register to Sign Up for a new account' to the 'Log In' button. A red box highlights the 'Register to Order Online' and 'Apply for an Account' buttons. The bottom screenshot shows the 'Sign Up for Your New Account' form. A blue arrow points from the text 'New Web Account Customers: Complete form to sign up' to the form. The form includes fields for User Name, Password, Confirm Password, Email, Practice Name, 10 digit acct#, and Phone, along with a 'Create User' button.

**Log In or Register to Sign Up for a new account**

**New Web Account Customers: Complete form to sign up**

**Sign Up for Your New Account**

User Name:

Password:

Confirm Password:

Email:

Practice Name:

10 digit acct#:

Phone:

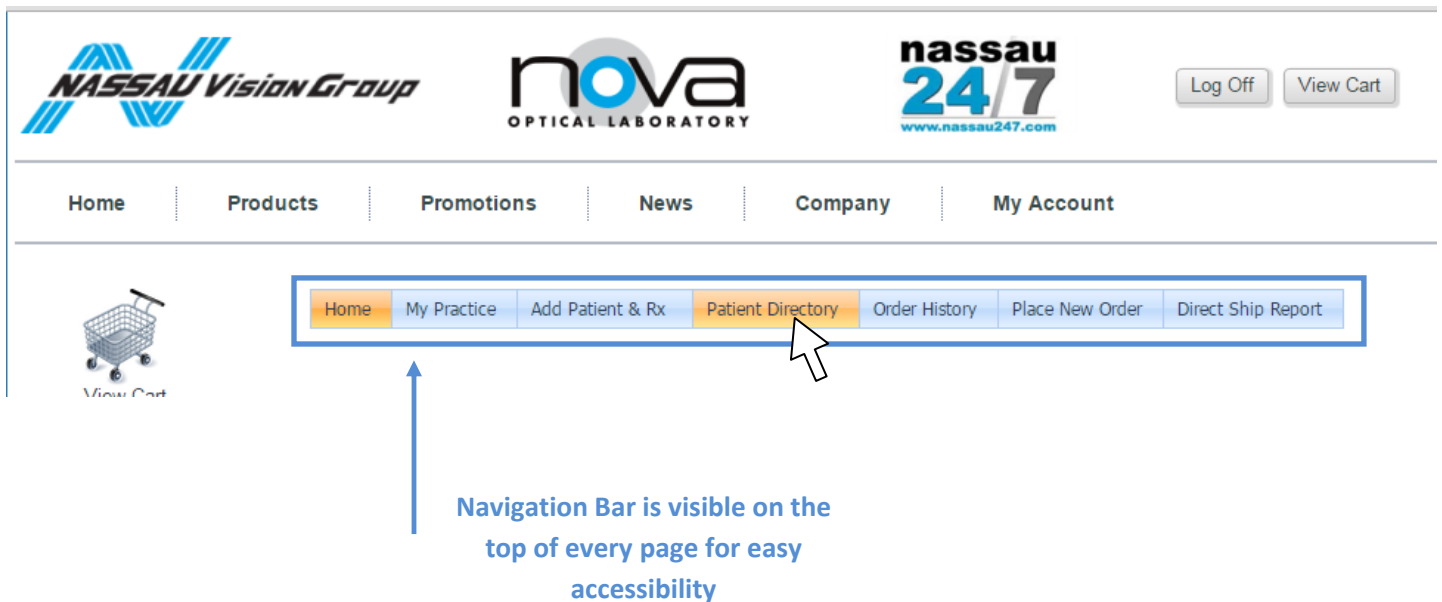
# NAVIGATING THE PORTAL

Once logged in and the *Direct to Patient Portal* is open; navigation is simple and intuitive. At the top of the screen is a table with tabs to the different pages of the portal.

The tabs are:

- Home
- My Practice
- Add Patient & Rx
- Patient Directory
- Order History
- Place New Order
- Direct Ship Report

The customer simply needs to click on the page s/he wishes to visit and can continue from there.



See following pages for details on the features and uses that each page has to offer.

# HOME TAB

Introduction to the new portal and link to this instructional document.

# MY PRACTICE TAB

This page allows the customer to organize his/her practice by inputting Doctors who are on staff as well as multiple office locations for shipping (if applicable). This feature lets the customer group orders later on based on which doctor placed them, leading to better organization of the practice. The portal saves different office locations making shipping the contacts at the end of the order just one click away from wherever it needs to go.

