



Customer Portal User Manual

EDITION 2.0.0



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I. Login and Changing your Password



Login

Username

Password

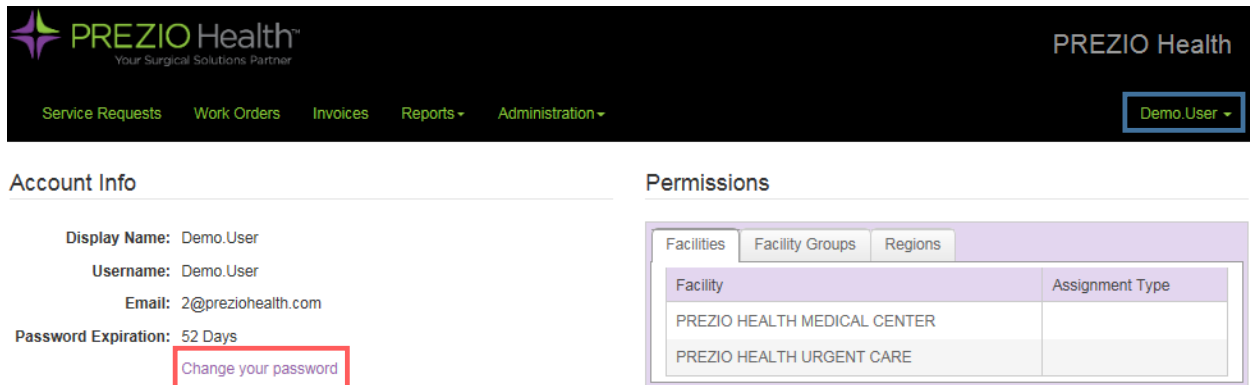
[I forgot my password](#)

To access your PREZIO Customer Portal you will go to the following URL:

<https://customer.preziohealth.com/>

Once you have accessed the home page for the Customer Portal you can login to the system using the User Name and Password provided by your system administrator.

Changing your Password



Account Info

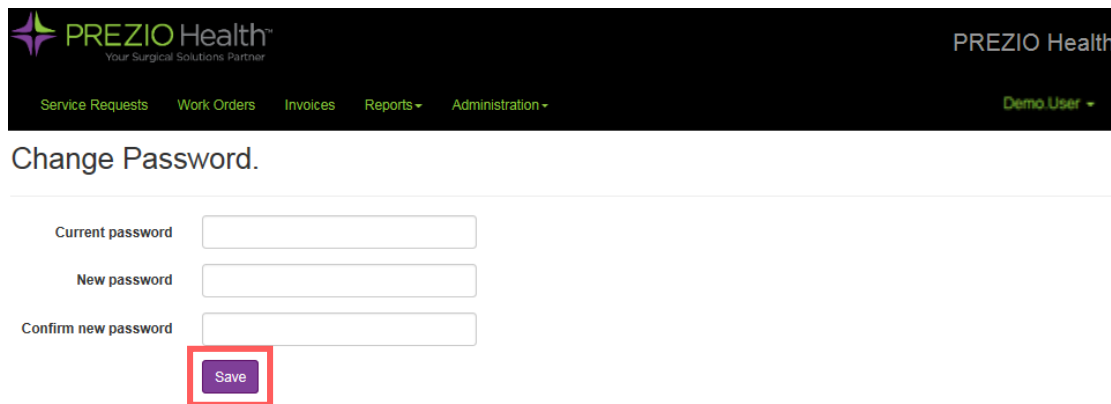
Display Name: Demo.User
 Username: Demo.User
 Email: 2@preziohealth.com
 Password Expiration: 52 Days
[Change your password](#)

Permissions

Facility	Assignment Type
PREZIO HEALTH MEDICAL CENTER	
PREZIO HEALTH URGENT CARE	

Once logged if you would like to update your password you will need to navigate to the My Account page. To do this, click on the your display name on the top right hand side of the screen (Blue Square shown above) and then select “My Account” in the drop down that follows.

This screen will allow a user to update their password by clicking “Change your password” and also allows the user to view their permissions set up for them by the account administrator.



Change Password.

Current password

New password

Confirm new password

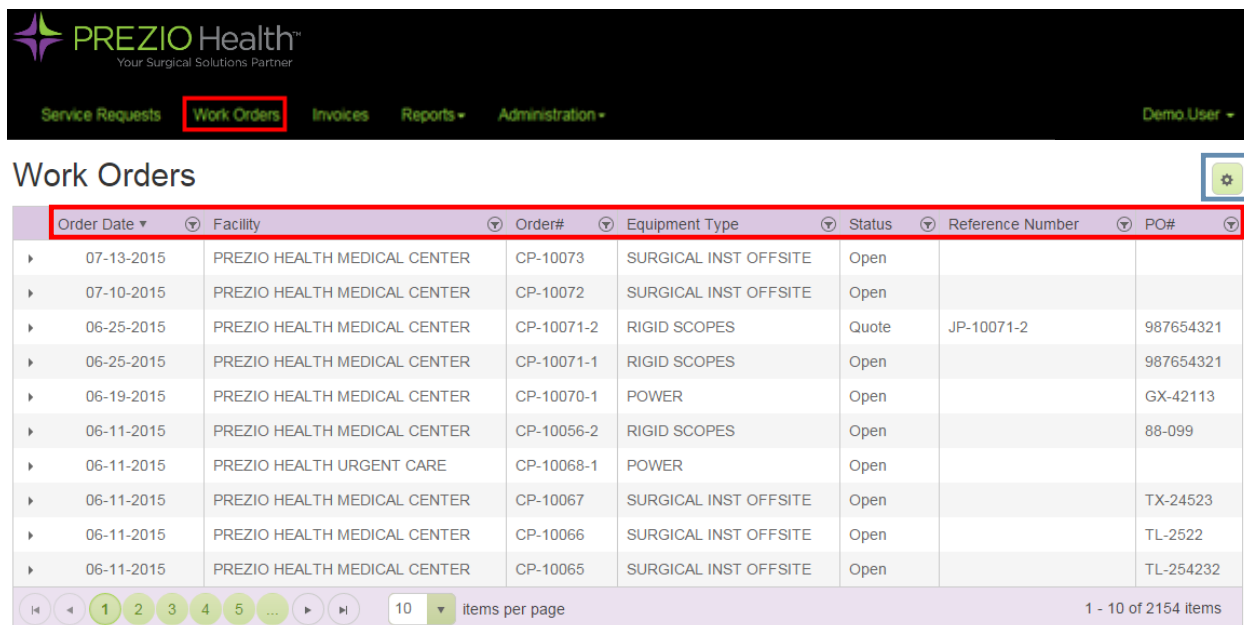
[Save](#)

After clicking “Change your password”, enter in your current password and then enter the password you would like and then confirm it. Passwords will not be updated until the save button is clicked (Red Square).

