



Administrators

Quick Reference Guide

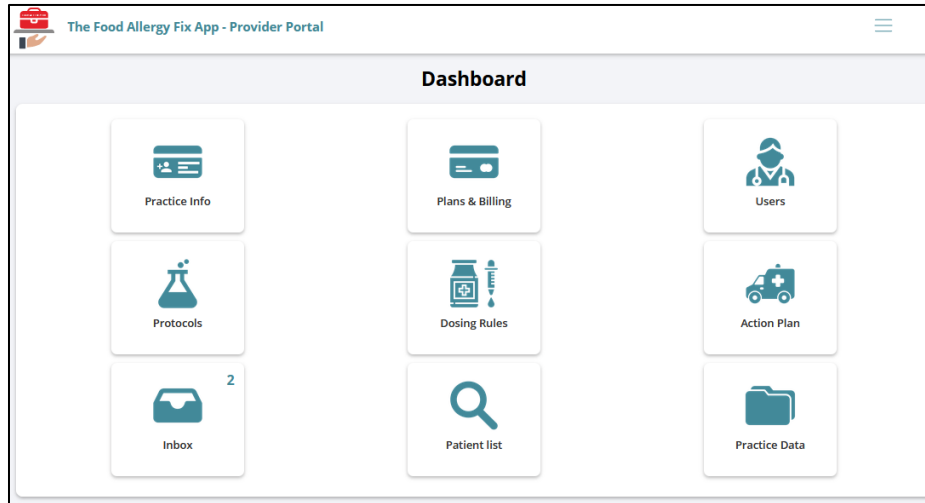
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Dashboard

When you sign into the Food Allergy Fix portal, you are taken to the portal Dashboard. From here, you will set up and manage all system activity. The administrator should define the Users (practice staff), Protocols, Dosing Rules and Action Plan before inviting any patients to install the mobile application and submit their account request. Complete the steps outlined in this document as well as in the Protocols User Guide to get started.



Practice Info

1. Review the practice name, address and phone numbers entered when the account was created. Note that the Emergency Phone number defined here is displayed in the mobile app to all patients.
2. Revise if needed.

Plans & Billing

The Plans & Billing page shows the plan your practice is currently using and allows you to choose a different plan if you find you need more or fewer protocols, manage your credit card and billing contact information, and review your billing history. Your credit card is billed automatically on the monthly anniversary of your signing up for a plan.

If you change plans, you should make that change on your anniversary date to avoid being billed for both plans. For example, if you sign up for the Bronze Plan on the 15th of June, you will be billed for that plan on the 15th of each month. If you upgrade to the Silver Plan on the 25th of August, you will then be billed for the Silver Plan on that day. On the 15th of September, the Bronze Plan will not be billed, but you are billed for both plans for the period of August 25 – September 15. To avoid this, **make all plan changes on your plan's billing date.**

To choose a different Plan:

Switching to a different plan is a two-step process: you first add the new plan and then cancel the original plan.



1. At the Plans & Billing page, review the plan selected for your practice.
2. Click the **Select Plan** button for the plan you want to use. The system checks the number of active protocols you are using and will not allow you to choose a plan that supports fewer protocols than you need.
3. Click **OK** when asked to confirm that you want to manage your plans.
4. The plan you chose is shown on the left. To sign up for this plan, click **Subscribe**. The new plan will be billed to the credit card shown here.

5. When the payment is successfully processed, you are taken back to the Dashboard.
6. Select **Plans & Billing**, and then click **Manage Billings and Payment Method** at the top of the page.

7. Click **Cancel Plan** for the Plan you want to discontinue, leaving the new plan you just added.

To manage your billing information:

1. At the Plans & Billing page, click **Manage Billings and Payment Method** at the top of the page.



2. Scroll down to the Payment Method section.

The screenshot shows the Stripe payment management page for 'Wise Prince Holdings LLC'. It includes sections for 'PAYMENT METHOD', 'BILLING INFORMATION', and 'BILLING HISTORY'. Callouts point to specific elements: 'Delete card or choose Default card' points to the three dots on the current card; 'Add a new credit card' points to the '+ Add payment method' button; 'Change billing contact information' points to the 'Update information' link; and 'Review billing history' points to the billing history table.

BILLING HISTORY		
Oct 5, 2021	\$80.00	Gold Plan (Palforzia plus 11+ cust...
Sep 7, 2021	\$70.00	Silver Plan (Palforzia plus 6 -10 c...

3. To change the billing credit card:

- Click **Add Payment Method** and enter the new credit card information (card number, expiration date, CVC number, and ZIP code).
- Click **Add**.
- In the Payment Method list, click the three dots on the card you want to remove and select **Delete**.
- If you want both cards available, click the three dots for the card you want to use as the default and select **Make Default**.

Food Allergy Fix uses Stripe for secure billing transactions. Your credit card information is not stored in the Food Allergy Fix database.

4. To change the billing contact information:

- In the Billing Information section, click **Update Information**.
- Update the billing contact's email address, address, and phone number, as needed.
- Click **Save**.

