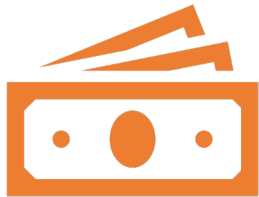


A Toolkit for Implementation

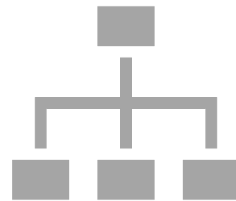
# Membership Pharmacy Model



# Table of Contents



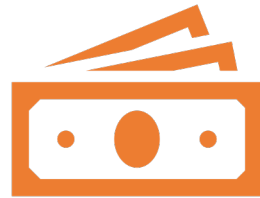
**Billing:** Individuals and Companies



**Technology:** Customer Relation Management (CRM) and Team Management Software



**Shipping:** Technology and Workflow



**Billing:** Individuals and  
Companies

# Recurring Billing Platform

- **Membership Pharmacy Models** require recurring billing of individuals (i.e., patients) or organizations (i.e., employer groups)
- **Recurring billing software** is used by many organizations to manage their subscription-based businesses (e.g., fitness centers, car washes, food delivery companies)
- Selection of a **recurring billing software** platform is based on the unique needs of the pharmacy, and may include things like:
  - Number of transactions per month
  - Types of payment collected
  - Volume of members

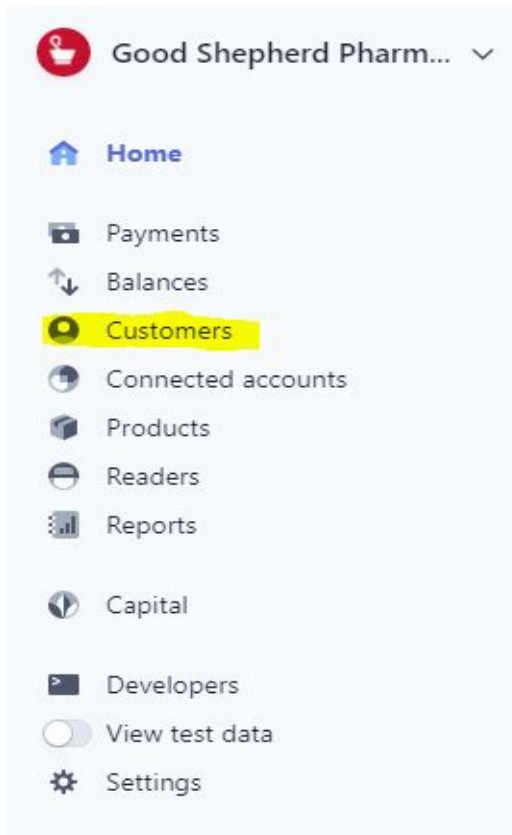
# Case Study: Recurring Billing Platform

- **Case Example: Stripe©**
  - Good Shepherd Pharmacy used Stripe for their **Membership Pharmacy Model**
  - In the following pages we will outline how Stripe© can be applied to a Membership Pharmacy for billing

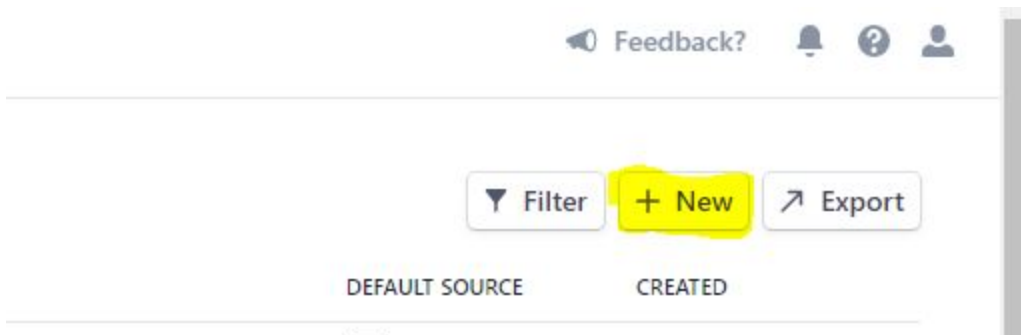
# Stripe (Billing Platform)

## ADD NEW CUSTOMER

Click on Customers on right hand side of screen



1.) Then click on + New on right side of screen:



2.) Add in Name, email, Description (name again), Address and Phone number in each field and select add customer (blue box on bottom right of box)

The image shows a 'Add customer' form with the following sections and fields:

- Add customer** (Section Header)
- Account information** (Section Header)
  - Name**: Text input field containing 'Jane Doe'.
  - Account email**: Text input field containing 'jane@example.com'.
  - Description**: Text input field (empty).
- Billing information** (Section Header, expanded)
  - Billing email**: Radio button selection with  next to 'Same as account email'.

At the bottom right of the form are two buttons: 'Cancel' and 'Add customer'.

3.) Now you have created a profile to access to go into and add memberships and payment methods. Double click on patient to access full profile

**Customers** Filter + New Export

<input type="checkbox"/>	EMAIL ✨	DESCRIPTION ✨	DEFAULT SOURCE	CREATED
<input type="checkbox"/>	test@test.com	test	—	Aug 26, 10:07 AM

4.) Create and add subscriptions to patient: click create subscription

**Subscriptions** + Create subscription

No subscriptions

5.) Add Payment Method : Click + Add Card

**Payment methods** + Add card ...

No payment methods

Fill in card number , expiry date and CVC or CVV #

Add a card

Card number MM / YY CVC

> More options

Cancel Add card



6.) Add products for memberships: Click drop down box find product and select the products needed for each customer

### Pricing

PRODUCT	QTY	TC
<input type="text" value="Find or add a product..."/>	<input type="text" value="1"/>	

[Add product](#)

[Add coupon](#)

[Add default tax](#)

[Add trial](#)

Then Click start subscription (blue box in top right hand corner)

### Summary

FIRST INVOICE


**\$25.00**

Bills immediately

# EDIT PROFILE

## 1.) Select edit details

### Details

 Edit details

#### ACCOUNT INFORMATION

Name  
test

Email  
test@test.com

Description  
test


ID  
cus\_HuEgsU2TMr1sSd

Created  
Aug 26, 2020, 10:07 AM

Language  
English

#### BILLING INFORMATION

Send emails to  
test@test.com


Billing details  
111 Baker St  
Memphis , TN 37128 US   
(901) 555-5555

Next invoice number  
8DAED435-0002

Tax IDs  
No tax IDs

Tax status  
Taxable

#### SHIPPING INFORMATION

Shipping details  
test  
111 Baker St  
Memphis , TN 37128 US   
(901) 555-5555

The new box will open up and here you can edit patient name, address, email and phone number and then click blue box at the end to update

# ADD A CREDIT

If someone doesn't need a refund (takes 7-10 business days) offer credit that will be applied to the next transaction

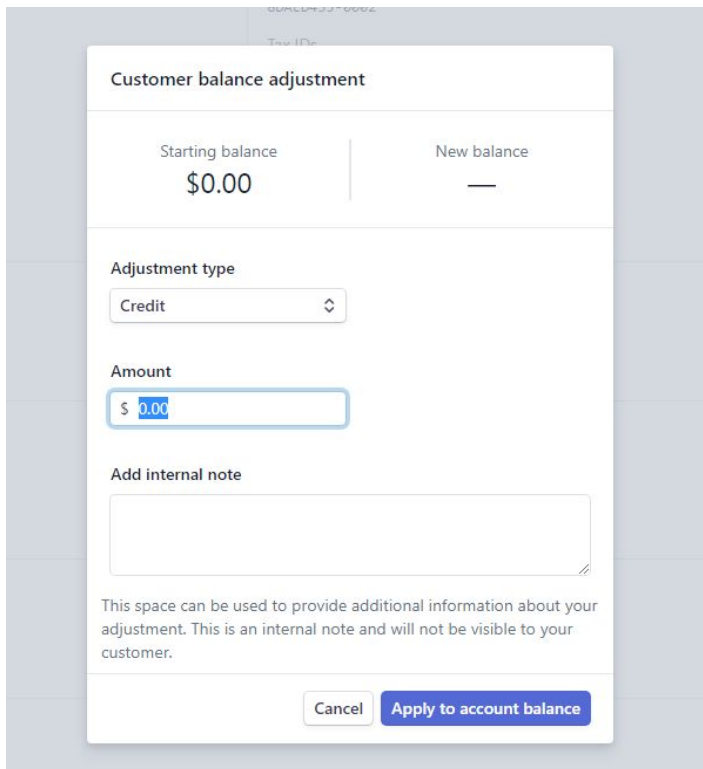
1.) Click + add balance adjustment

Customer balance

+ Add balance adjustment

\$0.00 USD

2.) Add amount, note (why credit is given) and click apply to account



The screenshot shows a modal window titled "Customer balance adjustment". It contains the following fields and controls:

