



**RX<sup>2</sup><sup>®</sup>**

Pharmacy Technology That Squares

Personal 

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# Overview

The cornerstone of any next generation pharmacy is the ability to provide a significantly better patient experience.

Technology fuels the delivery of that experience.

From patient onboarding to refill management – the right technology makes it look easy.



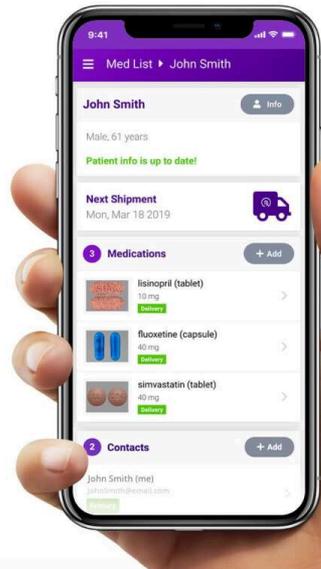
## **RX<sup>2</sup> MOBILE**

Surrounding the patient with care.  
Our mobile app makes it easy to take your pharmacy with you.



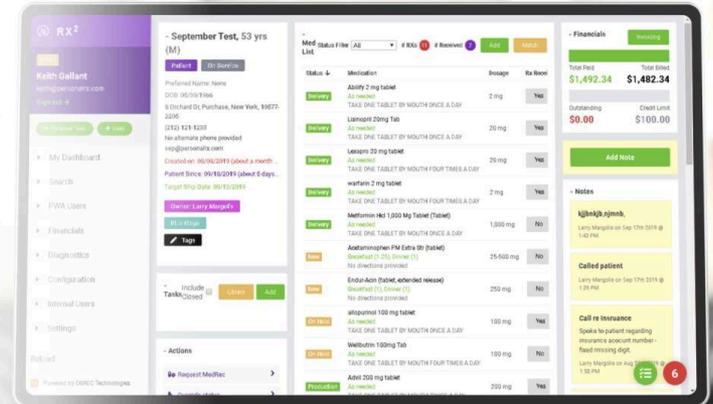
## **RX<sup>2</sup> ADMIN**

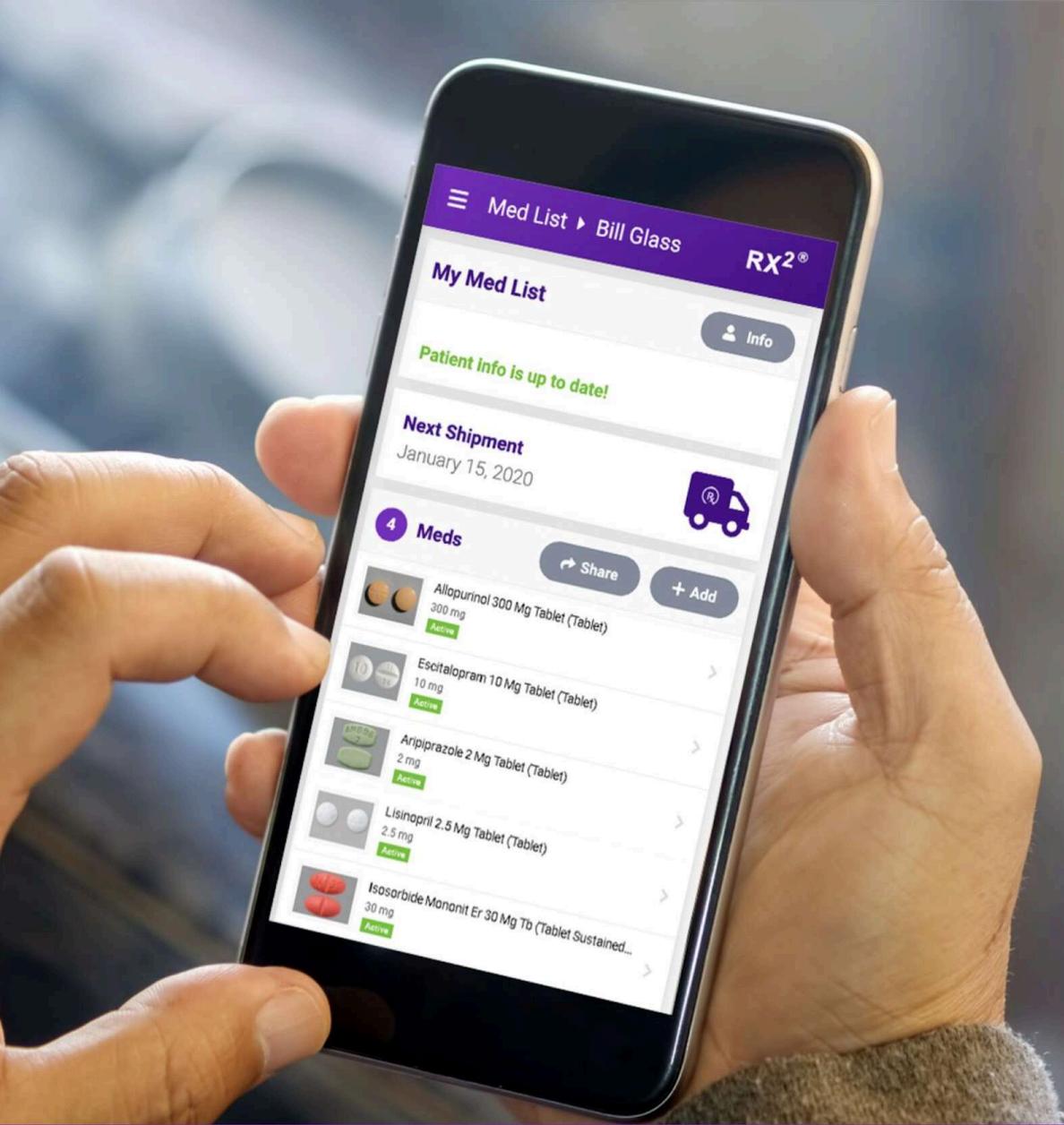
Driving next gen pharmacy.  
Our administrative app makes it easy for staff to provide a VIP pharmacy experience.



