

SMART



hormoneassessment.com

User Manual

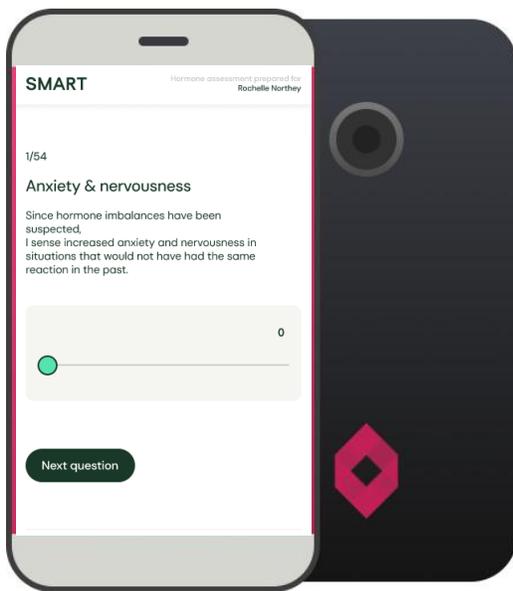
November 2023

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Introduction

The SMART Hormone Assessment is an online adaption of a questionnaire and algorithm by Dr. Ken Speidel to assist treating doctors in capturing patient symptomatology and predicting patient hormone imbalances.



The Assessment

Issued to the patient by email link, the Assessment typically requires 15 to 20 minutes to complete. There is a separate series of questions for males and females.

Patients provide a medical history, lifestyle insights, and family medical background before completing the questionnaire. The questionnaire for males comprises 43 questions and 54 for females.

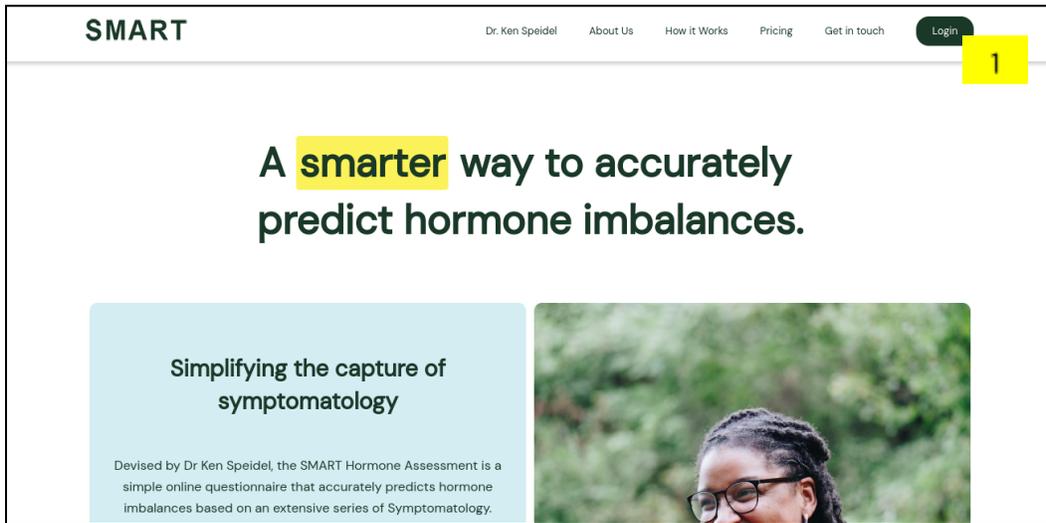
Dr. Ken Speidel

R.Ph., BS Pharm., PharmD. FIACP., FACA.

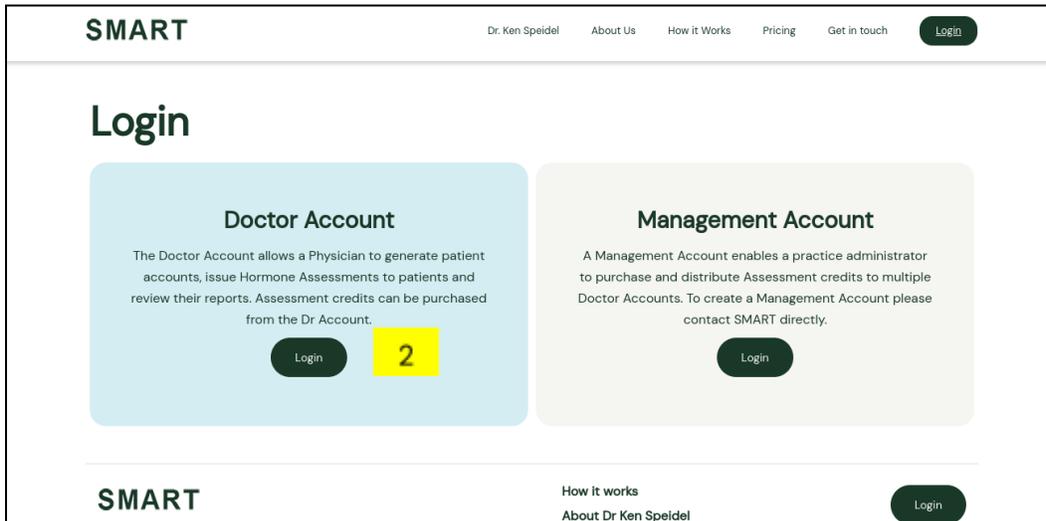
Dr. Speidel has been awarded Fellowship status with the International Academy of Compounding Pharmacists and the American College of Apothecaries. Ken received a Doctor of Pharmacy and a Bachelor of Science in Pharmacy from Ohio Northern University. He has additional postgraduate training in endocrinology, aseptic compounding, extemporaneous compounding, functional medicine, and pain management.