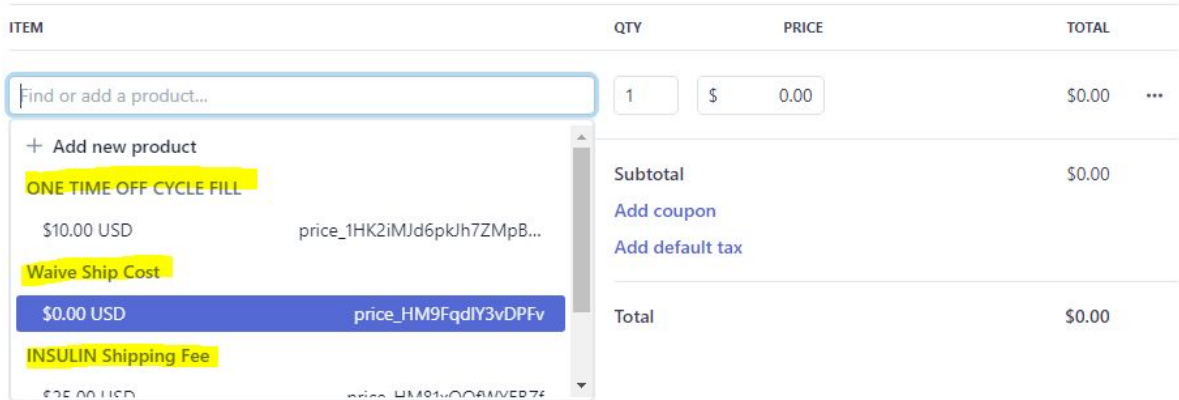
- Starting balance:** \$0.00
- New balance:** —
- Adjustment type:** A dropdown menu with "Credit" selected.
- Amount:** A text input field containing "\$ 0.00".
- Add internal note:** A large text area for notes.
- Instructions:** "This space can be used to provide additional information about your adjustment. This is an internal note and will not be visible to your customer."
- Buttons:** "Cancel" and "Apply to account balance".

# ADD A PENDING INVOICE

1.) Click on + Create Invoice



2.) Select if it is a One time off cycle fill, waive shipping, shipping fee or insulin shipping



Memo

3.) Once you select whatever shipping fee you click on "ADD ITEM" then type "meds" and under price put whatever med cost if any...if there is no med cost do not click "add item" you will only need the shipping fee. Make sure your total is correct.

Items

ITEM	QTY	PRICE	TOTAL
Standard Shipping Fee	1	\$10.00	\$10.00
meds	1	\$ 2.50	\$2.50
Add item	Subtotal		\$12.50
	Add coupon		
	Add default tax		
	Total		\$12.50

4.) Scroll down to where it says "Payment Method" you will select the option "Email invoices to the customer to pay manually" under payment due you

will put in how many days do you want for it to be charged..We would basically do this just for batch when we are doing check-in-ready(pending payments to set up to run at end of batch)

5.) After you add the due date you just click the X on the top left corner.

X | Create an invoice

---

Thanks for your business!

### Payment method

---

Automatically charge a payment method on file

---

**Email invoices to the customer to pay manually**  
Set your payment preferences, and we'll take care of the rest.



Payment due

days after invoice is sent

Invoice payment page

Include a Stripe-hosted link to an invoice payment page in the invoice email

Payment methods

  [Manage](#)

---

6.)After clicking on the X it should say “draft” with your total beside it ..THIS IS TO CREATE A PENDING INVOICE

**36A1700D-0009** for \$12.50 Draft INVOICE 

Last saved 13 minutes ago

[+ Add note](#) [Edit draft](#) [Send invoice](#) [Charge customer](#) [...](#)

7.) TO GO AHEAD AND CHARGE PATIENT... instead of clicking the second option you will click “Automatically charge a payment method in file” then click “Charge customer” on the top left corner . Make sure your total is right before you charge.

Draft saved 14 seconds ago **Charge customer** ..

Standard shipping fee	1	\$10.00	\$10.00	...
-----------------------	---	---------	---------	-----

---

[Add item](#)

Subtotal	\$10.00
<a href="#">Add coupon</a>	
<a href="#">Add default tax</a>	

---



<b>Total</b>	<b>\$10.00</b>
--------------	----------------

**Memo**

Thanks for your business!

**Payment method**

**Automatically charge a payment method on file**



 ... 4078 

**Email invoices to the customer to pay manually**  
Set your payment preferences, and we'll take care of the rest.

8.) Click “Charge Customer” again

Charge customer for invoice

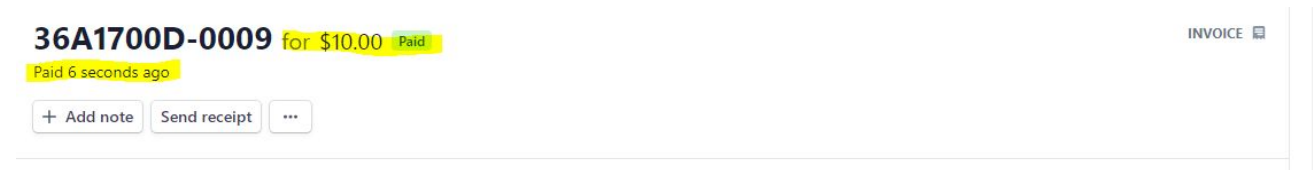
**Amount due**  
\$10.00 USD

**Payment method**  
 ... 4078 06 / 2022 

**Add internal note**  
Add a note...

9.) It should say "Paid" if the payment goes through. If it doesn't go through you will not send until they pay. Make a gold task in glip to track transaction and notify patient by text or phone call to make arrangements on past due Amount

Paid Example:



The screenshot displays a payment confirmation interface. At the top left, the text "36A1700D-0009" is shown in bold, followed by "for \$10.00" and a yellow "Paid" status indicator. Below this, a yellow banner reads "Paid 6 seconds ago". To the right, the word "INVOICE" is visible with a small icon. At the bottom, there are three buttons: "+ Add note", "Send receipt", and a three-dot menu icon.

Denied Example:

# REFUND

Remember you can offer a refund or credit. Refunds take 7-10 business days to go back onto patient's accounts.

- 1.) Once you are in the pt profile go to payments and make sure you select the right transaction you are wanting to create a refund on

**Payments** + Add payment

<input type="checkbox"/>	AMOUNT			DESCRIPTION	CUSTOMER	DATE	
<input type="checkbox"/>	\$58.28	USD	Succeeded ✓	Invoice A49890F-0009	[redacted]@gmail.com	Aug 27, 11:37 AM	...
<input type="checkbox"/>	\$50.00	USD	Succeeded ✓	Invoice A49890F-0008	[redacted]@gmail.com	Aug 12, 1:00 PM	...
<input type="checkbox"/>	\$50.00	USD	Succeeded ✓	Invoice A49890F-0007	[redacted]@gmail.com	Aug 12, 1:00 PM	...
<input type="checkbox"/>	\$10.00	USD	Succeeded ✓	Invoice A49890F-0004	[redacted]@gmail.com	Jul 20, 10:58 AM	...
<input type="checkbox"/>	\$50.00	USD	Succeeded ✓	Invoice A49890F-0006	[redacted]@gmail.com	Jul 12, 1:00 PM	...

[View all payments →](#)

- 2.) You will then click on “refund” on the top right corner.

**PAYMENT** pi\_1HKo603d6pk3h7ZM48gFg7wV

**\$58.28 USD** Succeeded ✓ ↩ Refund... ...

Date	Customer	Payment method	Risk evaluation
Aug 27, 11:37 AM	[redacted]@gmail.com	visa **** 7923	Normal



3.) You will put how much you are refunding beside “refund” and add your reason for the refund. Then click REFUND

**Refund payment**

**i** Refunds take 5-10 days to appear on a customer's statement.

Refund  USD

Reason

A note is required when a provided reason isn't selected.

4.) It should say “Partial refund” beside the total amount you can just click where it says partial refund and it will tell you how much was refunded just make sure it is right and you are done.