If you would like to update any other information in your profile, please contact the account administrator.

If you are an Account or Region Administrator and wish to learn how to add people to the Customer Portal, please contact PREZIO Health’s Customer Support line for instructions and assistance.

II. Work Orders



Order Date	Facility	Order#	Equipment Type	Status	Reference Number	PO#
07-13-2015	PREZIO HEALTH MEDICAL CENTER	CP-10073	SURGICAL INST OFFSITE	Open		
07-10-2015	PREZIO HEALTH MEDICAL CENTER	CP-10072	SURGICAL INST OFFSITE	Open		
06-25-2015	PREZIO HEALTH MEDICAL CENTER	CP-10071-2	RIGID SCOPES	Quote	JP-10071-2	987654321
06-25-2015	PREZIO HEALTH MEDICAL CENTER	CP-10071-1	RIGID SCOPES	Open		987654321
06-19-2015	PREZIO HEALTH MEDICAL CENTER	CP-10070-1	POWER	Open		GX-42113
06-11-2015	PREZIO HEALTH MEDICAL CENTER	CP-10056-2	RIGID SCOPES	Open		88-099
06-11-2015	PREZIO HEALTH URGENT CARE	CP-10068-1	POWER	Open		
06-11-2015	PREZIO HEALTH MEDICAL CENTER	CP-10067	SURGICAL INST OFFSITE	Open		TX-24523
06-11-2015	PREZIO HEALTH MEDICAL CENTER	CP-10066	SURGICAL INST OFFSITE	Open		TL-2522
06-11-2015	PREZIO HEALTH MEDICAL CENTER	CP-10065	SURGICAL INST OFFSITE	Open		TL-254232

Filter Criteria

**Note, Any items with a red asterisk are not filters that are enabled by default but can be enabled by clicking the gear icon (blue square)*

The work order screen will list all work orders for the facilities the account has been assigned. There are a number of different ways a user can filter this list to drill it down. Below is a brief explanation of each filter:

Order Date- This filter will allow the user to show items by date (Before, After or Exact).

Facility- Facility refers to the facility location the user would like to filter by. These are predefined by PREZIO Health and reference your PREZIO Health customer number. The list will only show the facilities that have been assigned to the account by the account Administrator.

Order#- This allows the user filter by a specific order number.

Equipment Type- This filter will allow the user to filter for equipment of a certain type.

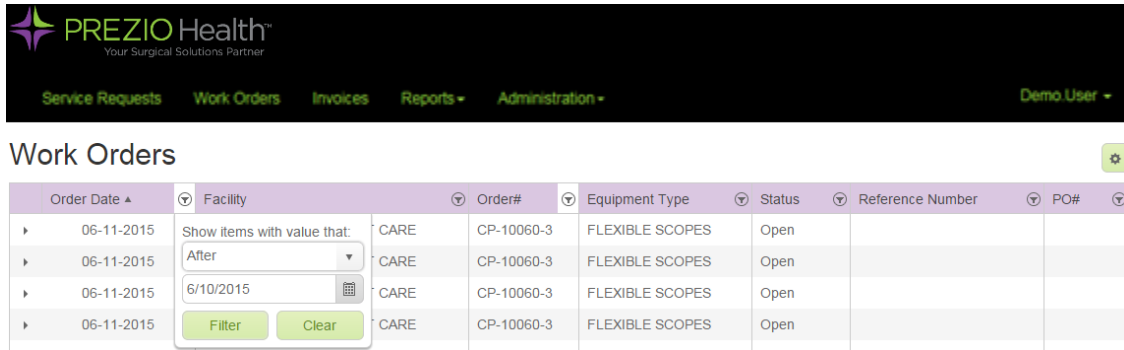
Status- This filter will allow the user to filter for all Work Orders with a certain Status.

Reference Number- Customer Reference Number is a number that is provided to the customer on their Work Order from PREZIO Health. This filter enables the user to search all instruments that are under a single Customer Reference #.

PO#- This filter refers to the Work Orders PO# and gives the user the ability to see all Work Orders attached to a specific PO#.

Serial #- This will allow the user to filter for work orders by serial number.

Filter by Order Date

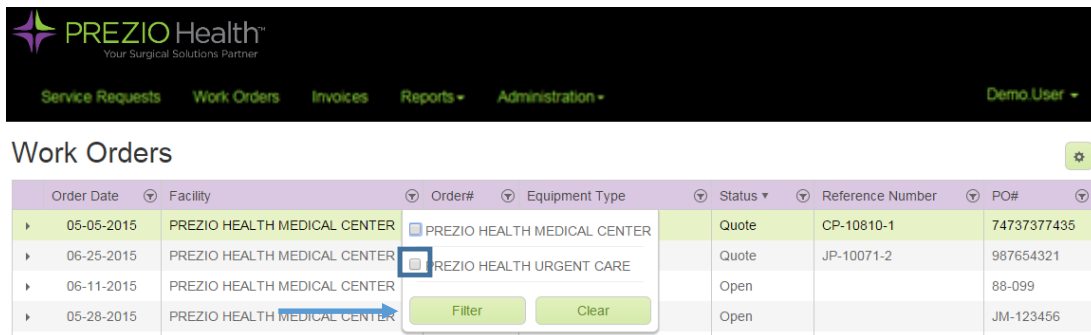


The screenshot shows the PREZIO Health interface with the 'Work Orders' section active. A filter is applied to the 'Order Date' column, set to 'After' 6/10/2015. The table displays four rows of work orders, all with an 'Open' status and 'FLEXIBLE SCOPES' equipment type.