**NOTE:** The multiple office addresses are for **SHIPPING PURPOSES ONLY**. The **BILL TO ADDRESS** is linked to the information associated with the account number and cannot be change in this portal.

**Practitioner List**

	First Name	Last Name
<a href="#">New</a>		
<a href="#">Edit Delete</a>	Dr. Sam	Lee
<a href="#">Edit Delete</a>	Dr. Lisa	Jones
<a href="#">Edit Delete</a>	Dr. Peter	Falk

**Office Locations**

	Practitioner	Office Name	Address1	Address2	City	State	Zip	Country	Phone
<a href="#">New</a>									
<a href="#">Edit Delete</a>	Dr. Sam Lee	ECP Northvale	123 Main Street		Northvale	NJ	07647	US	555-555-5555
<a href="#">Edit Delete</a>	Dr. Lisa Jones	ECP Harrington Park	369 South Street		Harrington Park	NJ	07640	US	444-444-4444
<a href="#">Edit Delete</a>	Dr. Peter Falk	ECP Norwood	147 Broadway		Norwood	NJ	07648	US	333-333-3333

[Go to Patient Directory](#)   [Go to Place Order](#)

# ADD PATIENT & RX TAB

This page is where new patient information can be added to the customers practice directory. The entry fields include:

- *Personal information* (i.e., name, phone #, address, birthday etc)
- *Last Exam date* (which will automatically populate the recall date 1 year in advance from the selected date)
- *Practitioner* (which can be selected from the practitioner list he/she set up on his/her 'My Practice' page)
- *Right / Left eye Rx information* (style, color, brand, name, base curve, sph, cyl, axis, add, color side, and quantity)

It is important to note that any required fields with missing information will be highlighted in red and the portal will not let the customer continue until all required fields are populated with data.

The screenshot shows the 'Add Patient & Rx' form with the following components and annotations:

- Navigation Bar:** Home, My Practice, **Add Patient & Rx**, Patient Directory, Order History, Place New Order, Direct Ship Report.
- Add New Patient Section:**
  - Fields: FirstName, Last Name, Email Address, Date of Birth, Last Exam Date, Exam Recall Date, PatientID, Phone #, Address1, Address2(Suite, Apt #, etc.), City, State, Zip.
  - Annotation:** "Missing data warning" points to the Last Exam Date field, which has a red border and a red error message: "Last Exam date is required".
  - Annotation:** "Patient personal information input" points to the entire top section of the form.
- Practitioner Selection:** A drop-down menu labeled "Practitioner".
  - Annotation:** "Drop down list of all doctors added on 'My Practice' page" points to this menu.
- Rx- Right Eye Section:** "Right Eye Contact Lens Selection" form with fields for Style, Colors, Brand, Lens Name, Base Curve, Sph, Cyl, Axis, Add, Color Side, Qty, and a "Copy Rx for Left Eye" button.
  - Annotation:** "Copies all information inputted for the Right eye into the Left eye chart below" points to the "Copy Rx for Left Eye" button.
- Rx- Left Eye Section:** "Left Eye Contact Lens Selection" form with similar fields to the right eye section.
- Submission Buttons:** "Add Patient" and "Add Patient and Place an Order".
  - Annotation:** "Submits patient information and Rx in the 'Patient Directory'" points to the "Add Patient" button.
  - Annotation:** "Adds patient and Rx information into the directory and brings customer to the 'Place New Order' page with patient contacts already added to the cart" points to the "Add Patient and Place an Order" button.

# PATIENT DIRECTORY TAB

This page shows all the patient information that has been added for the customers' practice. Patients can be searched by (first name, last name, email, phone #, last exam date, CL Rx expiration date, patient ID, birth date, or practitioner). Patient information can either be edited here or deleted from the list as well.

