

# Quick Reference Guide

Let's make rep management seamless.

## We're here to help!

✉ [support@rxvantage.com](mailto:support@rxvantage.com)

☎ 866.464.2157

👉 Click the help icon in the left navigation menu for live chat support and FAQ articles.

## Let's make rep management seamless.

This reference guide provides an overview of your RxVantage account. If you have further questions, our customer support team is happy to help: 866-464-2157.

Live chat support is also accessible within the help section of your account—simply click the **Help** icon on your account page.

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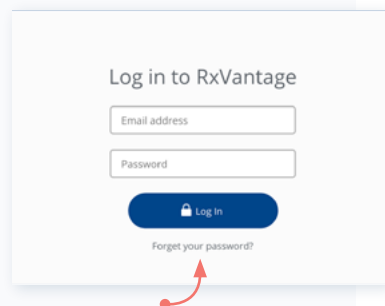
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#### Access Your Account or Reset Your Password

You can access your account from your preferred device (desktop, tablet, mobile) using supported web browsers (Chrome, Firefox, Safari, Microsoft Edge).

- Visit <http://my.rxvantage.com/login> to login to your account.
- To receive a link to reset your password, click **Forget your password?** and enter your email address.



The screenshot shows the 'Log in to RxVantage' page. It features two input fields: 'Email address' and 'Password'. Below these fields is a blue 'Log in' button with a lock icon. Underneath the button is a link that says 'Forget your password?'. A red arrow points from this link towards the bottom right of the page.



# Rep Visits

## View and Edit Your Calendar

Upon login, your account automatically opens to your calendar. This calendar can be accessed anytime by clicking the Rep Visits tab on the left navigation bar. When adding or changing appointments, always be sure to click Save!

### Add a New Appointment

- From your calendar view, click on the **+ADD** button and follow the prompts to enter the appointment details.



### Add a Recurring Appointment


You can add recurring appointments from your calendar view or within the Settings tab on the left navigation bar.

- Calendar View:** From the calendar view, add a new appointment, select **Recurring** within the appointment details, and set the frequency.
- Settings Tab:** From the Settings tab, navigate to Recurring Appointments on the top menu bar, click the **+Add** recurring appointment button, and set the appointment details and frequency.

### Edit Appointments (Cancel, Delete, Assign a Rep, Change Times)

To edit any appointment, click the appointment in the calendar view, then click the pencil icon.



- Remove a Rep:** Click **Remove** next to rep's name, then save. This will leave the appointment open for other reps to book.
- Assign a Rep:** Click **Assign**, search for the rep's name, select, and save.
- Reassign a Booked Appointment:** Combine the above steps and save.
- Delete an Appointment:** Click **Delete** appointment and follow the prompts.
- Close the Office:** Within your calendar, click on the **three dots**  next to the date you want to close and follow the prompt. Remember, you can set office hours and holiday closures within Settings.
- Add Video Conferencing:** Click **Require Video Conferencing**, select meal preferences and save. [See Virtual Meetings](#) section for more details.
- Create in-office visit policy:** Set expectations for rep visits without having to call or email them. Require reps to acknowledge your policies when confirming an appointment.
- Select the Product News to Prioritize:** Utilizing RxVantage Beacon, reserve specific appointments for new product information including approvals, indications, label changes, clinical data updates, and more.



#### Quick Tips

- Use the drop-down in the top right corner of the calendar to change the view (list, week, month).
- Appointments are color-coded.  
**Green** = Confirmed **Orange** = Booked, not yet confirmed **Grey** = Open
- If you oversee multiple offices or locations, you will see a drop-down in the top menu bar next to the bell icon. This will allow you to switch location or calendar.



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# Virtual Meetings

## Run Hassle-Free Remote Conferences

### Make Any Meeting Virtual

Requiring video conferencing for an appointment will automatically add a unique join link, dial-in number, and access PIN to the appointment details.

