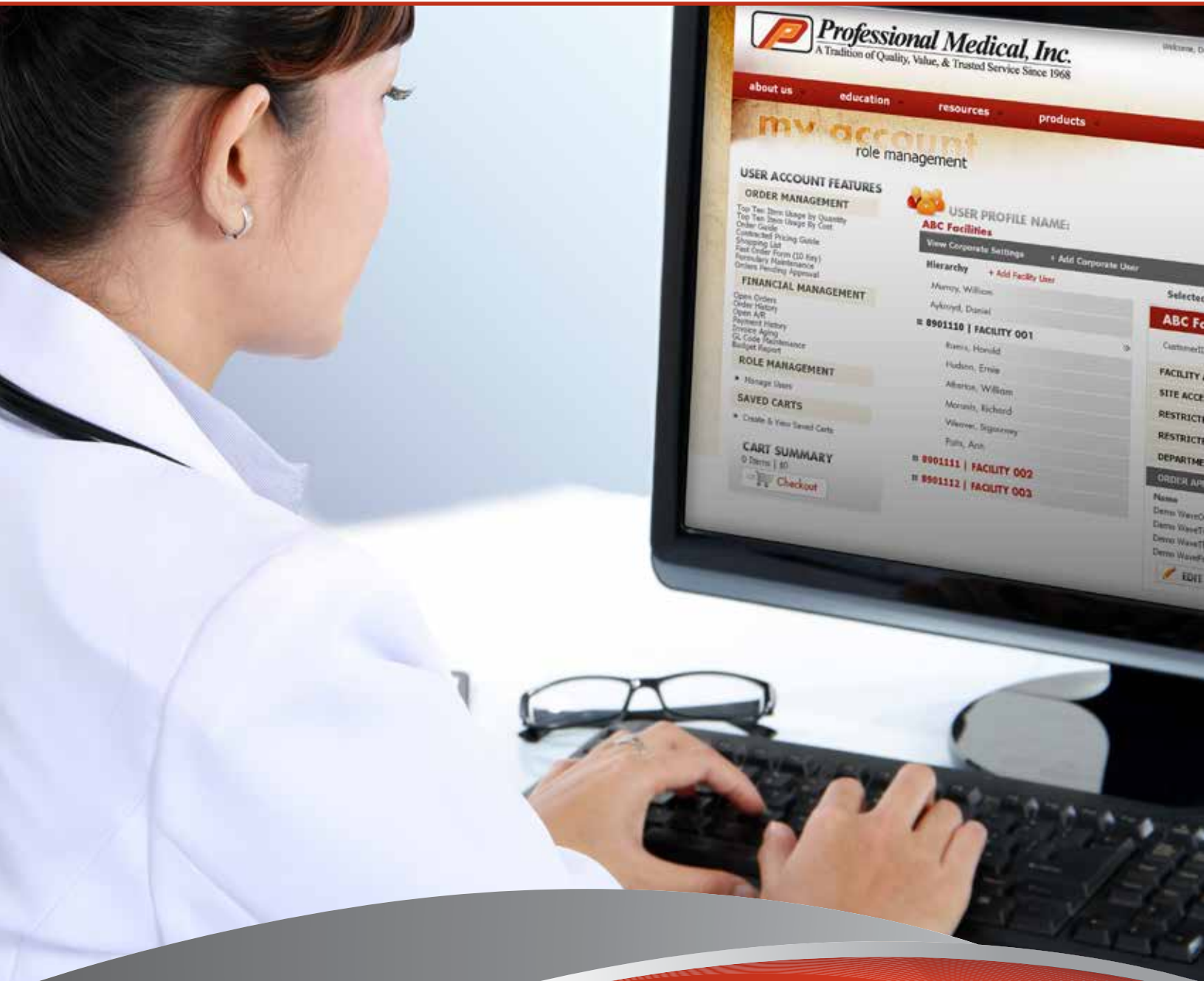


Role Management and Budgets



PROFESSIONAL MEDICAL, INC.