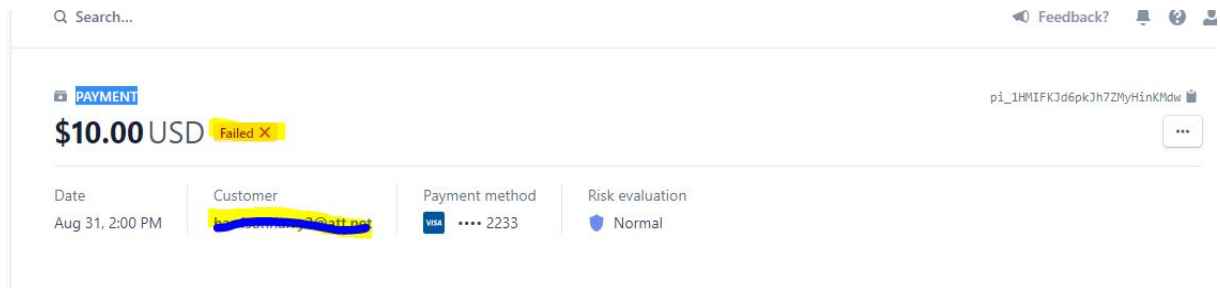
**PAYMENT**

**\$58.28 USD**

pi\_1HKo603d6pk3h7ZH48gFg7wV

# CARD DECLINE

1. If a pt card decline it will look like this ..it will say failed and the total beside it



2. You will have to let the pt know that his/her card declined..you will text the pt on “Zipwhip” if the pt doesn’t text you will have to call and leave a voicemail if they do not answer.
3. After letting the pt know you will make a (gold) task on glip..put pt name and due date under comments just out that the ot card declined and that you whether texted/called pt and put the total the pt calls back and someone else answers.calls back and someone else answers.

A screenshot of the 'Edit Task' form in a task management system. The form includes a title field with 'Harrison Harry', an 'Assignee(s)' field, and date/time fields for 'Start Date' (Sep 4, 2020) and 'Due Time' (Days). There are options for 'Repeat' (set to none) and 'Complete when' (radio buttons for 'Checked', 'Checked by all assignees', and '100% done'). A 'Color' field shows a row of colored squares. A 'Section' field is empty. A large text area contains the text 'card declined \$10 texted pt'. At the bottom, there is an 'Attach File' button and a 'less ↑' link. A prominent green 'SAVE TASK' button is at the very bottom.

- 4.


# VOID A PAYMENT

Example: Patient has a past due payment of invoice and decides they no longer want the transaction and you want to void it so it will won't keep trying to auto collect charge.

Click Invoice you want to void:

Invoices					
AMOUNT				INVOICE NUMBER	CUSTOMER
\$50.00	USD	🔄	Failed	26372C91-0004	lsyunker@yahoo.com
\$50.00	USD	👌	Paid	26372C91-0003	lsyunker@yahoo.com

Select the ...


 INVOICE

**26372C91-0004** for \$50.00 Failed

Last attempt yesterday

[+ Add note](#) [Retry charge](#) [...](#)





Select change invoice status


 INVOICE

**26372C91-0004** for \$50.00 Failed

Last attempt yesterday

[+ Add note](#) [Retry charge](#) [...](#)

-  Duplicate invoice
-  **Change invoice status**
-  Issue a credit note
-  Turn off automatic collection

 Payment failed  
Aug 22, 2020, 1:00 PM

Select Void and add a note why  
Then select update status

0.00 Failed

Change invoice status

Mark invoice as...

Paid  
Payment was collected outside of Stripe.

**Void**  
This invoice was accidentally finalized or contains a mistake.

Uncollectible  
Payment of this invoice is not expected. It is still possible to collect payment should your customer attempt to pay.

Add internal note

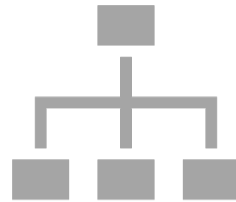
Add a note..

**!** You cannot undo this action.

Cancel Update status

When you go back to main profile screen it should now be marked and void and no longer trying to payment

AMOUNT	INVOICE NUMBER
\$10.00 USD	<b>Void</b> 88293F5-0010



**Technology:** Customer  
Relationship Management  
(CRM) and Team Management  
Software

# Customer Relationship Management (CRM) Software

Maintaining communication with member patients before, during, and after the sync process keeps syncs on schedule and patients satisfied

A Customer Relationship Management (CRM) software provides a means to organize and track patient communication

CRM also may be leveraged to shift telephone communication to text message communication, improving clarity and efficiency

- **Case Example:** Good Shepherd Pharmacy uses Zipwhip

# Zipwhip

What is zipwhip?

Zipwhip is a software program that allows us to send and receive text messages from our patients.

We use Zipwhip daily to keep in contact with our patients and to help us meet their needs faster.

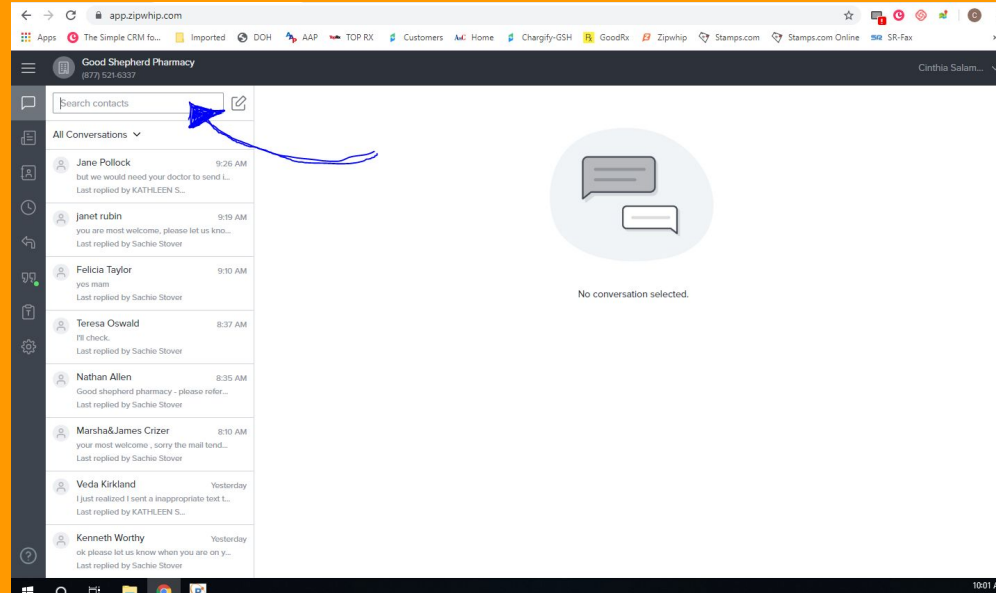
Most of our patients communicate with us through Zipwhip, however not all of our patients have the capability to text, so we do receive some phone calls from patients as well.

You will learn how to use Zipwhip in the following slides.

# Sending a message

Sending a text message in zipwhip is very simple.

1. Go to [zipwhip.com](https://zipwhip.com) and log in using your user name and password.
2. Click on the search icon in the top left corner.
3. Search for the patient's name and click on their contact information.





3. Once you have clicked on the correct contact your screen should look like this.

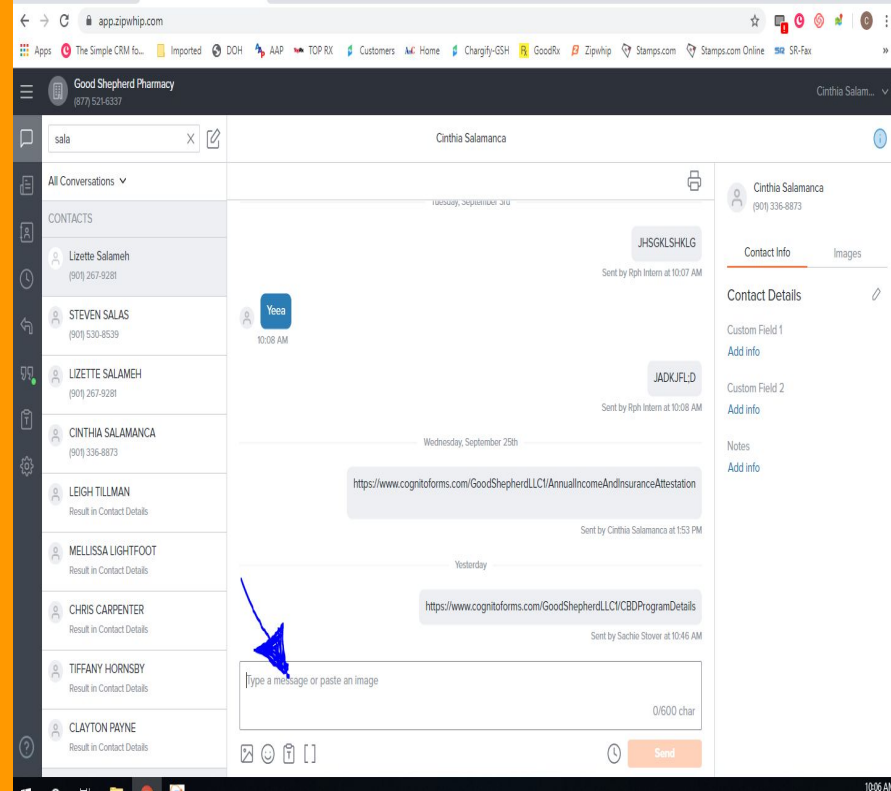
4. Type in the message you want to send to the patient.