Order Date	Facility	Order#	Equipment Type	Status	Reference Number	PO#
06-11-2015	CARE	CP-10060-3	FLEXIBLE SCOPES	Open		
06-11-2015	CARE	CP-10060-3	FLEXIBLE SCOPES	Open		
06-11-2015	CARE	CP-10060-3	FLEXIBLE SCOPES	Open		
06-11-2015	CARE	CP-10060-3	FLEXIBLE SCOPES	Open		

The above search was filtered to “After” 6/10/2015. Therefore the only Work Orders that appear are Work Orders that fall after the preset search date. Order Date can also filter results by “Before” & “Exact”.

Filter by Facility



The screenshot shows the PREZIO Health interface with the 'Work Orders' section active. A filter is applied to the 'Facility' column, set to 'PREZIO HEALTH MEDICAL CENTER'. The table displays four rows of work orders, all with a 'Quote' status.

Order Date	Facility	Order#	Equipment Type	Status	Reference Number	PO#
05-05-2015	PREZIO HEALTH MEDICAL CENTER	CP-10810-1		Quote	CP-10810-1	74737377435
06-25-2015	PREZIO HEALTH MEDICAL CENTER	JP-10071-2		Quote	JP-10071-2	987654321
06-11-2015	PREZIO HEALTH MEDICAL CENTER			Open		88-099
05-28-2015	PREZIO HEALTH MEDICAL CENTER			Open		JM-123456

When filtering by Facility, only Work Orders pertaining to that Facility are displayed. The user can select one or more facilities at a time to filter by.

Filter by Order#

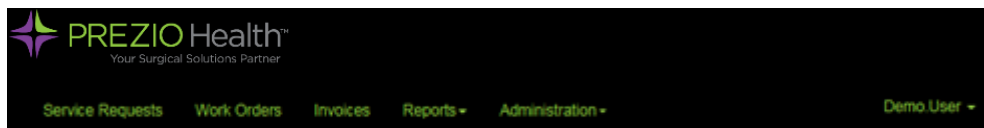


Work Orders

Order Date	Facility	Order#	Equipment Type	Status	Reference Number	PO#	
06-11-2015	PREZIO HEALTH URGENT CARE	CP-10060-3	Show items with value that: Exact Match CP-10060-3 Filter Clear	Open			
06-11-2015	PREZIO HEALTH URGENT CARE	CP-10060-3		Open			
06-11-2015	PREZIO HEALTH URGENT CARE	CP-10060-3		Open			
06-11-2015	PREZIO HEALTH URGENT CARE	CP-10060-3		Open			
06-11-2015	PREZIO HEALTH URGENT CARE	CP-10060-3		FLEXIBLE SCOPES	Open		
06-11-2015	PREZIO HEALTH URGENT CARE	CP-10060-3		FLEXIBLE SCOPES	Open		
06-11-2015	PREZIO HEALTH URGENT CARE	CP-10060-3		FLEXIBLE SCOPES	Open		
06-11-2015	PREZIO HEALTH URGENT CARE	CP-10060-3		FLEXIBLE SCOPES	Open		
06-11-2015	PREZIO HEALTH URGENT CARE	CP-10060-3		FLEXIBLE SCOPES	Open		
06-11-2015	PREZIO HEALTH URGENT CARE	CP-10060-3		FLEXIBLE SCOPES	Open		

The above filter was set to Exact and the Order# (CP-10060-3). Therefore the only Work Orders that appear are Work Orders that match that exact order #. Order can also filter by “Contains” & “Starts With” which allow for much broader searches.

Filter by Equipment Type

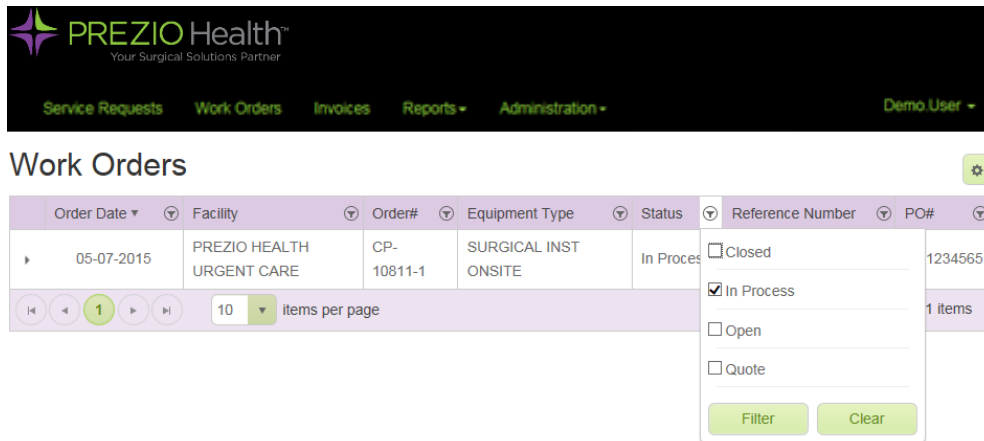


Work Orders

Order Date	Facility	Order#	Equipment Type	Status	Reference Number	PO#
06-11-2015	PREZIO HEALTH MEDICAL CENTER	CP-10059-3	<input type="checkbox"/> FLEXIBLE SCOPES <input checked="" type="checkbox"/> FLEXIBLE SCOPES <input type="checkbox"/> OTHER <input type="checkbox"/> POWER <input type="checkbox"/> RIGID SCOPES <input type="checkbox"/> SURGICAL INSTRUMENTS Filter Clear			43-234
06-11-2015	PREZIO HEALTH URGENT CARE	CP-10060-3		FLEXIBLE SCOPE		
06-11-2015	PREZIO HEALTH URGENT CARE	CP-10060-3		FLEXIBLE SCOPE		
06-11-2015	PREZIO HEALTH URGENT CARE	CP-10060-3		FLEXIBLE SCOPE		
06-11-2015	PREZIO HEALTH URGENT CARE	CP-10060-3		FLEXIBLE SCOPE		

The above search was filtered by the Flexible Scopes equipment type, therefore the user will only see work orders pertaining to that type of equipment.