Accessing the Doctor Account

When registering for hormoneassessment.com, you have selected a username and password; you will need both to access your Doctor Account.



Select **LOGIN (1)**, and then **DOCTOR LOGIN (2)**, that will allow you to enter your username and password.



The screenshot shows the SMART Doctor Account interface. At the top, it says "SMART" and "Logged in as Dr David Gower" with a "Logout" button. Below this, it says "Welcome back Dr David Gower". There are three tabs: "Patient Accounts" (selected), "Edit My Details", and "Purchase Credits". To the right, it says "Credit Balance: 42". Below this is a search bar "Filter by Organisation or Name...". The main content area is titled "Active Client Accounts" and lists seven patients: Anna Briad, Becky james, Denise Lawrence, Donna Owens, Janine Walsh, and Julie Walsh. Each patient name has a yellow box with the number "1" next to it. To the right of the list is an "Add New Patient" button with a yellow box with the number "2" next to it. Below the "Add New Patient" button are seven rows of "Delete" and "Manage" buttons, with a yellow box with the number "3" next to the first "Manage" button.

The Doctor Account presents current patients (1), and the available credits (2). The MANAGE (3) button accesses patient account

Add New Patient

To add a new patient is as simple as clicking the ADD NEW PATIENT button on the Doctor Account main page. The required fields are Firstname, surname, email address, and the time zone the patient lives in. Once saved, the new patient will appear in the patient listing.

This screenshot is identical to the previous one, but with a yellow box containing the number "1" highlighting the "Add New Patient" button.

In Doctor Account click ADD NEW PATIENT (1), then complete form (2) and save. New patient will appear in listing.

SMART Dr David Gower Logout

Welcome back
Dr David Gower

Patient Accounts Edit My Details Purchase Credits Credit Balance: 42

Filter by Organisation or Name

Add New Client

Title: Select a title... First Name: Enter a first Name...

Surname: Enter a surname... Email Address: Enter a email address...

Sex: Please select a sex... Mobile: Enter a mobile number...

Timezone: Select a timezone...

Save Client **2**

Active Client Accounts

- Anna Briad
- Becky james
- Denise Lawrence
- Donna Owens
- Janine Walsh
- Julie Walsh

Add New Patient

Delete Manage

Issue Patient with Assessment

Once a patient has been created, you can generate an Assessment link for the patient. Click **MANAGE** next to the patient's name, then click **ISSUE ASSESSMENT**.

SMART Logged in as Dr David Gower Logout

Welcome back
Dr David Gower

Patient Accounts Edit My Details Purchase Credits Credit Balance: 42

Filter by Organisation or Name **1**

Active Client Accounts

- Anna Briad
- Becky james
- Denise Lawrence
- Donna Owens
- Janine Walsh
- Julie Walsh

Add New Patient

Delete Manage **2**

Delete Manage

Delete Manage

Delete Manage

Delete Manage

Delete Manage

Search (1) for patient name if necessary, then click **MANAGE** (2). Click **ISSUE ASSESSMENT** (3) and scroll to the bottom of pop-up to **SEND** (4).

SMART

Client: Anna Briad

Scheduled Client Communications

No Scheduled Communications

History

Subject

HORMONE ASSESSMENT for [user-firstname] [user-surname]

SMART

How it works

About Dr Ken Speidel

Login

Dr David Gower Logout

Issue Assessment

13/11/2023 08:24

Source

Hi [user-firstname],

I would like you to complete an online assessment to assist in capturing the symptoms you are experiencing. The assessment comprises four sections.

1. Medical history
2. Lifestyle
3. Family Medical history
4. Symptom Questionnaire

Send/Schedule Item

Type Date/Time

Email 12/11/2023 15:04

Email 12/11/2023 15:03

Email 12/11/2023 14:05

Email 12/11/2023 14:04

Email 12/11/2023 14:00

Schedule an Assessment for a future date

When the email template for the Assessment link appears, you can select a future time and date to issue an Assessment link. This may be beneficial if you wish to reassess the patient's symptomatology in a specific period (e.g., in three months). Simply click on the listed date to adjust to a future time and date (.1).