5. Click the orange “send” button to send the message.

6. Refresh the web page after sending the message.

You will be taken back to the home screen.

If you don't refresh the web page, when the patient texts back, the message will be automatically read by the software program and it might be missed by gsh staff.



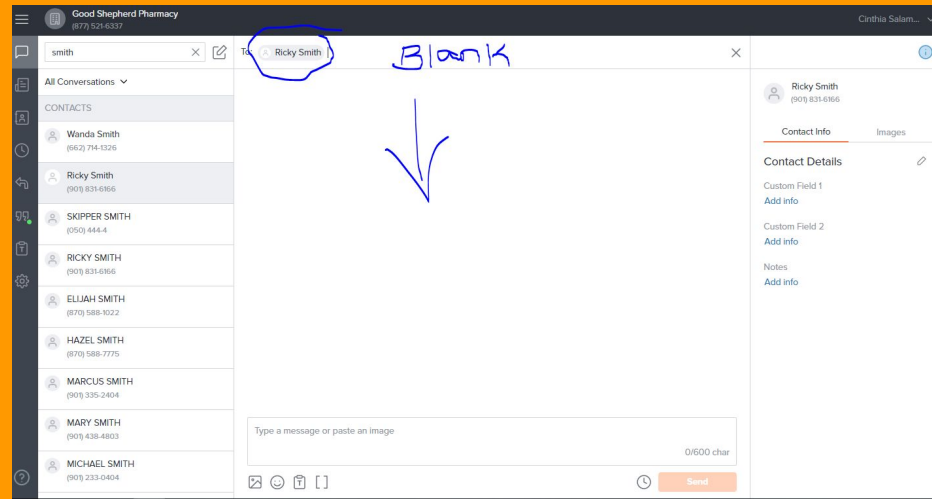
# What to do if the message won't send?

If you get an error message saying, “message won't send,” then it is likely that the patient did not receive the text message.

If there are no previous text conversations in the Zip Whip program, then the patient probably does not have a texting service set up. You will need to call the patient instead of using Zip Whip.

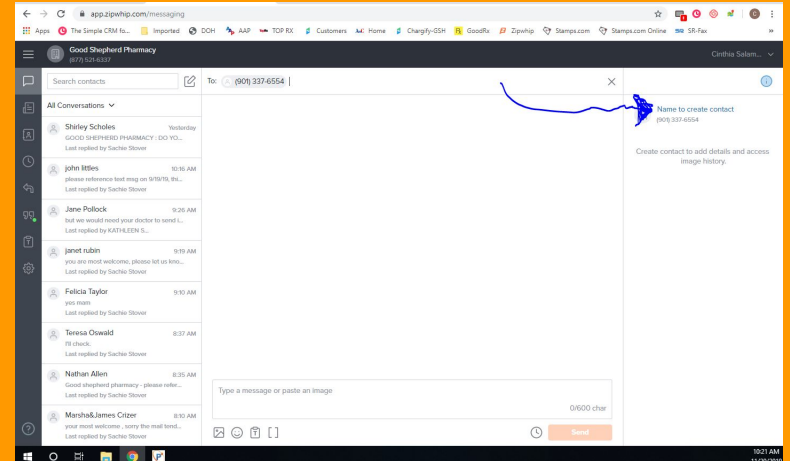
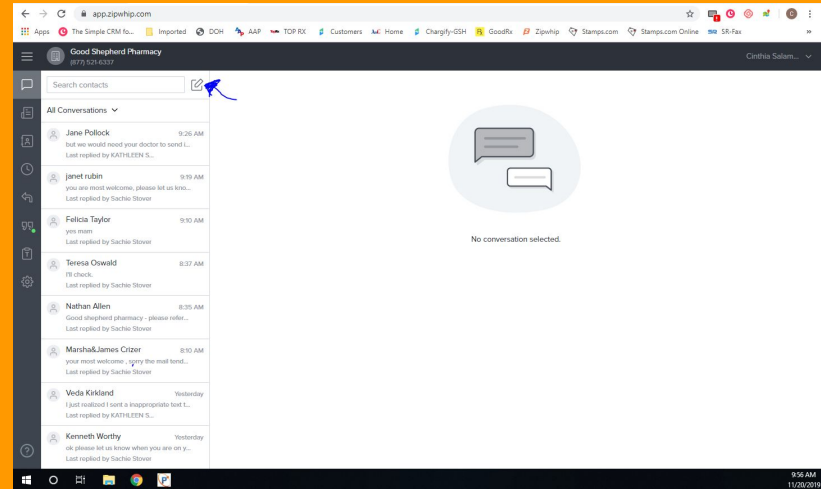
In the example to the right, there are no text messages listed for the patient Ricky Smith. He doesn't text!

Sometimes you will get a different message saying “sending error.” This means the patient blocked us or no longer receives text messages.



# Entering a Contact

1. Once logged in you should be able to see the pencil and paper icon in the top left corner.
2. Type in the patient's number on the right side bar.
3. In the right top corner you should see that it says "add to contact"
4. Please add the patient's first and last name.
5. Then send your message and you are done!

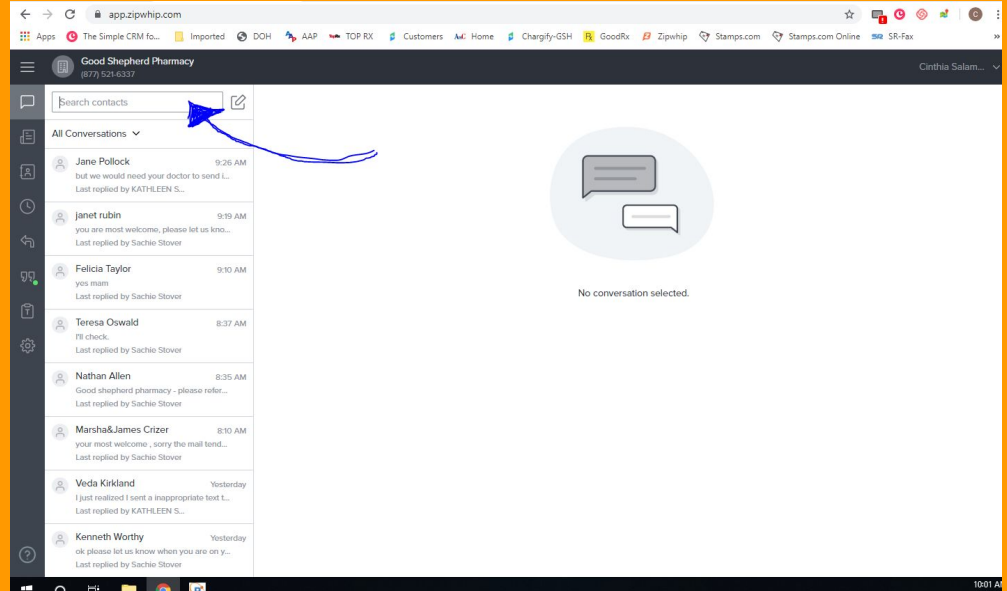


# Contact Look-Up

The process for looking up a contact is similar to sending a message.

Click the top left corner bar where it says “Search contacts.”

You can search by the patient’s first or last name.



# Autoresponders

What are autoresponders? Autoresponders are messages that we created from zipwhip to automatically respond to people who need our help.