- **Add Video Conferencing to a New Meeting:** Create the appointment as you would any other meeting, and simply check **Require Video Conferencing** box in the appointment details. That's it!
- **Convert an Existing Meeting:** Navigate to the appointment you want to convert from in-person to virtual and click the pencil icon. Check the **Require Video Conferencing** box and save.
- **Edit or Add Recurring Appointments:** When adding or editing recurring appointments, select **Require Video Conferencing** in the appointment details and follow the prompts to either add video conferencing for all appointments or only appointments in a specified date range. Make these changes within your calendar or from the Recurring Appointments page within your Settings tab.

### Add Meal Preferences

When video conferencing is added to any appointment, a drop-down menu will appear for you to indicate catering preferences. This information will be automatically sent to your life science expert when they book and confirm the appointment.

Edit headcount, delivery information, dietary restrictions, and any other meal preferences in the ["Policies and Preferences"](#) page within your Settings tab.

### Launching and Joining a Virtual Meeting

Launch and join Virtual Meetings from your calendar appointment, automated email reminder, or from an email address with the secure join link.

- **From Meeting Details:** Click the **Join video conference** link within your calendar appointment.
- **From Automatic Email Reminder:** Click the **Join video conference** link within your reminder email. These emails are automatically delivered to all attendees one hour prior to the meeting and include the secure join link and dial-in information.
- **Using an Email Address:** For providers without an RxVantage account, they can join the meeting using the secure join link. They will be prompted to enter their name and email address. Authenticated attendees can approve (or deny) their entrance to the Virtual Meeting.
- **Virtual Waiting Room:** When joining a meeting, you will first be directed to the virtual waiting room. Select your audio and video access the click **Join the meeting** to enter the video conference.



#### Quick Tips

- Supported browsers are Chrome, Firefox, Safari, and Edge.
- Add staff and providers to meetings so they receive automatic email reminders with join information.
- Allow microphone and webcam access from your computer settings.
- Screen-sharing is currently only accessible from a desktop or laptop computer.



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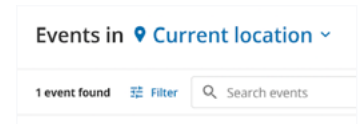
# Events

## Discover and RSVP to Educational Events

RxVantage Events is built directly into the RxVantage platform and designed to facilitate engagement between you and the Life Science experts you depend on. Event organizers create event listings, define invitees, and publish to our network of Practices for your visibility.

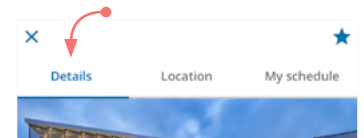
### Browse Available Events

Once in the Events section, you will see any event you have been invited to plus all events that are “public,” meaning, they are available to the entire RxVantage office network. To narrow your search, you can sort and filter through available events based on your desired criteria. You can also update your office preferences to let reps know you’d like to receive invitations to speaker programs and events via RxVantage Events for convenience.



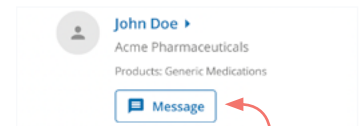
### View Event Details

View the most important event information in the “event details” section. Important details include: date/time/location, description, relevant attachments, point of contact, speaker bios, attendees, and how a particular event aligns with your calendar.



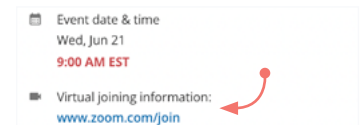
### Message the Hosts

You can message the event’s point of contact directly using the in-app messaging system. Simply click the **Message** button under the **Details** tab to ask the event creator any questions you may have before or after the event.



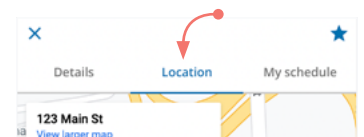
### Attend Virtually

We support virtual and in-person events. If an event is virtual - you’ll find the joining information accessible from within the event details section.



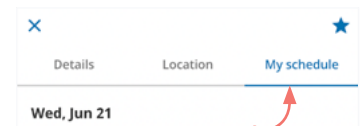
### Attend in-person

Any event that contains an in-person location will have a dedicated **Location tab**. The **Get Directions** button will take you to Google maps for turn-by-turn directions to the venue.