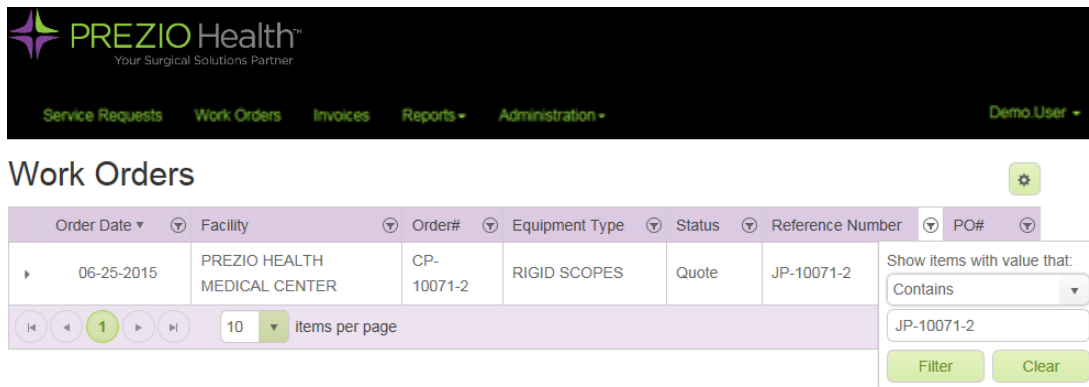
Filter by Status



The screenshot shows the PREZIO Health Work Orders interface. The top navigation bar includes "Service Requests", "Work Orders", "Invoices", "Reports", and "Administration". The user is logged in as "Demo User". The main content area is titled "Work Orders" and displays a table with the following columns: Order Date, Facility, Order#, Equipment Type, Status, Reference Number, and PO#. The table contains one row with the following data: Order Date: 05-07-2015, Facility: PREZIO HEALTH URGENT CARE, Order#: CP-10811-1, Equipment Type: SURGICAL INST ONSITE, Status: In Process, Reference Number: 1234565, and PO#: 1234565. A filter dropdown menu is open over the Status column, showing options: Closed, In Process (checked), Open, and Quote. The "Filter" and "Clear" buttons are visible at the bottom of the dropdown.

The above search was filtered by the “In Progress” Status, this will display all work orders that match this status. Status can also be filtered by “Closed”, “Open”, & “Quote”.

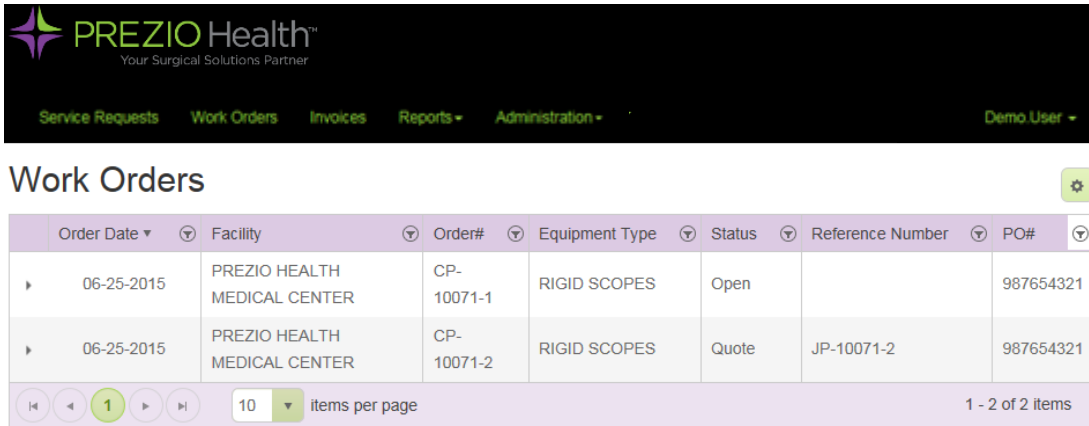
Reference Number



The screenshot shows the PREZIO Health Work Orders interface. The top navigation bar includes "Service Requests", "Work Orders", "Invoices", "Reports", and "Administration". The user is logged in as "Demo User". The main content area is titled "Work Orders" and displays a table with the following columns: Order Date, Facility, Order#, Equipment Type, Status, Reference Number, and PO#. The table contains one row with the following data: Order Date: 06-25-2015, Facility: PREZIO HEALTH MEDICAL CENTER, Order#: CP-10071-2, Equipment Type: RIGID SCOPES, Status: Quote, Reference Number: JP-10071-2, and PO#: 1234565. A filter dropdown menu is open over the Reference Number column, showing options: Contains, Exact, and Starts With. The "Contains" option is selected. The text "Show items with value that:" is visible above the dropdown. The "Filter" and "Clear" buttons are visible at the bottom of the dropdown.

The above search was filtered to look for any Reference number that contains “JP-10071-2”. Reference number can also be filtered using “Exact” & “Starts With”.