- **RX<sup>2</sup> Mobile** promotes adherence and a team approach to patient health.
- It puts the pharmacy at the fingertips of the patient - and caregivers too.
- Med Reminders, Location Calendar, Share My Meds, Delivery Info, Accounting and more.

- **RX<sup>2</sup> Admin** runs next gen pharmacy operations end-to-end.
- From patient registration to fulfillment, delivery, billing, refill management, QA and more.
- Extensible and agile – integrates with EHRs and other health systems.





**RX<sup>2</sup>**<sup>®</sup>

Surrounding the patient with care.

My Med List is always in sync with pharmacy dispensing.

Share My Meds makes it simple to send a PDF of the med list to the doctor in seconds.



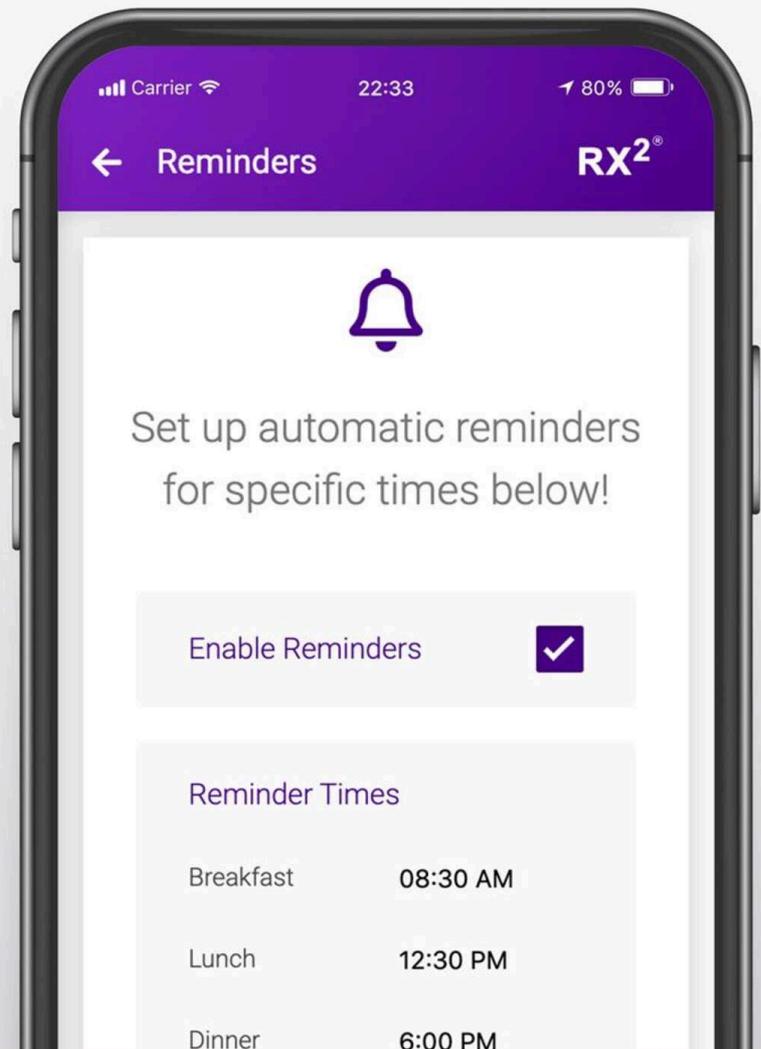
**RX<sup>2</sup>** MOBILE

Personal 

# Med Reminders

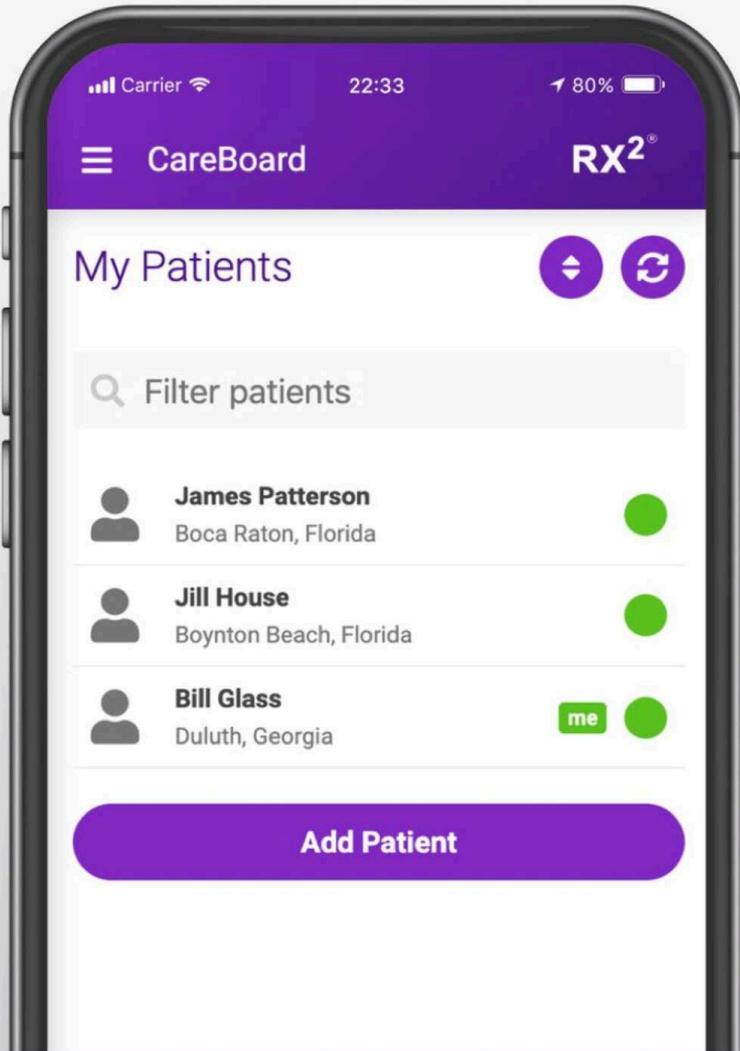
Get notified when it's time to take your next dose.

- Check "Enable Reminders"
- Adjust reminder times to fit your schedule.
- Select your preferred type of reminder. A text message, a phone call or a nudge from "Alexa".



## Caregiver Support

- Use the “Add a Contact” feature to invite a family member, caregiver or advocate to the patient’s account.