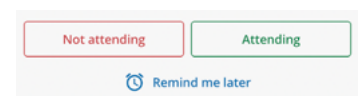
### Utilize the “My Schedule” Tab

The **My Schedule** tab ensures you are not double-booking yourself by showing how each event fits into your schedule. This feature populates with rep appointments and/or other events on your RxVantage office calendar on the same date.



### RSVPs

At the bottom of every tab, there is an opportunity for you to RSVP to, and register for, the event (if the organizer requires registration). If you are unsure if you can make it to an event, select the **Remind me Later** option to be reminded down the road to RSVP. You will find all events you have RSVP’d to in the **Attending** tab.





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# Messages

## Instantly Connect With Reps

Messages provides a direct, reliable communication channel between you and all the reps in your area.

- **Individual Messages:** Send an individual message to a rep from the Messages tab or within their rep profile (see Reps section below for more details).
- **Reliable Mass Communication:** Click the **+New** message button on the top left of your inbox in the Messages tab, then select the specific reps or group of reps you want to communicate with, type your message, and send. Everyone in the group will be notified immediately and can respond back to you if needed.
- **Secure and Private:** Your personal contact information is always kept private and unsolicited messages are not permitted in RxVantage.
- **Delivered to Your Inbox:** Responses to your messages are available in your RxVantage account and are delivered directly to your email inbox, if you have turned on this notification in your account setting.

# Reps

## Your Digital Rep Directory

Access a real-time directory of all life science experts in your area from the Reps tab in the left navigation bar. This directory includes highly-trained medical science liaisons, nurse educators, reimbursement specialists, product experts, and other life science experts.

- **Search:** Search the directory by rep name, product, or company in the search bar at the top of the Reps page.
- **Filter:** Refine your results using the filters on the left-hand menu.
- **Profiles:** Rep profiles include contact information, products/services, appointment history, booking rules, and a link to send a direct message.
- **Rep Status:** *Approve*, *Favorite*, or *Block\** a rep within their profile or directory listing by clicking the corresponding icon.
- **Invite a Rep:** On the Reps tab, click the **+Invite Rep** button in the bottom right corner. A new panel with an editable message will appear. Add the rep's email and click **Send**.

**Block**

### \*About Blocked:

Life science experts that you block on RxVantage will not be able to book appointments with your practice. They will still see your practice on RxVantage, but no appointments will show as available to them.



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# Patient Assistance

## Search and Find Patient Assistant Program Information

Find information for all patient assistant programs, coupons, and co-pay cards for any company or product. Simply click Patient Assistance in the left navigation bar, then use the search field at the top of the page.


Download forms, fill out information, or send to your patients. RxVantage is completely secure and does not integrate with any platforms or store any patient information.

The screenshot shows the RxAssist Savings Center interface. At the top, there's a search bar with 'Tresiba' and a ZIP code '37215'. Below the search bar, it says 'Patient Assistance Programs: Tresiba (insulin degludec injection)'. The main content area lists eligibility criteria under 'NOVO NORDISK Patient Assistance Program'. It includes sections for 'INCOME' (Single: Not Avail., % FPL: 400; Couple: Not Avail., % FPL: 400) and 'ELIGIBILITY' (Patient must not have insurance, or is enrolled in Medicare; Patient cannot be enrolled in or qualify for any other federal, state, or government program such as Medicaid, Low Income Subsidy, or Veterans (VA) Benefits (with the exception of Medicare Part D); COVID-19: Patients who have lost their health insurance due to COVID-19 and are in need of assistance may be eligible for a free 90-day supply of Tresiba, Levemir, Novolog, Novolog Mix 70/30, Fiasp, or Novolin. See application or call program for details). There's a 'SHARED TO APPLICATION' section with a 'Provider' dropdown and an 'English' button. At the bottom, there's a 'Tresiba Coupons' section with a 'Print, email or text coupons and see a local price map for brand and generic drugs.' It includes a 'Formulation' dropdown, a 'Strength' dropdown (set to '5'), a 'Strength Type' dropdown, and a 'Create a coupon' button. There's also a 'Quantity' field set to '30' and radio buttons for 'Brand' and 'Generic'.