By clicking on the "+" button next the patient's name it expands there information to include:

- **Address** (which can be searched, edited or deleted if multiple addresses exist)
- **Rx Info** (showing the doctor who placed the order, Rx date/expiration, Rx left/right eye, and the option to order or delete that Rx)
- **Order History** (showing order number, first name, last name and links to view those orders in the 'Order History' page)

The screenshot shows the 'Patient Directory' tab in a web application. At the top, there is a navigation bar with links: Home, My Practice, Add Patient & Rx, Patient Directory (highlighted), Order History, Place New Order, and Direct Ship Report. Below the navigation bar is the 'Patient List' table with columns: First Name, Last Name, E-mail, Phone, Last Exam Date, CL Rx Expiration, and Ex Patient ID. The table contains four rows of patient data. Annotations include: 'Add new patient information' pointing to a 'New' button; 'Search criteria' pointing to the search bar; 'Expand patient information (Address, Rx Info, and Order History)' pointing to a '+' icon in the first column; 'Edit/Delete existing information' pointing to 'Edit Delete' links; 'Scroll bar to view more data fields' pointing to a horizontal scrollbar; and 'Directs customer to Place an Order' pointing to a 'Go to Place an Order' button. Below the main table, three expanded views are shown: 1) 'Address' view with columns: New, First Name, Last Name, Address1, Address2, City, State; 2) 'Rx Info' view with columns: #, New, Practitioner, Rx Date, Rx Expiration, Right Eye, Left Eye; 3) 'Order History' view with columns: Order Number, First Name, Last Name. Annotations for these views include: 'Directs customer to Place New Order tab \*must select patient first' pointing to the 'Go to Place an Order' button; 'Brings up order in Order History tab' pointing to an order number in the Order History view; and 'Directs customer to Place New Order tab with product/patient information already added to cart' pointing to an 'Order' button in the Rx Info view.

# ORDER HISTORY TAB

The order history page will show all the contact orders placed by the customers practice. UPS Tracking numbers (if available) will also show up on this page for the customer to reference. Orders can be looked up by (Order ID, Order Date, Practitioner, Patient ID#, and Shipping Method, Last Name, First Name, or UPS Tracking #). The added benefit of this new page is perfect for long term patients since, not only can previous orders be viewed like before, but the customer now has the added option to reorder the same shipment with one click of a button!

**NOTE:** As mentioned before orders placed in the old **Contacts to Patient** page will still show up in the order history page of the new **Direct to Patient Portal**.

Home My Practice Add Patient & Rx Patient Directory Order History Place New Order Direct Ship Report

### Order history

**Search criteria** →

oid	Order Date	Practitioner	Patient id#	Shipping Method	Last Name	First Name	UPS Tracking
3188087	9/17/2015	Dr. Sam Lee	1A25S	Ground	Smith	Steven	
3188069	9/17/2015	Dr. Peter Falk	1jj74	Ground	Jonston	Jennifer	
3188068	9/17/2015	Dr. Sam Lee	1A25S	Ground	Smith	Steven	
3161000	8/24/2015	Dr. Sam Lee	1A25S	Ground	Smith	Steven	
3096323	6/25/2015	Dr. John Snow	P1	Ground	TEST	TEST	
3096292	6/25/2015			Overnight	TEST	TEST	
2977559	3/3/2015			Ground	Mouse	Mickey	
2875808	11/19/2014			Ground	Test 6	Test 6	
2875735	11/19/2014			Ground	TEST 5	TEST 5	
2875683	11/19/2014			Ground	TEST 3	TEST 3	

Page 1 of 2 (18 items) < 1 2 >

**Selected order history information** →

**Order Summary**

**Order Number:** 3188087

<b>Customer:</b> NASSAU TEST ACCOUNT	<b>Name:</b> Steven Smith
<b>Phone:</b> 201-767-8033	<b>Address:</b> 15 Maple Street
<b>Contact:</b>	<b>Address2:</b>
<b>Email:</b> sfalkenstern@nassaulens.com	<b>City State Zip:</b> Northvale, NJ 07647
<b>Acct#:</b> 3013057000	<b>Patient Phone:</b> 123-456-7890
	<b>Ship by:</b> Ground

Qty	Item	Patient Info
1	L Ciba Air Optix Aqua 8.6 -4.50 Clear	Ds L
1	R Ciba Air Optix Aqua 8.6 -4.50 Clear	DS R

Thank you for your continued business with Nassau Vision Group. The source for your optical lens needs and more.

Nassau Vision Group cannot guarantee same day shipment of all items, but will put forth our best effort to get your items out asap.

**CONFIDENTIALITY NOTICE:** This communication is only for the person(s) named above. Unless otherwise indicated, it contains information that is confidential, privileged or exempt from disclosure under applicable law. If you are not the person(s) named above, or responsible for delivering it to that person(s), be aware that disclosure, copying, distribution or use of this communication is strictly PROHIBITED. If you have received this communication in error, or are uncertain as to its proper handling, please immediately notify us.