Manage Users

To add a new administrator, clinician or staff member:

1. At the Dashboard, click the **Users** tile.
2. Click the **Add** button.

The 'Add New User' form contains the following fields and options:





- User Information:**
 - First Name: Richard
 - Last Name: Martinez
 - Email: richard@felman.com
 - Password: [masked]
 - Confirm Password: [masked]
- Select Role:** Admin, Clinician, Staff
- Select Credentials:** MD
- Note:** Only Admin can modify account settings, protocols, dosing rules, or action plans. Clinicians can modify protocol assignments and make medication changes. Staff will only have read-only access to the patient database.
- Buttons:** BACK, SUBMIT



3. Enter the person's first and last names.
4. Enter the person's work email address.
5. Enter a password for this person.
6. Select the person's role in the Food Allergy Fix portal:
 - **Admin:** Has access to all system functions, including the ability to update setup (users, protocols, dosing rules, and action plan).
 - **Clinician:** Can approve or decline patients, manage patient notifications, and assign or change protocols and medications. Clinicians can view Practice Info and Users, but can't make changes.
 - **Staff:** Can view and export patient information.
7. Select the person's credentials:
 - **DO:** Doctor of Osteopathic Medicine
 - **MD:** Doctor of Medicine
 - **NP:** Nurse Practitioner
 - **PA:** Physician Assistant
8. Click **Submit**. An email is sent to the user with their password and an activation link.
9. To activate the user account yourself, click the **Activate User** Action at the Manage Users list.

To manage user accounts:

1. At the Dashboard, click the Users tile.

Manage Users								Add User 
First name	Last name	Email	Credentials	Role	Status	Actions		
Layla	Mahloof	layla@felman.com	MD	Admin	Active	 Reset Password	 Suspend User	 Edit
Richard	Martinez	richard@felman.com	MD	Clinician	Active	Reset Password	Suspend User	Edit
Ranjiv	Mastock	ranjiv@felman.com	N/A	Staff	Active	Reset Password	Suspend User	Edit
Ben	Collins	collinsben922@gmail.com	MD	Clinician	Active	Reset Password	Suspend User	Edit
Janice	Wilson	janice@felman.com	N/A	Staff	Suspended	Reset Password	Activate User	Edit

2. Perform any of the following actions to manage user accounts:
 - a. To reset a user's password, click the **Reset Password** Action for the user. An email is sent to the user with their password.
 - b. To suspend or activate a user account, click the **Suspend User** or **Activate User** Action for the user.
 - c. To change a user's name, email address, role or credentials, click the **Edit** Action for the user. Update the user's information and click **Submit**.



Dosing Rules

Use Dosing Rules to define how a patient's protocol should be adjusted under certain conditions, such as when a patient is running a fever or has started a course of antibiotics.

1. At the Dashboard, click the Dosing Rules tile.

Condition	Rule
Fever greater than 100.3F	Select Rule Skip dose until symptoms resolved, then take 50% do...
Active Asthma Symptoms	Decrease dose by 50% for 1 day, then resume usual d... Skip dose x 24 hours, then resume usual dose.
Vomiting and/or Diarrhea	Skip dose x 24 hours, then resume with 50% reduced ... Skip dose until symptoms resolved, then take 50% do... Contact your allergist for individualized guidance.
Dental/Orthodontic Treatment	Select Rule Skip dose x 24 hours, then resume usual dose.

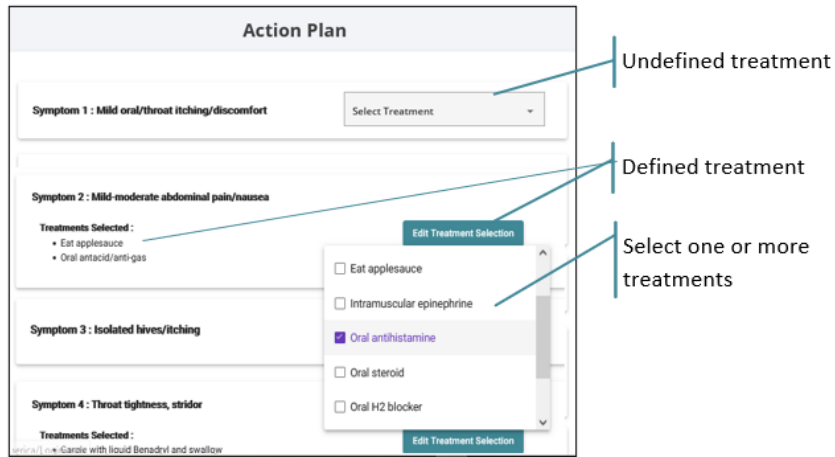
2. The Dosing Rules page lists a series of patient conditions that can affect whether a patient's protocol should be adjusted. For each condition, click the drop-down arrow and select the adjustment that should be made, if any. If none of the listed rules apply, select "Contact your allergist for individualized guidance."
3. When all rules are defined, click **Submit**.



Action Plan

Use the Action Plan to define what a patient should do if they experience a reaction after dosing, such as throat tightness or hives. The information that you define here displays to patients as instructions in the mobile app when they log various reactions.

1. At the Dashboard, click the Action Plan tile.



2. For each symptom, click the Select Treatment drop-down arrow and select the appropriate action(s) that the patient should take. Choose all that apply. If patients log the symptom, they are instructed to administer all of the treatments selected here. In addition, if one of the treatments is epinephrine, they are instructed to administer that first.
3. When treatments are defined for all symptoms, click the **Submit All** button. The treatment is displayed below the symptom.
4. To change a treatment after the Action Plan has been saved, use the **Edit Treatment Selection** button, choose the new action(s), and click **Submit All**.