- From the CareBoard, a caregiver selects the patient they wish to access.



**RX<sup>2</sup> ADMIN**

Admin 721 21

**Philip Glass**  
PhilipGlass27@aol.com  
Sign out →

+ Personal Task + Lead

- My Dashboard
- My Settings
- Search
- Acquisition Workflow
- Refill Workflow
- Group Shipping
- Financials
- Reports
- App Users
- PRX Users
- Configuration
- Diagnostics

Go to Last Patient

Reload

**+ Adam Smith, 54 yrs (M)**

Patient On Service

Preferred Name: Sep  
DOB: 05/30/1966  
8 ORCHARD DR, PURCHASE, New York, 10577-2205  
sep@personalrx.com

Mobile: (917) 685-8188  
Alternate: No alternate phone provided  
Created on: 08/08/2019 (about 10 months ago)  
Patient Since: 09/18/2019 (about 9 months ago)  
Batch: P14 → next date 06/12/2020

Owner: Lawrence M. ... Squaw Valley

Tags

**- Workflow**

- Request MedRec (Patient)
- Create Ad-hoc Fill List
- Update Owner & Batch
- Override status (Admin)
- Mark as closed

**- Tasks** Show All Library Add

**- Actions**

- Send initial RX<sup>2</sup> invitation
- Create Survey
- Auto-Fill Requested

Ongoing Fill List #7 (Status: New)