PO#

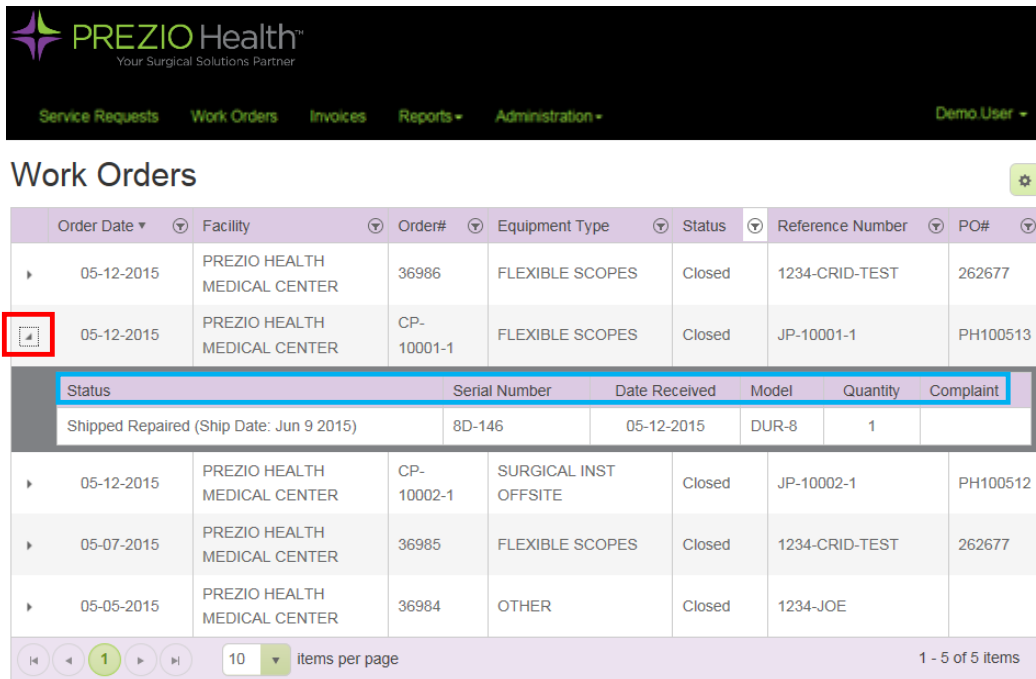


The screenshot shows the PREZIO Health user interface. At the top, there is a navigation bar with the following items: Service Requests, Work Orders, Invoices, Reports, Administration, and Demo User. Below this is the 'Work Orders' section, which contains a table of work orders. The table has the following columns: Order Date, Facility, Order#, Equipment Type, Status, Reference Number, and PO#. Two work orders are displayed, both with a PO# of 987654321. The first work order has an Order Date of 06-25-2015, Facility of PREZIO HEALTH MEDICAL CENTER, Order# of CP-10071-1, Equipment Type of RIGID SCOPES, and Status of Open. The second work order has an Order Date of 06-25-2015, Facility of PREZIO HEALTH MEDICAL CENTER, Order# of CP-10071-2, Equipment Type of RIGID SCOPES, Status of Quote, and Reference Number of JP-10071-2. Below the table is a pagination control showing '10 items per page' and '1 - 2 of 2 items'.

Order Date	Facility	Order#	Equipment Type	Status	Reference Number	PO#
06-25-2015	PREZIO HEALTH MEDICAL CENTER	CP-10071-1	RIGID SCOPES	Open		987654321
06-25-2015	PREZIO HEALTH MEDICAL CENTER	CP-10071-2	RIGID SCOPES	Quote	JP-10071-2	987654321

The above search was filtered to look for any PO# that contains “987654321”. PO# can also be filtered using “Exact” & “Starts With”.

Work Order Details

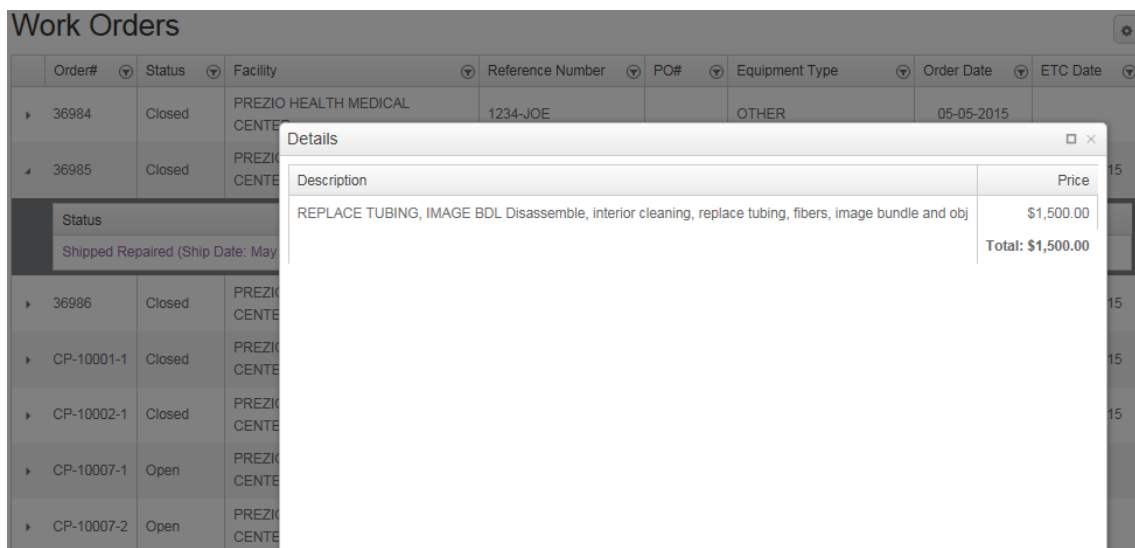


Order Date	Facility	Order#	Equipment Type	Status	Reference Number	PO#	
05-12-2015	PREZIO HEALTH MEDICAL CENTER	36986	FLEXIBLE SCOPES	Closed	1234-CRID-TEST	262677	
05-12-2015	PREZIO HEALTH MEDICAL CENTER	CP-10001-1	FLEXIBLE SCOPES	Closed	JP-10001-1	PH100513	
		Status	Serial Number	Date Received	Model	Quantity	Complaint
		Shipped Repaired (Ship Date: Jun 9 2015)	8D-146	05-12-2015	DUR-8	1	
05-12-2015	PREZIO HEALTH MEDICAL CENTER	CP-10002-1	SURGICAL INST OFFSITE	Closed	JP-10002-1	PH100512	
05-07-2015	PREZIO HEALTH MEDICAL CENTER	36985	FLEXIBLE SCOPES	Closed	1234-CRID-TEST	262677	
05-05-2015	PREZIO HEALTH MEDICAL CENTER	36984	OTHER	Closed	1234-JOE		

On the left side of each work order there is a small arrow, this arrow indicates that this field can be expanded upon by clicking on it. Anywhere within the system that this arrow appears, it will allow the user to further expand the field to see more granular details on the selected.

Across the top of the expanded details are the following fields; **Status, Serial Number, Date Received, Model, Quantity, Complaint.**

Clicking on the status in the details will bring up more information in a popup window including: Description of the repair, Price each repair and the total cost of the repair.