Ex: If a patient texts the word “INSULIN” the autoresponder will reply with a link to a form for the patient to see if they qualify for insulin.

Ex: If they text the word “ SIGNUP” the autoresponder will send another link to fill out. Someone will contact that person to help them sign up over the phone.

Ex: If they text before or after work hours, during holidays, or because of bad weather, our patients will get an auto response that we are closed and will get back with them the next business day.

# Helpful Hints

Make sure that you always remember to refresh the webpage in Zipwhip after sending a text message.

Make sure you do not read a text message from a patient and leave it marked “read” without responding to the patient. (If you accidentally read the message and you don’t know how to respond make a red task in Glip (our internal communication software program).



# Pharmacy Team Communication Management

- The Membership Pharmacy Model can layer on top of a traditional pharmacy dispensing model
- However, running both pharmacy models simultaneously will add additional complexity to workflow
- A well-defined team communication strategy, including task-tracking is critical
  - **Case Example:** Good Shepherd Pharmacy uses Glip

# GLIP TUTORIAL

1. What is Glip?
2. Task Colors
3. Task Creation
4. Task Editing and Completing
5. How to add a comment
6. How to search for a previous task



# What is Glip?

- Glip is Good Shepherd Pharmacy's primary method of communication. Through glip we track a wide variety of patient care related topics including communication with doctors, reminders regarding patient care, new sign-ups, phone calls/text messages, shipping and payment related tasks. We may also occasionally use it for problems that arise in the pharmacy that need attention.
- We call each of these categories listed above "tasks" and they are color coordinated.
- Now we will go through and get acquainted with each color and their appropriate protocols.

# Blue task: Communicating with Doctors' Offices

These tasks are for communications with doctors offices. There are a wide variety of reasons we may need to contact a doctors office but we will list the most common reasons below.

- 1) We have received a prescription that was wrong, not clear or needs clarification. Ex: Doctor sends over a prescription that says Atorvastatin 40mg, take 2 tablets by mouth at bedtime, writes it for a qt of 90 and a day supply of 90. In this example, the qt on the prescription and directions and day supply do not match. We will make a task at this point and contact the doctor for clarification.
- 2) Drug interactions- One of the jobs within the pharmacy is catching drug interactions. This is the pharmacists job so they will occasionally make tasks to discuss these things with the prescribing doctor.
- 3) We no longer carry a particular medication but have a substitute medication that would work in its place. These tasks are typically done in bulk. Ex: we no longer get Symbicort that 25 of our patients are currently taking, therefore we make tasks for each of those patients individually, to request a switch to Spiriva. The doctor must approve and provide a new prescription for new medication.

## -Protocols

- 1) In the examples above, we will make 3 attempts to call the doctor's office. After that, we will contact the patient and let them know that we were unsuccessful in our attempt to talk with their doctor and t they should contact their doctor at this point.
- 2) If we do get a response, instead of completing the task, we will change it to red for the next step.

# Green Tasks: Waiting

-These tasks are typically waiting on something that is a good bit off in the future. Normally the patient has requested we wait until a certain day to get in touch with them again or a day we should start looking out for something.

Example: A patient states that they will not be going to the doctor until a certain day, but when they do they will be sending over a prescription that we do need to fill.

-Protocol

- Always assign a due date.
- Complete when resolved.

## Yellow Task:(greenish gold color)

These task are for when patients membership, medication or ship cost past due.

Example: Stripe shows past due amount

We call and email patient to make arrangements

If patient calls or text back with arrangements make glip task or make note on existing task.

- Assign due date

- Complete when resolved

# Purple tasks: New Sign Ups

**\*These tasks are for new sign ups\***



-NOTE: You may make a task here but please notify Sachie our customer service rep before completing it.

# Orange task: On Hold

-These tasks are things that are on hold. Unresolved issues that are not ready to be completed. You could think of these as reminders, holds or incompletes.

-A few examples

- 1) A patient has called to let us know that the doctor is sending over a prescription today or tomorrow and they want us to contact them back to let them know we did receive it.
- 2) We are waiting on a patient to mail us their prescriptions, so we know to look out for them and to notify patient when we have received it.

-Protocols

- 1) Complete when resolved.

# Red Tasks: Urgent

-These tasks are the most important on Glip and should be looked at and treated as URGENT.

-These mainly consist of patients who have left voicemails or sent text messages that need to be responded to quickly.

-These also may consist of blue tasks that have now been switched to red. The protocol to switch blue tasks to red is because typically are pharmacists complete those tasks. A pharmacy technician needs to look over the resolution that was made to see if the patient's profile needs to be updated in any way or if the patient needs to be contacted.

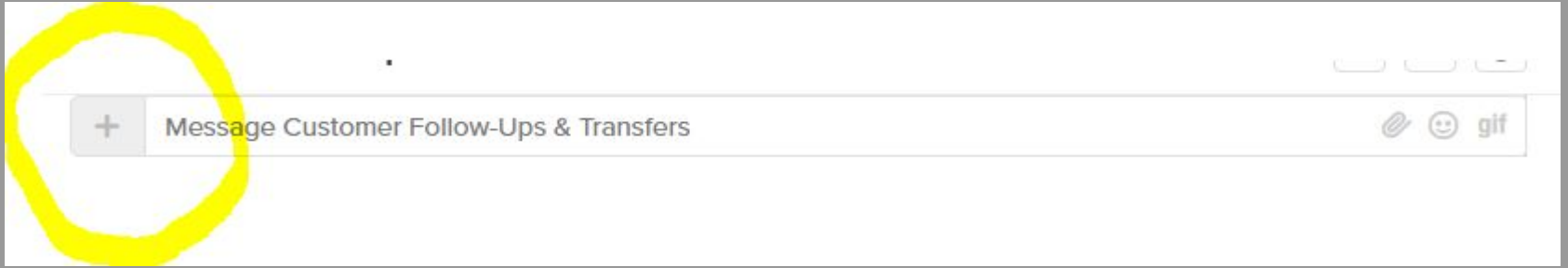
-Protocols

- 1) These tasks must be dealt with promptly.
- 2) No red task should remain when leaving for the day.
- 3) These tasks either need to be completed or assigned to another color as needed.

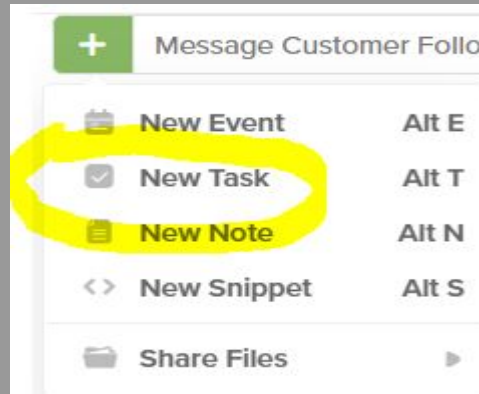
# Creating a Task

-How to make a task

- 1) On the top of your screen you will see this. Click the “+” symbol.



- 2) Click “New Task”





# Creating a task-continue

- The highlighted items seen to the side are areas you MUST fill in.
- Task title is almost always the name of the patient.
- Pick the appropriate color
- Then add your detail..Think “why am I making this a task”

**NOTE: if you are making a blue task, PLEASE include the patient's Date of Birth in parenthesis next to their name. Also put the doctors name and phone number in the description area.**

- You may also add an assignee (a specific employee that needs to tend to this task) or a due date as appropriate.

## New Task

Complete when:

■ ■ ■ ■ ■ ■ ■ ■

Attach File  After saving, create another task less ↑

## Completing a task

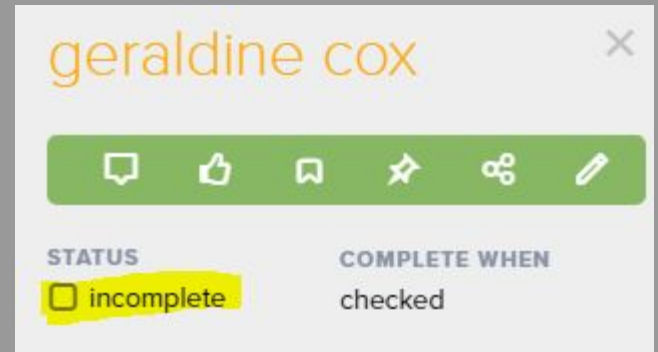
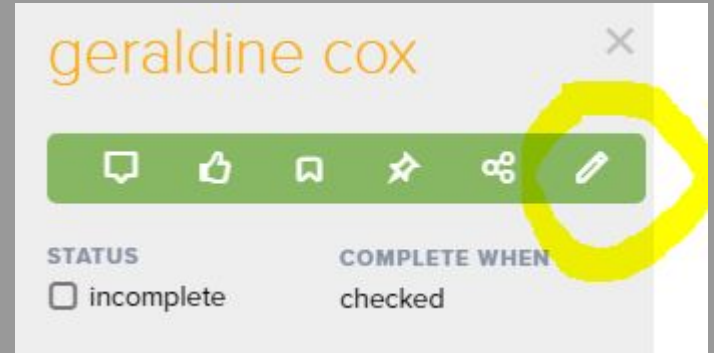
A task may be completed when ALL issues have been resolved. It is not out of the ordinary for a task to be created for one reason and then other issues arise later. It is also not uncommon for tasks to switch colors multiple times. Below you will see A) how to change a task's color and B) how to complete a task.