# RXs 20 # Received 20 Add Match Auto Update

| Status                 | Medication                                     | Dosage       | Supply | Gathering Status | Prescr           |
|------------------------|--|--------------|--------|------------------|------------------|
| Production             | Allopurinol 300 Mg Tablet<br>No notes provided | 300 mg       | 0      | Complete         | Dr. Doc (\$16).4 |
| Fill in Progress       | TAKE ONE TABLET ONCE DAILY                     |              |        |                  |                  |
| Waiting for Check      |  |              |        |                  |                  |
| On Hold                | Escitalopram 20 Mg Tablet<br>No notes provided | 20 mg        | 0      | Complete         | Dr. Doc (\$16).4 |
| Refills Remaining      | TAKE ONE TABLET BY MOUTH FOUR TIMES A DAY      |              |        |                  |                  |
| Cancelled              |  |              |        |                  |                  |
| Production             | Tmp/Smz 80-400mg Tab<br>No notes provided      | 400 mg-80 mg | 0      | Complete         | Dr. Law (\$68).2 |
| Fill in Progress       | TAKE ONE TABLET BY MOUTH TWICE A DAY           |              |        |                  |                  |
| Waiting for Data Entry |  |              |        |                  |                  |
| Hidden                 | Wellbutrin 100mg Tab<br>No notes provided      | 100 mg       | 0      | Complete         | Dr. Doc (\$16).4 |
| On Hold                | TAKE ONE TABLET BY MOUTH FOUR TIMES A DAY      |              |        |                  |                  |
| Cancelled              |  |              |        |                  |                  |

**- Med List** Add Custom

**- Fill Lists**

- Fill List #7 (Batch: P14 - May 13, 2020)  
Created on May 6th 2020 @ 9:22 PM

**- Shipments** Add Custom Add

- Refill - May 21, 2020  
Status: ACCEPTED | Carrier: UPS  
Tracking No: 1Z59388YYN12853051  
Created on May 21st 2020 @ 3:04 PM
- Custom - May 14, 2020  
Status: ACCEPTED | Carrier: FEDEX  
Tracking No: 392865564025  
Created on May 14th 2020 @ 5:43 PM
- Refill - Feb 28, 2020  
Status: DELIVERED | Carrier: UPS  
Tracking No: 1Z59388YYN19062830

**- Financials** Invoicing

Total Paid: **\$1,088.72** Total Billed: **\$1,088.72**

Outstanding: **\$0.00** Credit Limit: **\$100.00**

**- Notes** Add Note

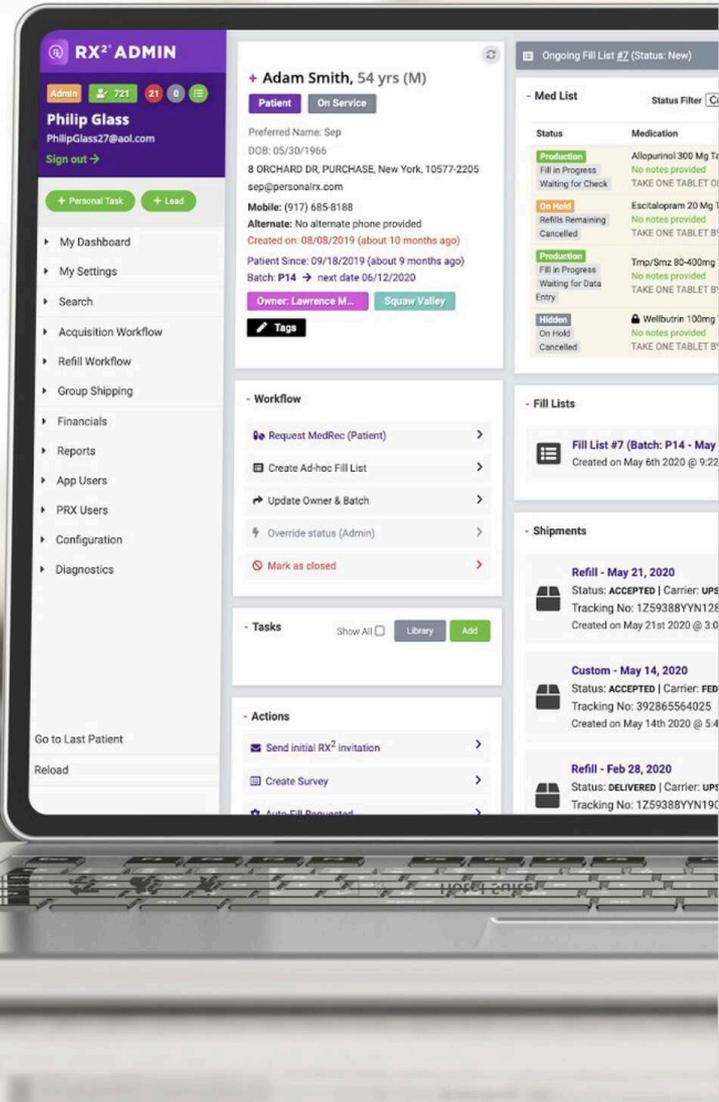
- CRITICAL  
kikikikiki  
Lawrence Margolis on Mar 19th 2020 @ 10:25 AM
- CRITICAL  
Auto-Fill Requested  
Lawrence Margolis on Feb 29th 2020 @ 1:48 PM
- CRITICAL  
Auto-Fill Requested  
ok  
Lawrence Margolis on Jan 22nd 2020 @ 3:06 PM
- SMS to (917) 768-58188  
Thank you for speaking with me. To learn more about PersonalRX please visit https://personalrx.com. Lawrence Margolis, (212) 430-3030.  
Lawrence Margolis on Apr 3rd 2020 @ 7:39 AM