Order#	Status	Facility	Reference Number	PO#	Equipment Type	Order Date	ETC Date
36984	Closed	PREZIO HEALTH MEDICAL CENTER	1234-JOE		OTHER	05-05-2015	
36985	Closed	PREZIO HEALTH MEDICAL CENTER					
36986	Closed	PREZIO HEALTH MEDICAL CENTER					
CP-10001-1	Closed	PREZIO HEALTH MEDICAL CENTER					
CP-10002-1	Closed	PREZIO HEALTH MEDICAL CENTER					
CP-10007-1	Open	PREZIO HEALTH MEDICAL CENTER					
CP-10007-2	Open	PREZIO HEALTH MEDICAL CENTER					

Description	Price
REPLACE TUBING, IMAGE BDL Disassemble, interior cleaning, replace tubing, fibers, image bundle and obj	\$1,500.00
Total:	\$1,500.00

Order#	Status	Facility	Reference Number	PO#	Equipment Type	Order Date	ETC Date
CP-10075	Open	PREZIO HEALTH MEDICAL CENTER		PO-1234	SURGICAL INST OFFSITE	07-20-2015	
CP-10076	Open	PREZIO HEALTH MEDICAL CENTER		PO-12345	SURGICAL INST OFFSITE	07-20-2015	
CP-10074	Open	PREZIO HEALTH MEDICAL CENTER			SURGICAL INST OFFSITE	07-16-2015	
CP-10073	Open	PREZIO HEALTH MEDICAL CENTER			SURGICAL INST OFFSITE	07-13-2015	

Status	Serial Number	Date Received	Model	Quantity	Complaint
In Process	961036	07-10-2015	502-540-045	1	

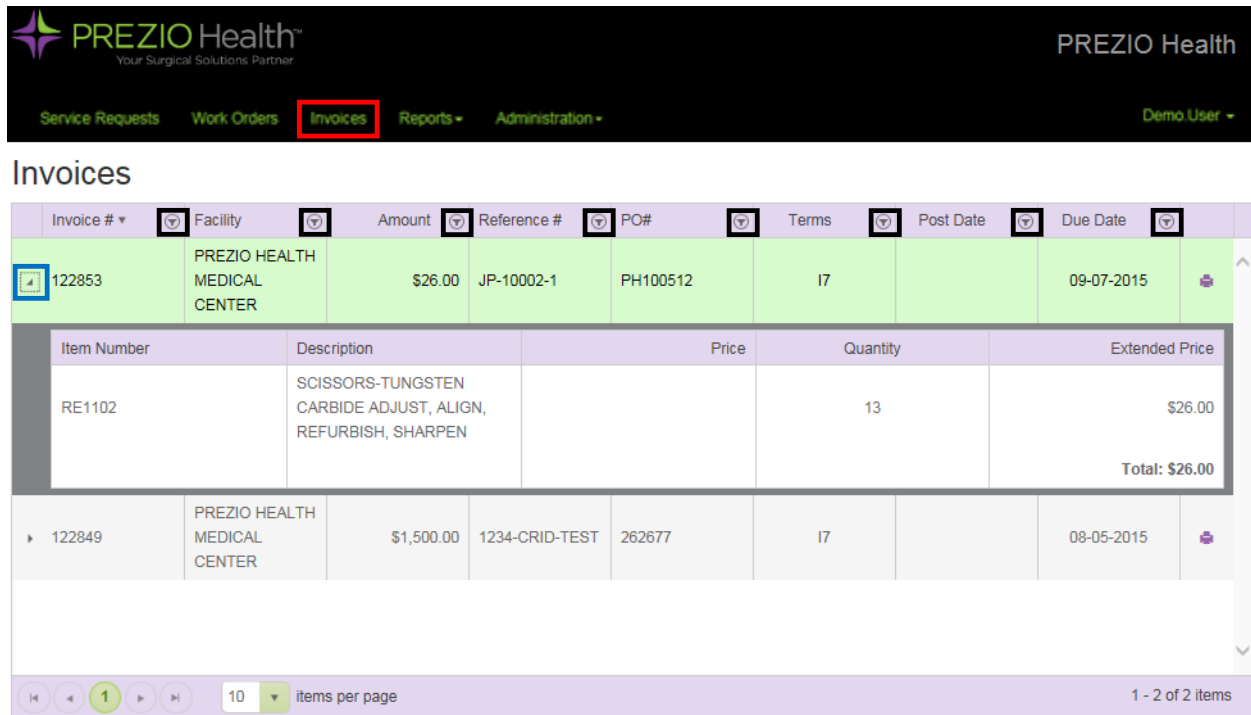
CP-10072	Open	PREZIO HEALTH MEDICAL CENTER			SURGICAL INST OFFSITE	07-10-2015	
CP-10071-1	Open	PREZIO HEALTH MEDICAL CENTER		987654321	RIGID SCOPES	06-25-2015	
CP-10071-2	Quote	PREZIO HEALTH MEDICAL CENTER	JP-10071-2	987654321	RIGID SCOPES	06-25-2015	
CP-10070-1	Open	PREZIO HEALTH MEDICAL CENTER		GX-42113	POWER	06-19-2015	
CP-10053	Open	PREZIO HEALTH MEDICAL CENTER		456654	SURGICAL INST OFFSITE	06-11-2015	
CP-10054-1	Open	PREZIO HEALTH MEDICAL CENTER		TY-24235	OTHER	06-11-2015	

1 2 3 4 5 ... 10 items per page 1 - 10 of 2157 items

At the highest level, statuses shown are as follows:


- ✦ **Open:** Equipment is en-route and has not yet been received by our repair facility.
- ✦ **Quote:** We are evaluating the equipment to provide an estimate.
- ✦ **In Process:** We have received approval to begin repair and the repair is in process.
- ✦ **Closed:** Repair is complete and customer has been invoiced for repair.
- ✦ **Complete:** Repair is complete.
- ✦ **Billing Data Needed:** Repair is complete. Pending PO to invoice customer and close order.