A) Changing task Color----->

-Select the pencil looking icon and it will take you back to original "creating a task" screen.  
- Then you can select the color you wish to change it too

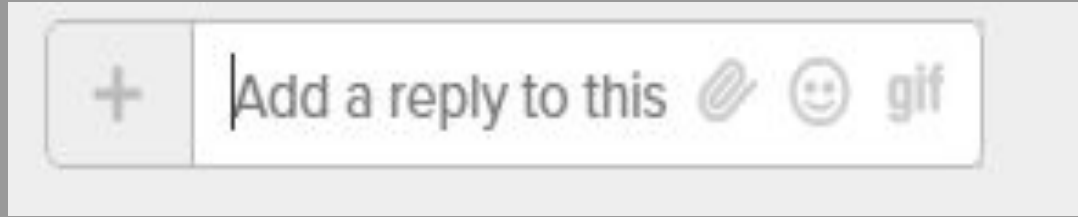
B) Completing a task----->

-To complete a task you will just check the box next to "incomplete" and it will change the task to complete.



## How to add a comment

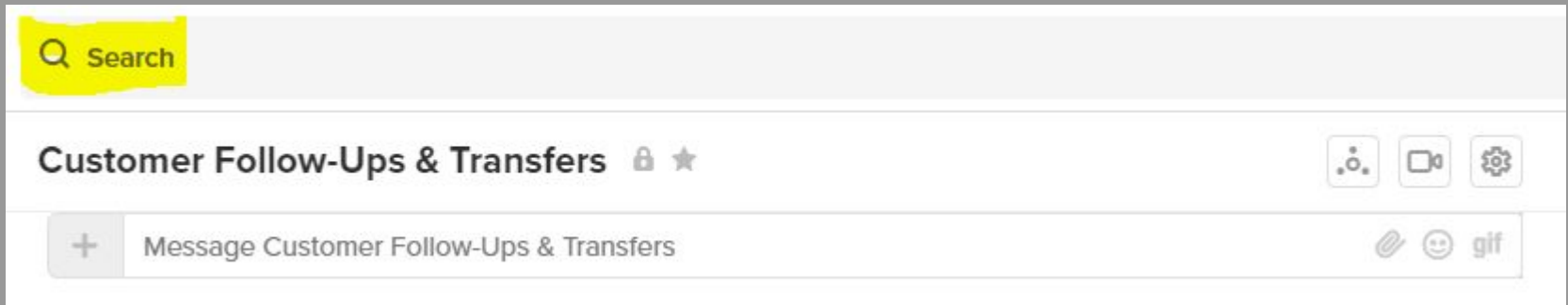
-When you click on a task, this box will appear at the bottom of it. You will type your comment and then hit “enter.”



# How to search for a previous task

-One of the reasons Glip is SO important, is because its our tacker and back-up for almost everything. Because we can search Glip, we have a database that helps us see who called, what was done and resolutions from years past. This comes in hand DAILY. Lets go over a few examples that show off Glips usefulness.

- 1) A patient calls and says they requested their medications to be sent on April 14th. My first step would be to type the persons name (see below the search key found at the top of Glip). Hopefully I will see the patient's name show up and a task that has been completed in the pink section (shipping) on April 14th.
- 2) A patient calls wondering why they haven't received a certain medication. You may search glip and see that it was a medication that we no longer carry, that we contacted the doctor 3 times with no response and then left a voicemail on the patients phone (or sent them a text) to let them know.



# How to search for a previous task- continued

- In some cases we may want to reopen a previous a task. Again think of tasks as a database or text messages you have on your phone. We will sometimes scroll up through a text thread with someone on our phones to see what we were previously talking about to jog our memories. We do the same thing on Glip. And for this reason we want EVERYTHING documented. In the event a task was completed, but another problem arises that seems like the information in the “completed” task would be helpful to “jog our memory”, we will re-open the task and assign it to the person who completed it. See below.

First you will uncheck the box that says “complete”



Elizabeth Raiteri ✕  
5/19/56

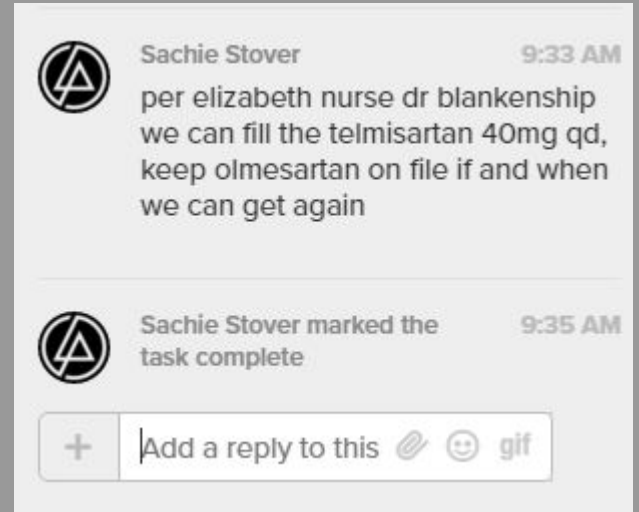
**STATUS**  
 complete


**COMPLETE WHEN**  
checked

**DUE**


Then you will assign the task in this scenario to Sachie.



REMEMBER: you will do that by editing the task (as if you were changing its color) and then typing Sachie's name in the “assign” part.



 **Sachie Stover** 9:33 AM  
per elizabeth nurse dr blankenship we can fill the telmisartan 40mg qd, keep olmesartan on file if and when we can get again

---

 **Sachie Stover marked the task complete** 9:35 AM

+ | Add a reply to this   gif



**Shipping:** Technology and  
Workflow

# Selection of a Shipping Software

- Shipping synced medications can be a labor-intensive process
- A well-defined workflow and use of shipping technology can streamline shipping
- A variety of online shipping software options are available
  - **Case Example:** Good Shepherd Pharmacy uses Endicia®



endicia®

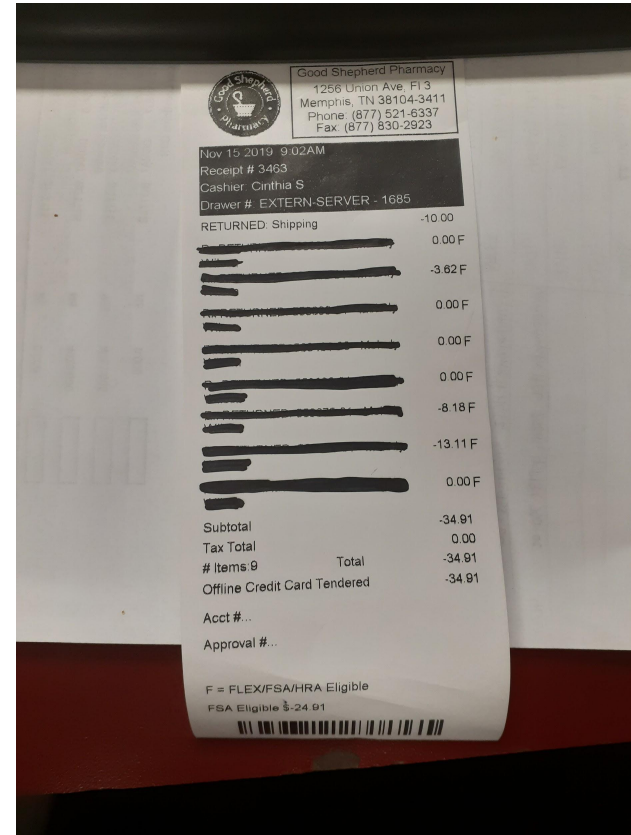
## ENDICIA (Shipping) WORKFLOW

1. Scan the receipt you received from completing a point of sale
2. Match the customer's address with the label
3. Weigh it: Boxes vs. Bag
4. >1 pound = priority <1 pound
5. Enter weight and round up
6. Click Print Label
7. Refunding a label
8. Reprinting a label
9. Apply Label
10. Checking Delivery status
11. Package lookup