Send Patient Assessment

1. Enter a Subject.
2. Adjust the date and time you want to send the message.
3. Adjust email content if required.
4. Click "Send/Save Item"

Mail Merge options:

[user-firstname] [user-surname] [user-phone] [user-mobile] [user-email],
[assessment-link], [org-email-signature]

Subject:

HORMONE ASSESSMENT for [user-firstname] [user-surname]

Schedule Date/Time:

14/11/2023 13:05

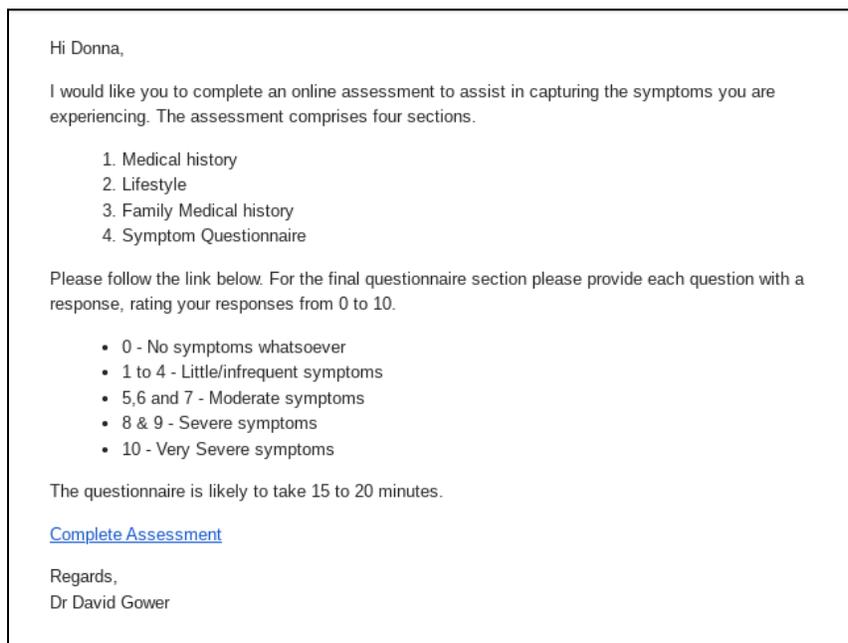
November 2023

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4

Example Patient Assessment Email Link

The website generates an email on behalf of the treating Doctor. The email is sent from support@hormoneassessment.com

The patient's first name is referenced, and they receive a brief overview of the Assessment and the email link—example pictured below.



Pictured to the left is the default email that is issued to patients. The email is addressed to patients first name, and signature block contains Dr's name.

Accessing Patients Completed Report

The report is generated instantaneously when a patient completes the Assessment. Select the patient, click MANAGE, and then ASSESSMENTS. Check the status, then click OPEN REPORT. The report is generated in a PDF format over 4-pages.

SMART Logged in as Dr David Gower Logout

Back to All Clients Issued Assessments Edit Patient Details **Assessments**

Date Created	Status	Date Completed	
10/11/2023	Complete 1	10/11/2023	Open Report 2

SMART How it works About Dr Ken Speldel Register Privacy Login

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Having clicked **ASSESSMENTS** in the patients Account you can check the **STATUS (1)** of issued Assessments, and then review the **OPEN REPORT (2)**.

Purchasing Assessment Credits

Each assessment costs one credit. Credits can be purchased in bundles. As payment is made the credit bundle is added to the Doctor Account balanced as pictured in the top right of the portal. Payments are managed by the secure Stripe Payment Gateway.

SMART Logged in as Dr David Gower Logout

Welcome back
Dr David Gower

Patient Accounts Edit My Details **Purchase Credits** **1** Credit Balance: 42

- 20 Credits (\$100.00 AUD)
- 50 Credits (\$200.00 AUD)
- 100 Credits (\$300.00 AUD) **2**
- 200 Credits (\$500.00 AUD)
- 1000 Credits (\$1900.00 AUD)

Buy Credits

SMART How it works About Dr Ken Speldel Login

In the Doctor Account simply click **PURCHASE CREDITS (1)** and then select bundle **(2)**. You will enter Stripe Payment Gateway.

Frequently Asked Questions

If I purchase credits, do they expire?

Credits that are unused within 24 months will expire.

Once an assessment link has been sent, how long does a patient have to complete the Assessment?

A patient has up to 14 days to complete the Assessment. If the Assessment has not been used, the link will expire.

What is one credit worth?

One credit represents one issued Patient Assessment link.

What happens if I forget my password?

You can re-establish a new password by clicking FORGOTTEN PASSWORD on the login page. You must reference the email address linked to the account.

I have colleagues in my medical practice who would also like to use the SMART system. Ideally, we would like to purchase “credits” collectively. Is there any way we can distribute credits amongst ourselves?

Yes, but it will require an overarching “Management Account.” A management account allows an administrator within your practice to purchase and distribute credits to individual Doctor Accounts. The administrator can add credits to a personal Doctor Account and subtract them should they need to redistribute.

How quickly is the Patient Report created and available for review once the Patient completes the Assessment?

The report is generated instantaneously once the Patient completes the Assessment. The report can be found by clicking MANAGE next to the patient's name in the patient listing. Then click ASSESSMENTS to see any completed reports.

Can I edit a patient's contact email?

Click MANAGE next to the Patient's name, and then EDIT DETAILS.