**- MEDREC<sup>2</sup>** Add

- MedRec #120 (11 Items)  
Approved  
Created on Mar 12th 2020 @ 3:36 PM

# Patient CRM

- Visibility and measurement at every stage of the pharmacy patient life cycle.
- Track lead generation sources, referrals and web-based patient registration.
- HIPAA- and PCI-compliant tools protect patient information, while revealing the status and next steps required for optimal customer service.
- Reports and dashboards reveal trends and outliers, along with opportunities for improvement and growth.



# Patient CRM

- Medication lists indicate Rx procurement and other statuses, notes, Hours of Administration (HOA), packaging and more.
- Color schemes and pulsing light brings attention to pressing "Alert" notifications.
- Counts of notifications and records awaiting action in queues associated with the system user are always present.

# Workflow Management

- Visibility, measurement, system prompts and guardrails at every stage of production, fulfillment, delivery, QA and refill cycles.
- Integrates state-of-the-art billing, shipping and pharmacy robotics software.
- Drives and tracks workflow - from patient acquisition to fulfillment - through refill management processes.
- Reports and dashboards reveal trends and outliers, along with opportunities for improvement and growth.

## Next Gen Pharmacy

- Integrated packaging, delivery and refill management.
- RX<sup>2</sup> Admin and RX<sup>2</sup> Mobile are in sync – customer service reps sees consumer views.
- Custom built to support Home Delivery and adherence packaging.



# Acquisition Workflow

**RX<sup>2</sup> ADMIN**

Admin 725 1 0

**Keith Gallant**  
keith@personalrx.com  
Sign out →

+ Personal Task + Lead

- My Dashboard
- My Settings
- Search
- Acquisition Workflow**
- Refill Workflow
- Group Shipping
- Financials
- Reports
- App Users
- PRX Users
- Configuration
- Diagnostics

Go to Last Patient  
Reload

Patient Acquisition Workflow

Lead Validation → RX Gathering → MedRec → Confirmation → Patient

Filter by patient name or tag

Assignment Keith Gallant (you)

| 5 Items Needing Attention   | 40 Items In Progress   |
|---|--|
| <p>James Stewart, 45 yrs<br/>Target Start Date: None<br/>Created on 06/16/2020 (about 10 minutes ago)<br/>Owner: None</p> <p>Lead New Integration DMS</p>   | <p>Rita Calistone, 25 yrs<br/>Target Start Date: None<br/>Created on 05/21/2020 (about a month ago)<br/>Assigned to Owner: Keith Gallant</p> <p>Lead In Progress</p>                     |
| <p>Rose Johnstone, 73 yrs<br/>Target Start Date: None<br/>Created on 06/16/2020 (about 15 minutes ago)<br/>Owner: None</p> <p>Lead New Integration DMS</p>  | <p>Ignacio Franklin, 38 yrs<br/>Target Start Date: None<br/>Created on 04/07/2020 (about 2 months ago)<br/>Assigned to Owner: Keith Gallant</p> <p>Lead In Progress</p>                  |
| <p>Franlyn Bartone, 23 yrs<br/>Target Start Date: None<br/>Created on 06/16/2020 (about 23 minutes ago)<br/>Owner: None</p> <p>Lead New Integration DMS</p> | <p>Phoebe Rollins, 29 yrs<br/>Target Start Date: None<br/>Created on 04/02/2020 (about 2 months ago)<br/>Assigned to Owner: Keith Gallant</p> <p>Lead In Progress</p>                    |
| <p>Marilyn Stone, 62 yrs<br/>Target Start Date: None<br/>Created on 06/16/2020 (about 43 minutes ago)<br/>Owner: None</p> <p>Lead New Integration DMS</p>   | <p>Alejandro Ubieta, 52 yrs<br/>Target Start Date: None<br/>Created on 04/02/2020 (about 2 months ago)<br/>Assigned to Owner: Keith Gallant</p> <p>Lead In Progress None PRX Website</p> |
| <p>Mauricio Lafayette, 46 yrs<br/>Target Start Date: None</p>   | <p>Craig Henderson, 76 yrs<br/>Target Start Date: None</p>   |

