staycloseonline.com

How to use the website

Logging In

- User Name is your email that you provided to us.
- Password is case sensitive, so be aware.
- Contact Wei Laboratories, if you have problems signing in.

My Account

- Home: this is where you change your password or update your profile information.

- My Profile Picture: this is where you can upload a photograph of yourself or office.

- Update Profile: this is another way to update your profile information.

- Change password: this is another way to change your password.

Patient

- Add Patient: this is where you add one patient at a time
  - information for each patient is:
    - First Name
    - Last Name
    - Email

Patient, continued

- Address: this is the Patient's address
- City, State, Zip: these are also the Patient's
- Phone: this is the Patient's contact phone (i.e. home, cell, work phone number)

Enter the rest of the Patient's information, including primary Physician information, as you get it from the Patient.

Remember to click on save when finished.

Patient, continued

- Import Patient from Excel
  - Here is where you can import all of your patients at one time.
  - There is a link to an Excel spreadsheet/template that you can save on your computer to use at any time. You can also use it over and over again by saving it on your computer under different names. Wei Laboratories uses this once a month to add more Doctors.

Patient, continued

- My Patient – this is where you will see a list of everyone you have added in the past. Here you are able to edit, delete, send the Patient's their password by email or just send a quick email by clicking on their email address.

- My Patient (inactive) – this is a list of patients you have marked as inactive. (This is done in the edit portion of My Patient list.

Rewards

- This is the section where you record the rewards that you pay out to the Patients that have referred someone to you.

Set up Reward Points

- Here you will decide the point value of the reward system. (Most will leave this alone. Wei Laboratories uses it as a reminder to send rewards out.)
  - The reward can be anything you want to use, i.e. gift certificates for free or reduced cost of service at your office, dinner at a restaurant, shopping at a local store. (Wei Laboratories sends out gift certificates for free merchandise being ordered.)

Rewards, continued

- Redeem
  - When you click on this link, you are taken to an email template to send information to the people you are rewarding for referring you to others
    - Wei Laboratories uses this to let people know to watch their mail for a gift certificate.

Rewards, continued

- Level I
  - This is where you will find a list of people that have referred you to others only one level deep.

Rewards, continued

- Level II
  - This is where you will find a list of people who have referred people to you two or more levels deep.

Rewards, continued

- Redeem History
  - This is where you will find a list of everyone you have rewarded in the past.
    - You can un-redeem their points, if you wish, but Wei Laboratories does not do this as once someone gets a gift certificate, it's very hard to get it back from them unused.

Email

- Create Newsletter Email
  - This is where you will created your newsletters.
    - If you choose a template, remember you cannot preview it until it has been saved after being created or edited.
    - Click on the "Add" button to create a new newsletter. Remember to give is a unique name when you save it to your computer.
    - There is also a list of pre-created newsletters by Wei Laboratories that you can choose to use.

Email, Continued

- Send Invitation
  - This is where you will send an email to an individual Patient inviting them to use this site to communicate with you.

Email, continued

- Send Newsletter
  - This is where you will send out the newsletters that you have created to everyone in your Patient list.
  - You can also delete the email addresses that are defaulted in the address box, and send to only one Patient if you choose to.

Email, continued

- Send Newsletter to Primary Care Physician
  - This is where you will send a newsletter you created for the Primary Care Physicians of your Patients, if you choose to. Or you can send a quick email to one or more Primary Care Physicians from here also.

Who referred whom?

- To note who has been referring others to your office:
  - Go to My Patient
  - Find the new Patient in the list
  - Click on the Edit button
  - The second line is "Referred By" – this is a drop-down list of everyone in your Patient list. Here you will find the person who referred this patient and click on their name to add them to this line.

Who referred who?, continued

○ Go back to your Patient list
  ● Click on the button that looks like this:

It will show you a graphic of who was referred by this person.