III. Invoices



Invoice #	Facility	Amount	Reference #	PO#	Terms	Post Date	Due Date														
122853	PREZIO HEALTH MEDICAL CENTER	\$26.00	JP-10002-1	PH100512	I7		09-07-2015														
<table border="1"> <thead> <tr> <th>Item Number</th> <th>Description</th> <th>Price</th> <th>Quantity</th> <th>Extended Price</th> </tr> </thead> <tbody> <tr> <td>RE1102</td> <td>SCISSORS-TUNGSTEN CARBIDE ADJUST, ALIGN, REFURBISH, SHARPEN</td> <td></td> <td>13</td> <td>\$26.00</td> </tr> <tr> <td colspan="4"></td> <td>Total: \$26.00</td> </tr> </tbody> </table>		Item Number	Description	Price	Quantity	Extended Price	RE1102	SCISSORS-TUNGSTEN CARBIDE ADJUST, ALIGN, REFURBISH, SHARPEN		13	\$26.00					Total: \$26.00					
Item Number	Description	Price	Quantity	Extended Price																	
RE1102	SCISSORS-TUNGSTEN CARBIDE ADJUST, ALIGN, REFURBISH, SHARPEN		13	\$26.00																	
				Total: \$26.00																	
122849	PREZIO HEALTH MEDICAL CENTER	\$1,500.00	1234-CRID-TEST	262677	I7		08-05-2015														

Filter Criteria

The Invoice screen can be filtered in many different ways. Each column should have the following icon.  Clicking on these icons will allow the user to filter the data listed in the invoice section to only show what is needed.

Each invoice will have a small arrow on the left hand side (orange rectangle). This will expand the field to provide more granular details on the item selected.

Send Billing Inquiries to:

PREZIO Health
 25175 Dequindre Road
 Madison Heights, MI 48071-4240

Phone: 1-855-667-4831

Email: accounts.receivable@preziohealth.com

IV. Service Request

The Service Request screen will show a list of currently submitted service requests that have been created within customer portal only. On the right hand side of each submitted Service Request is a Cancel Request button (Red Rectangle below), this will send a request to PREZIO Health to cancel the request if possible. If the service request is able to be canceled, the canceled checkbox will be checked on the service request once we successfully cancel the order (Orange Square below).

Submit a new Service Request





The first step in entering in a new Service Request form is to click on “New Request”. Once the best course of action is determined, enter the appropriate information from the next screen.

(See example image of a service request form on the next page)

- ✦ PO Number
- ✦ Shipping Type (FedEx Shipping or PREZIO Pickup)
- ✦ Whether you are:
 - Returning a loaner
 - In need of a loaner
- ✦ Whether the item has been decontaminated or not.
- ✦ Equipment Category:
 - Endoscopic Equipment
 - Equipment Type
 - Flexible Scope
 - Power
 - Rigid Scope
 - Video
 - Other
 - Service Type
 - Department
 - Surgical Equipment
 - Any helpful comments that may expedite the repair.

Choosing a FedEx option will allow the user to print a shipping label, PREZIO Pickup will request a PREZIO employee to pick up the items.

Service Requests

Request Numb...	Request Date	Requestor	Loaner Reque...	Shipping Method	Tracking Number	Cancel...	
10074	07-16-2015	Joe Myers	<input type="checkbox"/>	FedEx 2 Day	794643915591	<input type="checkbox"/>	
10073	07-13-2015	Joe Myers	<input type="checkbox"/>	FedEx 2 Day	794643648128	<input checked="" type="checkbox"/>	
10072	07-10-2015	Nathan Loosevelt	<input type="checkbox"/>	FedEx Ground	794643542300	<input type="checkbox"/>	
10071	06-25-2015	John Poston	<input type="checkbox"/>	PREZIO Pickup	Prezio Pickup	<input checked="" type="checkbox"/>	

Request Details

Facility	Contact Name	Phone	Email
<input type="text" value="-- Select Facility --"/>	<input type="text" value="Demo.User"/>	<input type="text"/>	<input type="text" value="2@preziohealth.com"/>

Address

Address 2

City	State	Zip Code
<input type="text"/>	<input type="text"/>	<input type="text"/>

Shipping Method	PO Number	<input type="checkbox"/> Returning Loaner <input type="checkbox"/> Requesting Loaner <input type="checkbox"/> Decontaminated
<input type="text" value="-- Select Shipping Method --"/>	<input type="text"/>	

Equipment Category

Item Information

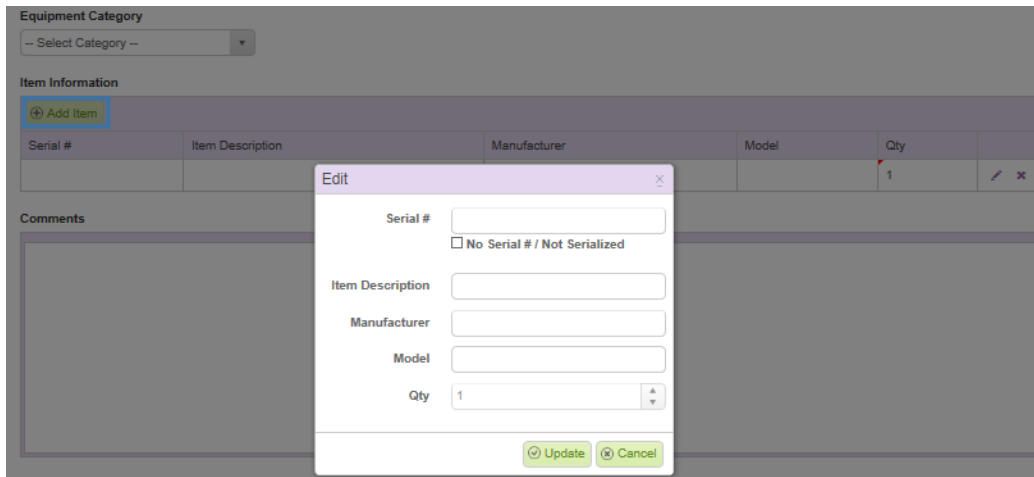
[+ Add Item](#)

Serial #	Item Description	Manufacturer	Model	Qty

Comments

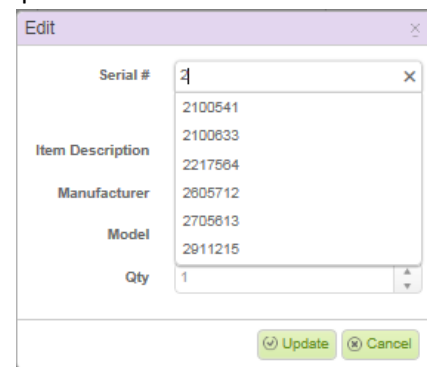
Notifications

Adding Items to a Service Request



To add an Item to the Service Request, click on the green “Add Item” button. A popup window will appear asking for the items Serial Number, if the item in question has previously been entered it will appear in a recently entered list once the user starts typing. If the user is entering in a non-serialized item then **“No Serial Number”** will need to be checked.