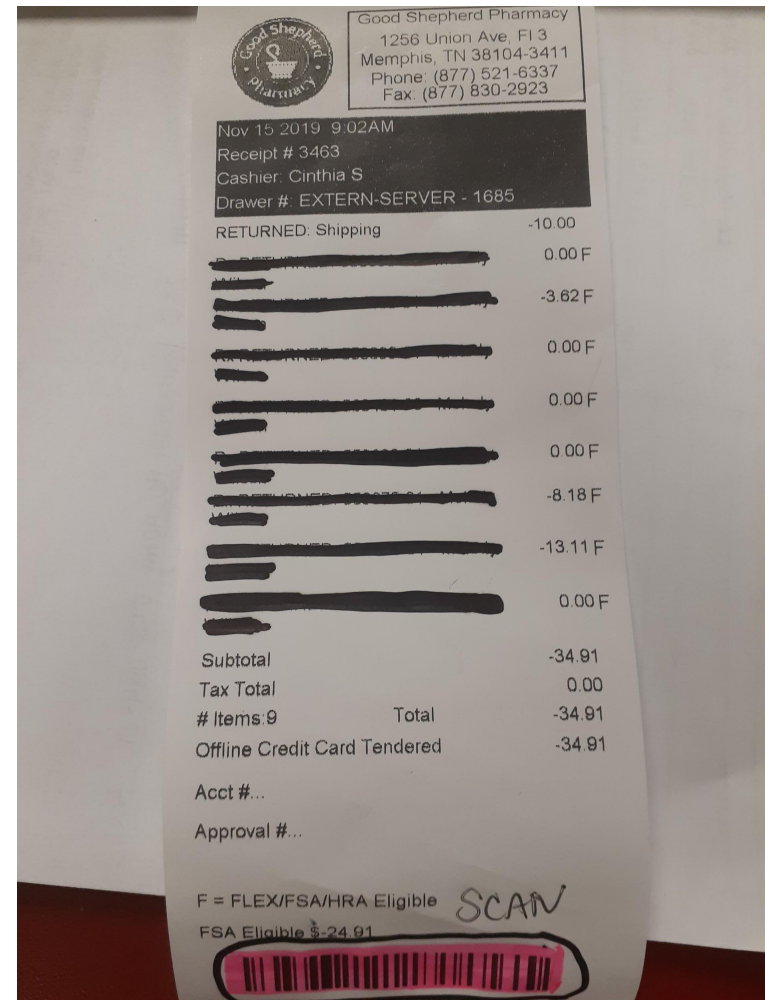
# What is a Receipt?

- A receipt is a piece of paper that prints automatically once a sale is completed through point of sale in the Pioneer Software. It will print from the printer shown below.
- You must complete point of sale in Pioneer before moving on to Endicia for shipping.
- To the right you will see what the receipt looks like.
- You will use this receipt to complete shipping through Endicia.



# Locate the Bar Code

- The picture to the right shows the barcode highlighted in pink at the bottom of the receipt.
- You will need to scan the barcode into the search bar in endicia in the next slide/step.



# Scan the receipt

1. Log in to endicia.
2. Scan your receipt (the paper that prints when the point of sale is completed).
3. Once receipt is scanned the patients' information should automatically pop up in Endicia.
4. Make sure the address in Endicia matches the address on the receipt.

The screenshot shows the Endicia Professional software interface for creating a shipping label. The window title is "Endicia Professional (Account 1348758)". The menu bar includes "File", "Edit", "Tools", and "Help". Below the menu bar are buttons for "Order Lookup", "Batch Print", "Postage Log", and "Address Book".

A handwritten word "Scan" is written in the top left corner of the interface, with an arrow pointing to the "Shipping Address" section.

The "Shipping Address" section includes a "Retrieve Order" button, a text input field for the address, and a "Name" field with sub-fields for "Company" and "Street Address". There are also fields for "City", "State", and "ZIP Code", and a dropdown menu for "UNITED STATES". A red warning message "Unverified address" is displayed, with "Verify Address" and "Show Map" buttons below it.

The "Postage and Additional Fees" section shows a price of "\$0.00" and a "Print Label" button.

The "Package Weight and Size" section includes a "Scale" dropdown menu set to "8 oz", and fields for "L", "W", and "H" dimensions. There are "Edit" and "New" buttons, and checkboxes for "Large Package" and "Irregular Parcel".

The "Services" section includes a "Mail Class" dropdown menu set to "First-Class Package Service", a "Tracking" dropdown menu set to "USPS Tracking", a "Package Value" input field, and a checkbox for "Use USPS Insurance".

The "Additional Details" section includes a "Postmark Date" dropdown menu set to "11/21/2019", and input fields for "Recipient Email" and "Recipient Phone".

The "Service Options" section includes checkboxes for "Stealth Postage", "COD", "Hold For Pickup", "Special Handling", "Certified Mail", "Adult Sig. Required", and "Adult Sig. Restricted". There are "Edit Options" links for "COD" and "Special Handling".

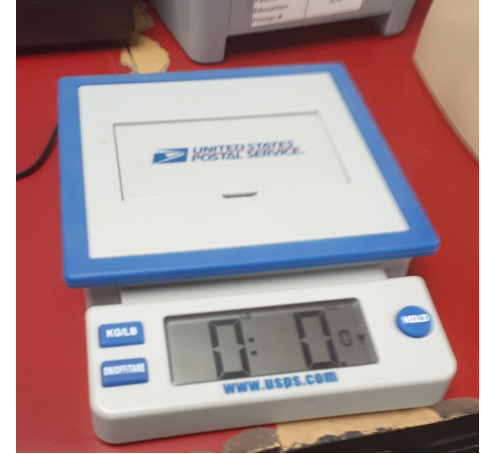
The "Additional Reference Fields" section includes a "Description" field and a "Group Code" dropdown menu set to "Pro Plan 316". Below this are ten "Rubber Stamp" fields.

At the bottom, there is an "Active Profile" dropdown menu set to "Profile 1", and "Edit Profile" and "New Profile" buttons.

# Weigh your package

Place your package on the scale and type the weight amount into Endicia. Always round up. For example: If the package weighed 6.4oz you will enter 7oz in Endicia).

If the package is more than 1lb (pound) you will need to change the mail class to priority.



**\*HINT: Anything that weighs more than 1LB should be shipped as priority mail. If it's under 1lb it should be shipped under first-class package service.**

Endicia Professional (Account 1348758)  
File Edit Tools Help

Order Lookup Batch Print Postage Log Address Book

Shipping Address  
Retrieve Order

Name  
Company  
Street Address

City State ZIP Code

UNITED STATES

Unverified address  
Verify Address Show Map

Services  
Mail Class  
First-Class Package Service

Tracking  
USPS Tracking

Package Value

Use USPS Insurance

Postage and Additional Fees  
\$0.00  
Print Label

Package Weight and Size  
Scale Weight  
8 oz

L W H

Edit New

Large Package  
 Irregular Parcel

Additional Details  
Postmark Date 11/21/2019  
Recipient Email  
Recipient Phone

Service Options  
 Stealth Postage  
 COO  
 Hold For Pickup  
 Special Handling

Certified Mail  
 Adult Sig. Required  
 Adult Sig. Restricted

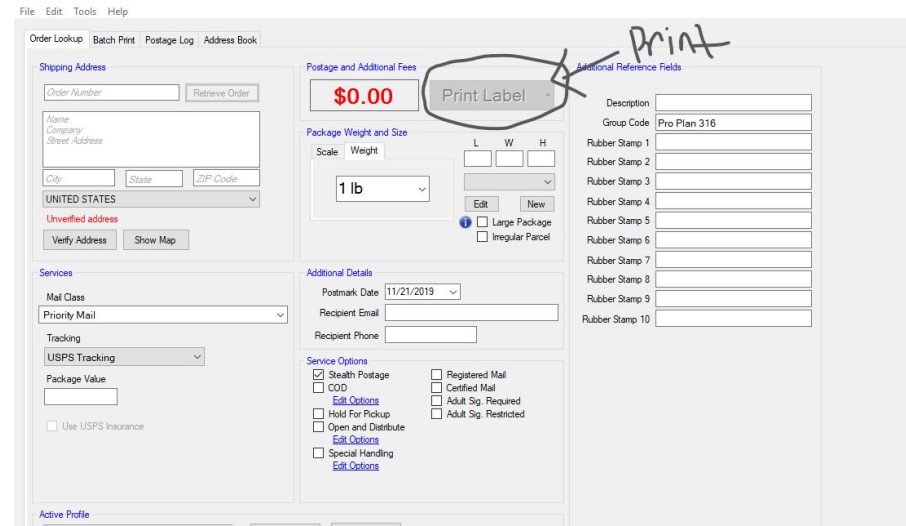
Additional Reference Fields  
Description  
Group Code Pro Plan 316  
Rubber Stamp 1  
Rubber Stamp 2  
Rubber Stamp 3  
Rubber Stamp 4  
Rubber Stamp 5  
Rubber Stamp 6  
Rubber Stamp 7  
Rubber Stamp 8  
Rubber Stamp 9  
Rubber Stamp 10

Active Profile

# Click print label

Once all previous steps are completed you may now click the “print label” button.