# Fulfillment Workflow

The screenshot displays the 'Fulfillment Workflow' interface in the RX2 Admin system. The workflow is visualized as a sequence of steps: Confirmed, In Progress (with sub-steps for Dispenser Build and RPh Verification), Consolidation, Shipping QC, Shipment Ready, and Shipped. The main content area shows a list of 27 items, with the first five items detailed below:

| Patient Name       | Age    | Order Type           | Batch / Start Date                  | Assigned Owner  | Status    | Actions                          |
|--------------------|--------|----------------------|-------------------------------------|-----------------|-----------|----------------------------------|
| James Stewart      | 45 yrs | Cycle Fill List      | Batch: P22 / Start Date: 06/21/2020 | Sonja Pusaver   | Confirmed | Confirmation buttons, trash icon |
| Rose Johnstone     | 73 yrs | Cycle Fill List #455 | Batch: P22 / Start Date: 06/21/2020 | Sonja Pusaver   | Confirmed | Confirmation buttons, trash icon |
| Franlyn Bartone    | 23 yrs | Cycle Fill List #464 | Batch: P21 / Start Date: 06/20/2020 | Serena Williams | Confirmed | Confirmation buttons, trash icon |
| Marilyn Stone      | 62 yrs | Cycle Fill List #543 | Batch: P21 / Start Date: 06/20/2020 | Sonja Pusaver   | Confirmed | Confirmation buttons, trash icon |
| Mauricio Lafayette | 46 yrs | Cycle Fill List      | Batch: P20 / Start Date: 06/19/2020 | Yasmin Leon     | Confirmed | Confirmation buttons, trash icon |

# Refill Workflow

The screenshot displays the 'Refill Workflow' interface in the RX2 ADMIN system. The workflow is shown as a sequence of steps: Pending Patients → Mid-Cycle → Processing (highlighted in orange) → RPh Check → Confirmation. A 'Batches' button is visible in the top right corner.

The main content area shows a list of patients with the following details:

- James Stewart, 45 yrs - Cycle Fill List**  
Batch: P22 / Start Date: 06/21/2020  
Assigned to Owner: Jesus Cabrera  
Integration, Pcall MD, DMS  
Cycle Fill List #605, New, [Green Checkmark]
- Rose Johnstone, 73 yrs - Cycle Fill List #455**  
Batch: P22 / Start Date: 06/21/2020  
Assigned to Owner: Jesus Cabrera  
Integration, DMS, GREEN  
Cycle Fill List #634, New, [Green Checkmark]
- Franlyn Bartone, 23 yrs - Cycle Fill List #464**  
Batch: P20 / Start Date: 06/19/2020  
Assigned to Owner: Jesus Cabrera  
JESPY  
Cycle Fill List #607, New, [Green Checkmark]
- Marilyn Stone, 62 yrs - Cycle Fill List #543**  
Batch: P20 / Start Date: 06/19/2020  
Assigned to Owner: Jesus Cabrera  
JESPY  
Cycle Fill List #610, New, [Green Checkmark]
- Mauricio Lafayette, 46 yrs - Cycle Fill List**  
Batch: P20 / Start Date: 06/19/2020  
Assigned to Owner: Jesus Cabrera  
[Green Checkmark]  
Cycle Fill List #431, New, [Green Checkmark]

The interface includes a search bar for filtering by patient name or tag, an assignment dropdown set to 'Jesus Cabrera', and sorting options by 'Start Date' (Ascending/Descending).

# Medication Reconciliation

**RX<sup>2</sup> ADMIN**

Ongoing Fill List #7 (Status: New)

Medications:

- Celecoxib 100 Mg Capsule  
Hidden  
As needed  
TAKE ONE TABLET BY MOUTH ONCE A DAY  
Dr. Doctor Test, (516) 408-3999  
PackagedDrug 69097042212
- Avapro 150mg Tab  
Hidden  
As needed  
TAKE ONE TABLET BY MOUTH ONCE A DAY  
Dr. Doctor Test, (516) 408-3999  
PackagedDrug 00087277231
- Warfarin Sodium 2mg Tab  
Hidden  
As needed  
TAKE ONE TABLET BY MOUTH FOUR TIMES A DAY  
Dr. Doctor Test, (516) 408-3999  
PackagedDrug 68382005301
- Wellbutrin 100mg Tab  
Hidden  
As needed  
TAKE ONE TABLET BY MOUTH FOUR TIMES A DAY  
Dr. Doctor Test, (516) 408-3999  
PackagedDrug 00173017855
- Warfarin Sodium 2mg Tab  
Hidden  
As needed  
TAKE ONE TABLET BY MOUTH ONCE A DAY  
Dr. Doctor Test, (516) 408-3999  
PackagedDrug 68382005301
- Venlafaxine Hcl Xr 150mg Cer  
Hidden

**MEDREC<sup>2</sup>**

Approve Reject

Notes & Comments

- 10 Drug Drug Interactions**
- 0 Drug Food Interactions**
- 0 Side Effects**
- 11 Geriatric Precautions**
- 13 Lactation Precautions**
- 0 Pediatric Precautions**
- 11 Pregnancy Precautions**

**3 - Moderate Interaction: Assess the risk to the patient and take action as needed.**  
ARIPRAZOLE 2 MG TABLET and BUPROPION HCL 100 MG TABLET may interact based on the potential interaction between ARIPRAZOLE and BUPROPION.