Getting Started



WHO SHOULD UTILIZE ROLE MANAGEMENT?

Registered users at promedsupply.com can utilize our exclusive Role Management tool, which was designed to help both single homes and chains manage and control spending on multiple levels. Role Management is a good fit for your facility if you answer “yes” to the following questions:

- Do you have online ordering capabilities?
- Are your staff members comfortable with computers?
- Are you interested in a simple, streamlined process?

(Fig. 1)



(Fig. 2)

Role Management's rich, comprehensive capabilities will simplify your ordering process and bring you peace of mind.

Role Management provides control over who is placing orders, what they are capable of ordering and how much. Let's say you want to allow a staff member to order janitorial products, but nothing else, and you want to approve orders before they're submitted. Role Management can do that. Want to allow someone else to order whatever they need, as long as it doesn't exceed \$500? It can help you with that too.

Getting started

To begin using Role Management, you must provide your ProMed territory manager with a list of staff members who will be using the program. Our team is happy to assist with importing facility-specific information so that you can get started right away.

Once your Role Management account has been created, log on to www.promedsupply.com and click on the "Manage Users" link on the left-hand side of the My Accounts page.

When a new Role Management account is set up, either a corporate user (for a multi-facility chain) or facility user (for a single facility) is created. This user has the ability to add additional users, assign permissions, select facility administrators, set budgets and create departments.

To add a new user, click on the "+ Add Corporate User" or the "+ Add Facility User" link (Fig. 1). Complete the required information and click "Add User" (Fig. 2).

Permissions and Access

(Fig. 3)



(Fig. 4)



(Fig. 5)

Account authorization and permission options

Users can restrict access to specific items, including formulary, latex and non-Smart Choice™ products. They can also set a landing page – the first page a user will see upon logging in – and establish whether the user should have administrator access, which allows them to add users and change account settings (Fig. 3).

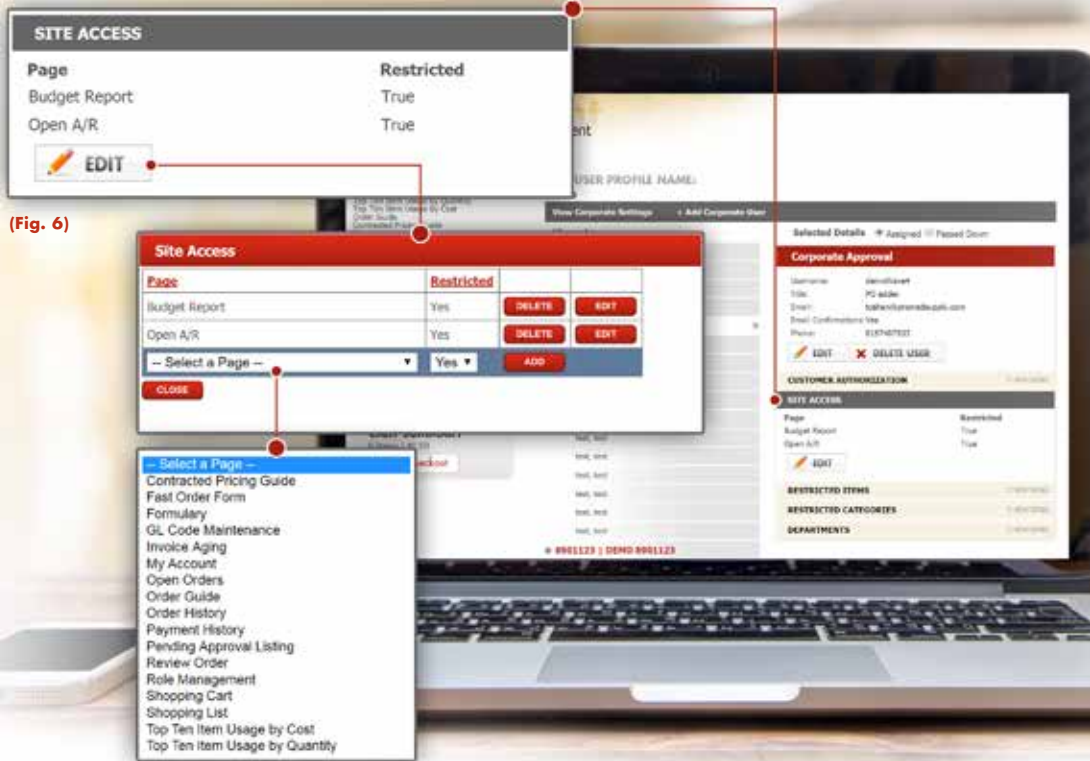
Here's an overview of the different access options:

- **No approval needed:** These users can order above budget and select non-formulary, latex and non-Smart Choice items with no approval needed.
- **Approval needed:** Approval is required by an administrator if the user orders above budget or chooses non-formulary, latex or non-Smart Choice items.
- **Notify on order:** These users can order above budget and select non-formulary, latex and non-Smart Choice items, but they will see a pop-up box that notifies them that they are doing so.

- **Restrict from cart:** Carts that are above the budget or that contain non-formulary items cannot be submitted for purchase.
- **Restrict from view:** When this option is selected, users will not be able to view any non-formulary, latex or non-Smart Choice items.

Additionally, there are three levels of permissions (order authorization, budget authorization and item property authorization) that can be set and restricted (Fig. 4).

For your convenience, permissions can be set as either "Assigned" or "Passed Down" (Fig. 5). If "Passed Down" is selected, any permissions that were set on a corporate or facility level will be displayed, saving you the time of having to set permissions for each individual user (you will still be able to adjust these settings for each user if you choose). If no corporate or facility permissions were set, the options will default to "No Restrictions." When "Assigned" is selected, permissions that were assigned to the specific user will be displayed.



(Fig. 6)

Site access (Fig. 6)

Administrators (both corporate and facility) can also control access to individual pages on promedsupply.com, including:

- Contracted Pricing Guide
- Fast Order Form
- Formulary
- GL Code Maintenance
- Invoice Aging
- My Account
- Open Orders
- Order Guide
- Order History
- Payment History
- Pending Approval Listing
- Review Order
- Role Management
- Shopping Cart
- Shopping List
- Top Ten Item Usage by Cost
- Top Ten Item Usage by Quantity

Additional Settings



Restricted items and categories

Restrictions can be set on specific products as well as product categories and subcategories. For example, let's say that you want staff members to be able to order gloves, just not one particular glove. You can adjust your settings so that specific items cannot be purchased (Fig. 7). You can also restrict entire product categories (such as gloves) and subcategories (such as latex gloves) from being purchased (Fig. 8).

Setting up departments

Corporate and facility administrators can also create different departments. Each department is assigned its own budget amount and type (weekly, monthly, quarterly or yearly) (Fig. 9). If the budget limit is exceeded, approval by the corporate user will be required before the order is processed.

Order approvers

With Role Management, you can select individual users who have the ability to approve orders (Fig. 10). Based on your preferences, these users can modify purchase orders, modify shopping carts and submit orders (Fig. 9A). They also receive email notifications when an order is ready for approval. If you prefer, settings can be adjusted so that orders must be approved by multiple levels of management before they are submitted.



Accessing budget reports

Registered users of promedsupply.com can access budget reports at the following levels:

- **Corporate:** Available reports include All Orders, Budget Chart and Facility Chart
- **Facility:** View All Orders or Department Chart reports
- **Department:** View budget reports from individual departments

Budget reports can be viewed by week, month, quarter or year. They're especially useful toward the end of the month to remind your facility of what remains in your budget.

Your ProMed territory manager is ready to tell you more and assist you with Role Management at any time.



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