Repeat the above step until all items have been added that are being sent for repair.



Notifications

If the user would like to notify someone a specific user that the request has been submitted, start typing their name into the “Notifications” section and select the user from the list that appears. The last step is the comments section, this is for any helpful comments that might expedite the repair process. Once finished entering in the requested information, clicking


“Submit” will submit the service request for processing.

Shipping Information – Confirmation & Tracking

After the service request has been submitted a confirmation page will appear. This page will display a printable confirmation sheet which includes the details of the request, Request Number & the customer's Account Number. If a FedEx shipping option is chosen there will be 2 more tabs on this screen, Tracking & View/Print Label. Please print a copy and include the page with your order, It is recommended that a copy be printed for internal records during this process as well.

Shipment Information
□ ×

Confirmation
Tracking
View/Print Label



Confirmation for Request #10081

Details of the request are included below. Please print a copy of this page to include with the order.

Work Order: CP-10081

Request Detail

Request #10081
Date 7/21/2015 9:23:29 AM

Equipment Type	Loaner Return	Loaner Requested	Decontaminated	PO#
Flexible Scope	Yes	No	Yes	PO-12345

Order Comments:

Line Items:

Serial Number	Item Name	Manufacturer	Model	Quantity
954231	Arthroscope	Arthrex	AR-3350	1

Account Information

Account No. 100000606

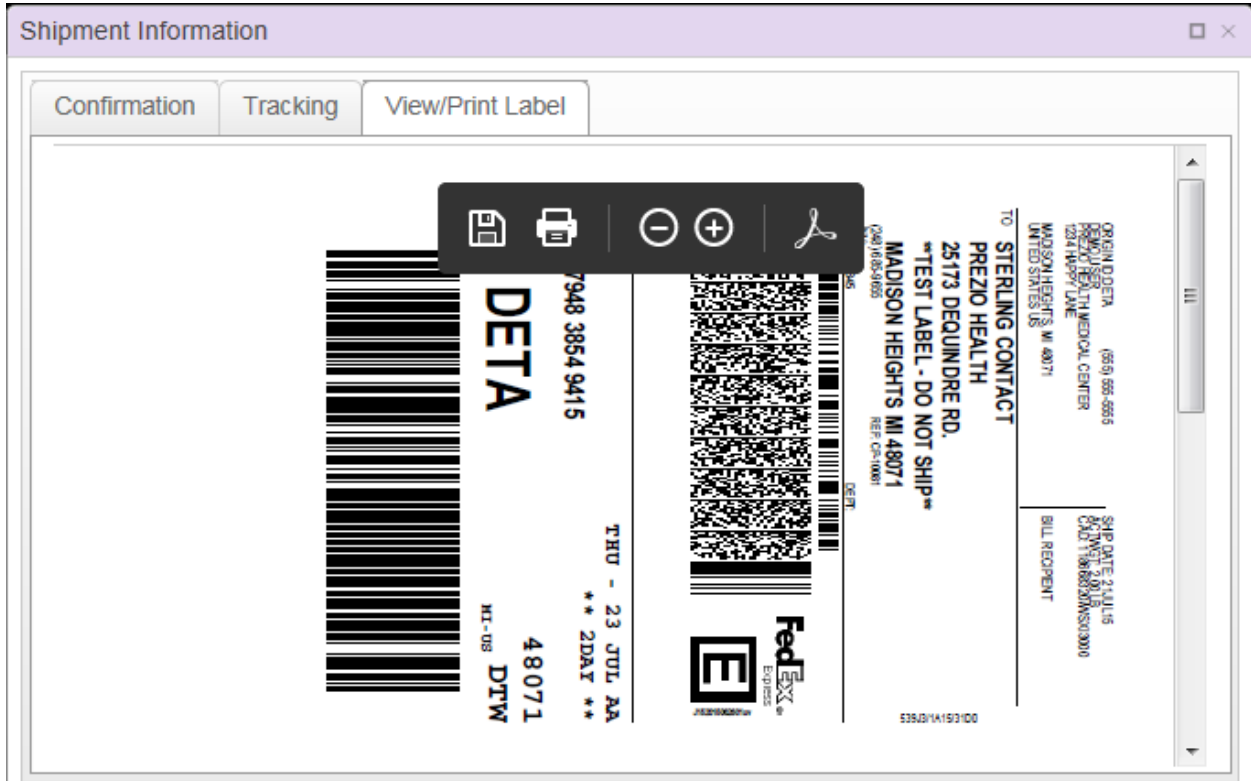
Facility PREZIO HEALTH MEDICAL CENTER 1234 HAPPY LANE MADISON HEIGHTS, MI 48071	Contact Demo.User (555) 555-5555 noreply@preziohealth.com
-----------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------

Tracking a Shipped Item

The tracking page will provide quick access to the FedEx shipping details, this page will display details on where the shipment currently is and if it has been delivered yet or not.

Viewing or Printing a Shipping Label

Click on the “View/Print Label” tab to print a copy of the shipping label.



V. Reports



There are 2 reports to choose from, Facility Summary Report & Repair Trend Report. Each report will generate based on the information that is entered in.

Facility Summary Report - The Facility Report is a table based report that provides historical data. This report will provide the following fields.

Facility Name – Facility name

Ship to # – PREZIO Health customer number

Month-Year – Expandable field to show all items for a particular month and year

Asset Category – Breaks up repairs by segment (Flexible Scope, Power, etc.)

Asset Type – Type of instrument being repaired

Model # – Instrument model number

Serial # – Instrument Serial Number

Customer PO # - PO# provided to PREZIO Health

Service – PREZIO Health cost for repair

Repair Trend Report – The repair trend report provides a bar graph view of the cost in repairs by month. The report also gives the user the ability to look at multiple facilities within the organization and see there cumulative breakdown within the provided graph.

Exporting Data

Both reports can be viewed, exported and saved in many different formats. The formats that can be exported are:

PDF; Excel; Word