## Staff

### Add and Manage Your Staff

View and manage account permissions across your office, allowing staff and physicians to access RxVantage directly.

- **Add Staff:** To invite staff to join RxVantage, simply click the **+ADD STAFF** button. Select the staff role (provider, nurse, or support staff), type in their information, set access permissions (admin or read-only), and click **Add Member**.
- **Edit Permissions:** As an administrator, you can set permissions for your staff. If you need to edit permissions or information, click on the staff member's name from within the directory, click the pencil icon  in the top right corner of their profile, make the necessary edits and save.



#### Quick Tip

**Read-Only Accounts:** Invite your entire team to RxVantage. With a read-only account, providers can view upcoming appointments, message reps, search patient assistant programs, receive automatic appointment reminders, and get the answers they need.

## Notifications and Profile

### Account Basics

The bell icon on your account page houses all notifications regarding account updates, appointments, rep requests, and messages. Choose the notifications you'd like to receive by clicking your profile icon, then selecting **Notification Settings** from the drop-down.

Update your title, password, email, or profile photo by clicking your profile icon, then selecting **Edit Profile** from the drop-down.

The screenshot shows a dropdown menu for the account profile. At the top, there's a bell icon with a '2' notification badge and a profile icon with the letter 'S'. The dropdown menu contains the following options: 'New RxVantage', 'Take a tour', 'Edit Profile', 'Notification Settings', and 'Logout'.



  
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# Settings

## Control And Customize Your RxVantage Account

Navigate between these pages in your Settings tab to customize your account to fit your needs.

### Office Info

Add and edit your office information at any time. All information stored here will be shared with reps prior to a confirmed appointment so they can come prepared. Information includes:

- [Office Details](#)
- [Headcount for Meals](#)
- [General Preferences](#)
- [General Rules and Facility Conduct](#)

### Holidays

Select the holidays that your office is closed. These closures are automatically captured on your office calendar and visible to reps.

### Office Hours

Let reps know when your office is open to them by setting your office hours. You can (and should!) define the days and times when your providers are in your office. Edit at any time.

### Visitation Rules

Control your customized visitation rules to ensure your practice is meeting with the right life science expert at the right time.

- **Require Pre-Approval:** Toggle requirement on and off by clicking within the pre-approval box at the top of the page. If approval is required, reps must request approval which you can accept or deny. You may also pre-approve reps. You will receive a notification when a rep requests approval.
- **Add Customized Rules:** Add a new rule by clicking the **+Add** rep rule button. Follow the prompts to input the information. Add as many rules as necessary, and remember you can set unique rules for specific reps from within their profile in the Reps tab.
- **Edit Rules:** Edit any rule at any time by clicking the pencil icon next to the rule. Delete a rule by clicking the trashcan icon next to the rule, then the trashcan icon.

### Rep Assignment Tool

- Easily assign (or reassign) reps to upcoming appointments from this list view. Simply click into the appointment, click **Assign**, type in the name of the rep you wish to meet with, and save. The rep will receive an email and notification requesting to confirm.

### Recurring Appointments

- View and edit all recurring appointments from this page. To add a new appointment, simply click the **+Add** recurring appointment button and set the appointment details and frequency. To edit, click the pencil icon next to the appointment, make the necessary adjustments, and save.



# Practice Managers Love RxVantage

“

A game changer for us. We now have higher quality meetings with reps about new drugs and information our providers and staff crave, and our patients need.



**Connie Renfro**  
North Mississippi Health System

“

It's important to have that time with the drug reps. We're trying to cure cancer. It's about finding the right drug to effectively cure patients. It all goes back to the patients.



**Niki Roosma**  
Oncology Consultants

## Help Spread The Word About RxVantage

Share your feedback or refer another practice or colleague to us: [feedback@rxvantage.com](mailto:feedback@rxvantage.com)