Reorder

← **Reorder button brings customer to the 'Place New Order' page with all the patient / Rx information already added to the cart**



# PLACE NEW ORDER TAB

The *Place New Order* page is the final step before an order is placed for shipping. Here the customer can select a patient from his/her patient directory (they also have the option to add a new patient or office and will be directed to the corresponding pages). The Rx is then selected from a drop down menu based off of the prescribed date (if a new Rx is needed there is a button to add a new one on the page). This page is also where the customer can add on accessories such as (Edging Supplies, Tints, Press on Powers, ect...). The bottom of this page is where the items in the cart can be reviewed and a final shipping address can be chosen.

Select patient from drop down directory

Choose Rx by date and the description populates below

Adds accessories to cart

Edit quantity # or delete item

Home My Practice Add Patient & Rx Patient Directory Order History **Place New Order** Direct Ship Report

Choose Patient  
Steven Smith  
Add New Patient Add New Office

Choose Rx to Order  
09/01/2015  
Add New Patient Rx

Right Eye Rx Description  
R Vistakon - Acuvue 1 Day Moist 30pk 8.5 -2.00 Clear  
Right Eye Rx Description  
L Vistakon - Acuvue 1 Day Moist 30pk 8.5 -2.25 Clear  
Rx has been added to cart.

Add Rx to Cart

Accessories selection

Choose category: Edging Supplies Liquid Solutions Tints Contact Lense Supplies Press On Powers

Choose Product:

Qty: 1  
Est Price 0.00  
Order

#	Opc Number	Item Description	Qty	Patient Reference
Edit Delete	733905577178	Left Vistakon - Acuvue 1 Day Moist 30pk 8.5 -2.25 Clear,0,0	1	DS Left
Edit Delete	733905577161	Right Vistakon - Acuvue 1 Day Moist 30pk 8.5 -2.00 Clear,0,0	1	DS Right

Shipping and order completion

Choose Shipping Address  
 Ship to Patient  Ship to Office

Ship Method  Ground  Overnight  US Priority Mail

Start Over Send Order

Directed to 'Add Patient & Rx' and 'My Practice' to input new data

Directed to fill in new Rx

Adds Lens to cart

Choose to ship to either patient or office address on file and choose the shipping method

Place the order or clear the information to start over

Shopping Cart

# DIRECT SHIP REPORT TAB

This page allows the customer generate order/shipping reports for selected date ranges. Once the report is generated the customer can export the data into the following file formats:

- PDF
- XLS
- XLSX
- RTF
- CSV

The reports are broken down into columns (Order #, Order Date, Practitioner Name, Patient Name, Email, Address 1, Address 2, and City) which can be rearranged into whatever order the customer likes best. These columns can also be dragged into the top row to group the report based off that column value allowing the customer to consolidate and order the data to best suit his/her needs before export.

**Select date range** →

**Generate report for selected range** ←

**Export file options** ←

**Moveable column headings** ←

**Group report by heading** ←

**Newly arranged report** ←

Order #	Order Date	Patient Name	Practitioner Name	Email	Address1	Address2	City
3188068	9/17/2015 5:03:00 PM	Steven Smith	Dr. Sam Lee	steve@gmail.co	300 21st Street	Apt 2B	State College
3188068	9/17/2015 5:03:00 PM	Steven Smith	Dr. Sam Lee	steve@gmail.co	300 21st Street	Apt 2B	State College
3188068	9/17/2015 5:03:00 PM	Steven Smith	Dr. Sam Lee	steve@gmail.co	300 21st Street	Apt 2B	State College
3188068	9/17/2015 5:03:00 PM	Steven Smith	Dr. Sam Lee	steve@gmail.co	300 21st Street	Apt 2B	State College
3188069	9/17/2015 5:03:00 PM	Je Jc					
3188069	9/17/2015 5:03:00 PM	Je Jc					

**Direct Ship Report**

Start Date: 09/01/2015 to End Date: 09/22/2015

Export to PDF | Export to XLS | Export to XLSX | Export to RTF | Export to CSV

Drag a column to group by that column

Patient Name

Order # | Order Date | Practitioner Name | Email | Address1 | Address2 | City | State

Patient Name: Jennifer Jonston

Patient Name: Steven Smith