- Concurrent administration of a strong CYP2D6 inhibitor with aripiprazole may result in elevated levels of and toxicity from aripiprazole.(1-4) Concurrent use may also result in additive effects on the seizure threshold, increasing the risk of seizures.(5,6)

**3 - Moderate Interaction: Assess the risk to the patient and take action as needed.**  
VENLAFAXINE HCL ER 150 MG CAP and IBUPROFEN 200 MG TABLET may interact based on the potential interaction between SSRI, SNRIS and SELECTED NSAIDS; ASPIRIN.

- Concurrent use of a selective serotonin reuptake inhibitor(1-7,13) or a serotonin-norepinephrine reuptake inhibitor(8-10) and a NSAID may result in bleeding.

**3 - Moderate Interaction: Assess the risk to the patient and take action as needed.**  
BUPROPION HCL 100 MG TABLET and VENLAFAXINE HCL ER 150 MG CAP may interact based on the potential interaction between BUPROPION and SNRIS; SSRI.

- Concurrent use of bupropion and a SSRI or SNRI may result in additive effects on the seizure threshold, increasing the risk of seizures.(1,2)Concurrent use may also increase levels of and side effects from antidepressants metabolized by CYP2D6, such as citalopram, duloxetine, fluoxetine, fluvoxamine, paroxetine, and venlafaxine.(3)

**3 - Moderate Interaction: Assess the risk to the patient and take action as needed.**  
ESCITALOPRAM 20 MG TABLET and CELECOXIB 100 MG CAPSULE may interact based on the potential interaction between SSRI, SNRIS and SELECTED NSAIDS; ASPIRIN.

- Concurrent use of a selective serotonin reuptake inhibitor(1-7,13) or a serotonin-norepinephrine reuptake inhibitor(8-10) and a NSAID may result in bleeding.

**3 - Moderate Interaction: Assess the risk to the patient and take action as needed.**  
BUPROPION HCL 100 MG TABLET and ESCITALOPRAM 20 MG TABLET may interact based on the potential interaction between BUPROPION and SNRIS; SSRI.

# Shipping

### Refill Shipment for September Test

Shipment Date: Jun 16, 2020 | Status: NEW  
Item Count: 7

**No tracking number**  
Tracking information will be displayed once shipping label has been created

#### Shipping Label

Address  
[Default] 8 ORCHARD DR, PURCHASE, 10577-2205

| Shipping Service | Confirmation | Options | Package Code | Weight | Unit   |
|------------------|--------------|---------|--------------|--------|--------|
| FedEx 2Day®      | Delivery     | None    | None         | 0.00   | Pounds |

Create Shipping Label

Group Shipment: Squaw Valley

Items in this shipment:

- Avapro 150mg Tab  
NDC: 00087277231 | Days Supply: 30
- Bupropion Hcl 100 Mg Tablet

# Billing and Accounts Receivable

The screenshot displays the RX2 ADMIN interface for a patient named "September Test, 54 yrs (M)". The main dashboard shows financial summary:

| PAID       | BILLED     | OUTSTANDING | CREDIT LIMIT |
|------------|------------|-------------|--------------|
| \$1,088.72 | \$1,088.72 | \$0.00      | \$100.00     |

Below this, there are sections for "Invoices for September Test" and "Transactions".

**Invoices for September Test:**

| Invoice #     | Date         | Status | Amount  |
|---------------|--------------|--------|---------|
| INV #00010203 | Oct 02, 2019 | Paid   | \$62.31 |
| INV #00010346 | Oct 05, 2019 | Paid   | \$37.99 |
| INV #00011437 | Nov 16, 2019 |        |         |
| INV #00011894 | Dec 07, 2019 |        |         |
| INV #00013659 | Feb 28, 2020 |        |         |
| INV #00015320 | May 21, 2020 |        |         |

**Transactions:**

TXN #4917: Other  
TEST - NO REAL BALANCE  
Date: 06/10/2020, logged by Susan Nixon  
Amount: \$1,088.72

An "Invoice" modal window is open, showing details for invoice #00010346:

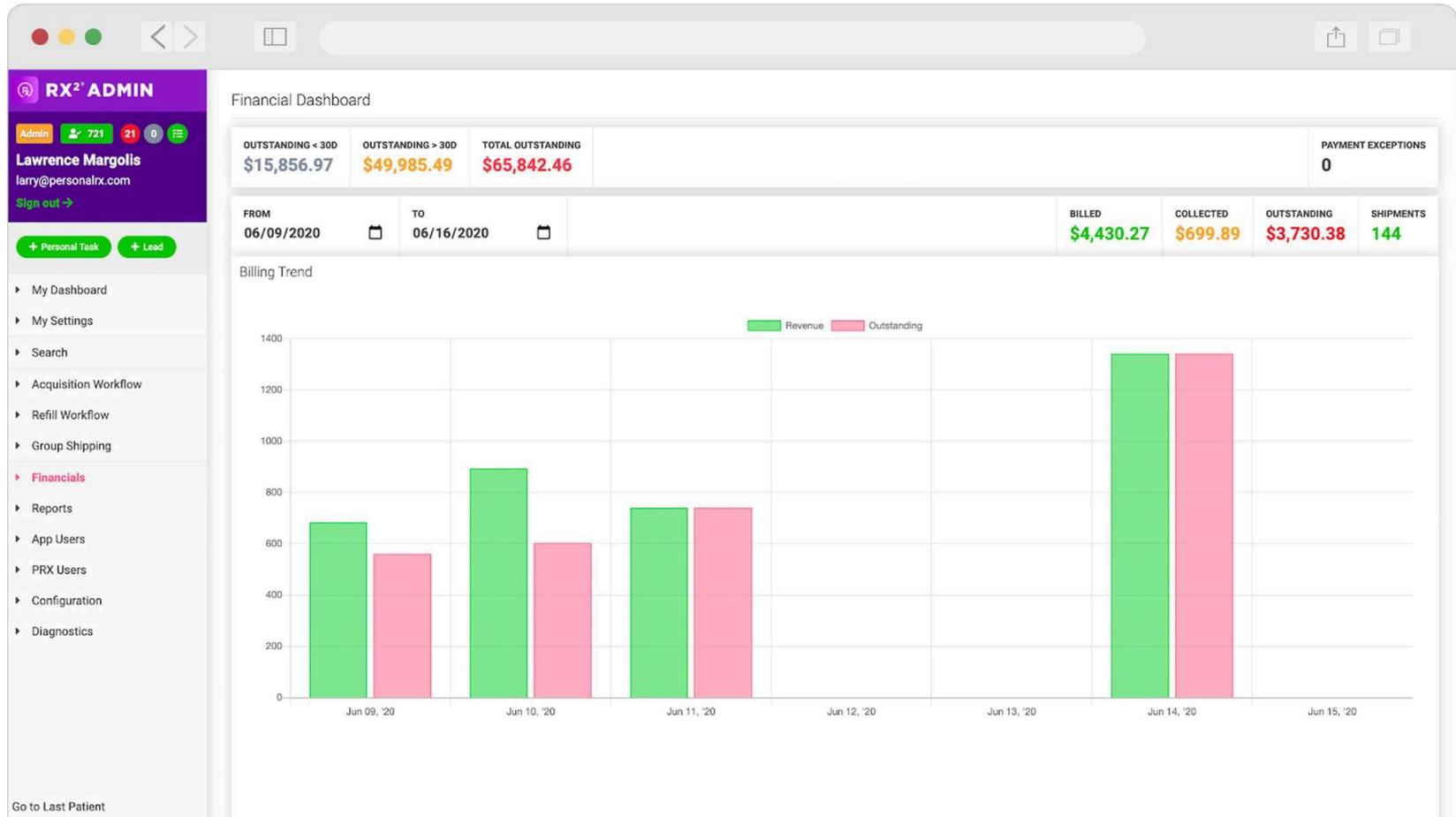
**Invoice #00010346** (Paid)

| INVOICE # | REFERENCE      | INVOICE DATE | OUTSTANDING |
|-----------|----------------|--------------|-------------|
| 00010346  | Shipment #9323 | 10/05/2019   | \$0.00      |

| Item                              | Date Shipped | Amount/Copay | Tax    | Total   |
|-----------------------------------|--------------|--------------|--------|---------|
| penicillin V potassium 500 mg ... | 10/05/2019   | \$37.99      | \$0.00 | \$37.99 |

Additional fields include "NOTES & TERMS" (Optional) and "Total Due" (\$37.99).

# Financial Analysis





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Great technology lives  
in the background.

It's the force behind the brand we've  
built, the relationships we value and  
the goals we've achieved.

Best of all, it makes life easier and creates  
better health outcomes for our patients.



To learn more or get in touch:

visit [personalrx.com](https://personalrx.com)

email [invest@personalrx.com](mailto:invest@personalrx.com)