Your shipping label should of print in the shipping printer.



The screenshot shows a shipping software interface with several sections:

- Shipping Address:** Includes fields for Order Number, Name, Company, Street Address, City, State, and ZIP Code. A dropdown menu is set to "UNITED STATES". There are "Verify Address" and "Show Map" buttons.
- Postage and Additional Fees:** Shows a total of "\$0.00" and a "Print Label" button circled in black with a handwritten arrow and the word "Print" above it.
- Package Weight and Size:** Includes fields for Scale, Weight (set to "1 lb"), L, W, H, and a dropdown menu.
- Services:** Includes a "Mail Class" dropdown set to "Priority Mail", "Tracking" set to "USPS Tracking", and a "Package Value" field.
- Additional Details:** Includes "Postmark Date" (11/21/2019), "Recipient Email", and "Recipient Phone" fields.
- Service Options:** Includes checkboxes for "Stealth Postage", "COD", "Hold For Pickup", "Open and Distribute", "Special Handling", "Registered Mail", "Certified Mail", "Adult Sig. Required", and "Adult Sig. Restricted".
- Additional Reference Fields:** Includes a "Description" field and a "Rubber Stamp" section with 10 rows.



# Place the label on the box

Place the shipping label on to the package. To the right you will see an example of what the shipping label looks like.

Make sure you put the label on the box/bag as straight as possible to prevent issues with the post office when they scan the label.



When you are done place package into the postal bin!



# Refunding and Reprinting a label



1. You will click on the endicia icon ----->
2. Once you are on the app on the top left corner you will click on “postage log”
3. Then, you will click on whatever patient you want to return/reprint
4. After clicking on the patient on the top left corner you will see the options refund/reprint and you click on whatever you want to do and just press “OK”

The screenshot shows the Endicia Professional interface. At the top, there are navigation tabs: "Order Lookup", "Batch Print", "Postage Log", and "Address Book". Below these is a toolbar with icons for "Check Status", "Refund", "Reprint", "SCAN Form", "Mark as Unshipped", "Returns", and "Export". The main area displays a table of postage log entries. The table has columns for "Web Store", "Type", "Postage", "Recipient", "Optional Services", "Tracking ID", and "Weight". The "Recipient" column contains redacted names. To the right of the table is a summary section with the following information:

Web Store	Type	Postage	Recipient	Optional Services	Tracking ID	Weight
	First-Class Packa...	\$2.66	[REDACTED]		9400110200830...	2 oz
	First-Class Packa...	\$3.82	[REDACTED]		9400110200882...	10 oz
	First-Class Packa...	\$3.18	[REDACTED]		9400110200793...	8 oz
	First-Class Packa...	\$2.66	[REDACTED]		9400110200883...	2 oz
	First-Class Packa...	\$2.66	[REDACTED]		9400110200883...	4 oz
	First-Class Packa...	\$3.82	[REDACTED]		9400110200881...	10 oz
	First-Class Packa...	\$2.66	[REDACTED]		9400110200793...	3 oz
	First-Class Packa...	\$2.66	[REDACTED]		9400110200882...	2 oz
	First-Class Packa...	\$3.20	[REDACTED]		9400110200830...	8 oz
	First-Class Packa...	\$4.94	[REDACTED]		9400110200882...	13 oz
	First-Class Packa...	\$2.66	[REDACTED]		9400110200829...	3 oz
	First-Class Packa...	\$2.66	[REDACTED]		9400110200829...	4 oz

Print Date & Time: 11/19/2019 9:20 AM  
Ship Date: 11/19/2019  
Account: 1348758  
Balance: \$240.99  
Postage Amount: \$3.18  
Address: Amer A Alkurdi  
10088 Woodlee Cv  
Cordova TN 38016-0367  
Email: AMER0317@GMAIL.COM  
Phone: 9012833613  
Piece Count: 2788  
Postage Class: First-Class Package Service  
Optional Services:  
Tracking ID: 9400110200793211562254  
Weight: 6 oz  
Value: \$0.00



# PACKAGE LOOKUP/STATUS

1. Go to [print.endicia.com](http://print.endicia.com) and log in.
2. Once you are logged in, on the top in the middle click “history” then “search print history”
3. Once you are on the print history on the left side you will see date printed options...Example “past 7 days, “past 3 months” etc.you click whatever option you need .

The screenshot shows the Endicia web interface. The top navigation bar is orange with the Endicia logo and menu items: MAIL, ORDERS, PRODUCTS, CONTACTS, HISTORY (circled in blue), REPORTS, SUPPLIES, HELP. Below the navigation bar, there are links for 'Print |' and 'Favorites'. The main content area is a form for printing labels. It includes the following fields and options:

- Print On: Stamps (dropdown menu)
- Serial #: (input field) (Found on NetStamps® label sheet or roll)
- Mail From: Good Shepherd Pharmacy - MEMPHIS, (dropdown menu)
- Mail To: United States (dropdown menu)
- Weight: 0 lbs. 8 oz. (input fields) Weigh  Auto
- Service: MM Package/Flat/Thick Envelope (2-9 (dropdown menu) \$2.80

Below the service field is a link: [Show Advanced Options](#) (dropdown arrow). To the right of the form is a 'Starting Label:' section with a grid of 12 label slots. On the far right, there is a partial view of a label with the text 'Serial Ni' and 'ENTER SE Find the si the com'.

# Package lookup/ status

1. After you click on whatever option you needed you will see these options. It has the date, shipment status, tracking # etc
2. You can see all the information that you will need.. You could also just copy tracking # and look up on google too

<input type="checkbox"/>	✓ Date Printe...	Amount P...	Adj. Amount	Quoted A...	Payment ...	Shipment Status	Tracking #	Date Delive
<input type="checkbox"/>	08/18/2020	\$3.45		\$3.45	Prepaid	Printed	9400111899563696311990	
<input type="checkbox"/>	08/18/2020	\$3.41		\$3.41	Prepaid	Printed	9400111899563696064230	
<input type="checkbox"/>	08/18/2020	\$3.41		\$3.41	Prepaid	Printed	9400111899563696029222	
<input type="checkbox"/>	08/18/2020	\$7.64		\$7.64	Prepaid	Printed	9405511899563696045331	
<input type="checkbox"/>	08/17/2020	\$7.84		\$7.84	Prepaid	Printed	9405511899563699363845	
<input type="checkbox"/>	08/17/2020	\$2.94		\$2.94	Prepaid	Printed	9400111899563695929806	
<input type="checkbox"/>	08/17/2020	\$3.41		\$3.41	Prepaid	Printed	9400111899563623824388	
<input type="checkbox"/>	08/17/2020	\$2.94		\$2.94	Prepaid	Printed	9400111899563623890390	
<input type="checkbox"/>	08/17/2020	\$2.94		\$2.94	Prepaid	Printed	9400111899563623876608	
<input type="checkbox"/>	08/17/2020	\$2.94		\$2.94	Prepaid	Printed	9400111899563623841071	
<input type="checkbox"/>	08/17/2020	\$5.24		\$5.24	Prepaid	Printed	9400111899563623816390	
<input type="checkbox"/>	08/14/2020	\$2.94		\$2.94	Prepaid	Delivered	9400111899563031271118	08/15/2020