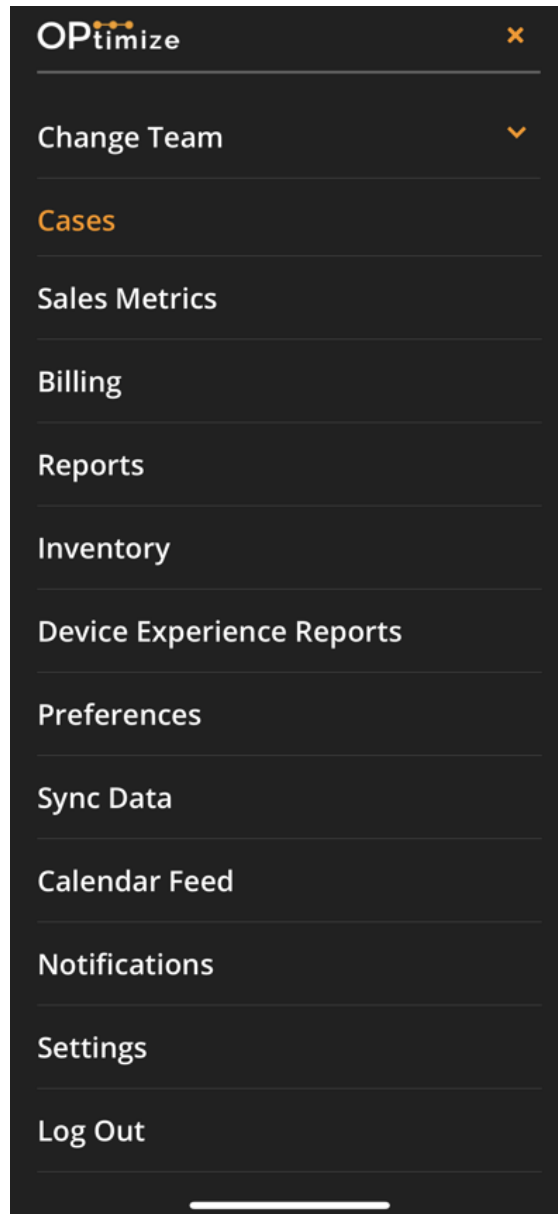


This guide will cover all features of the OPTimize scheduling app used to schedule and manage surgeries by sales consultants. A video training brief can be found at: [https://youtu.be/9x4\\_TuP2oDs](https://youtu.be/9x4_TuP2oDs) and timestamps are included in [Appendix B](#).



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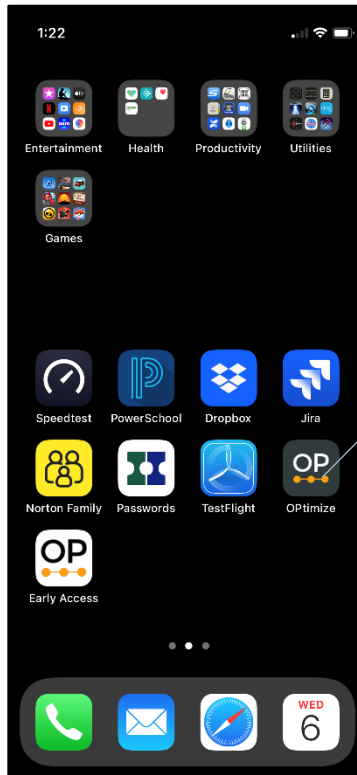
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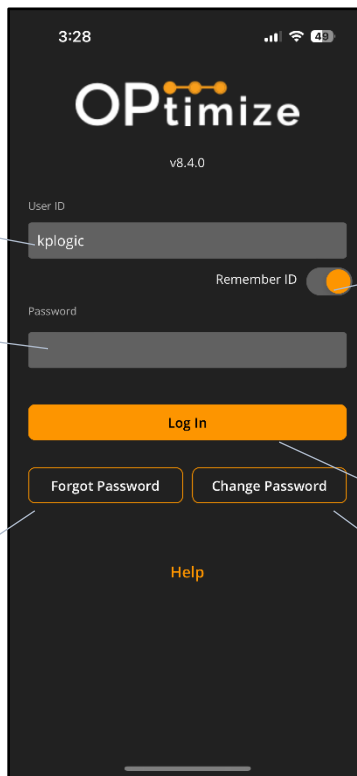
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## Logging In



Tap to open the scheduling app on your mobile device.



ID

Password

Select if password forgotten.

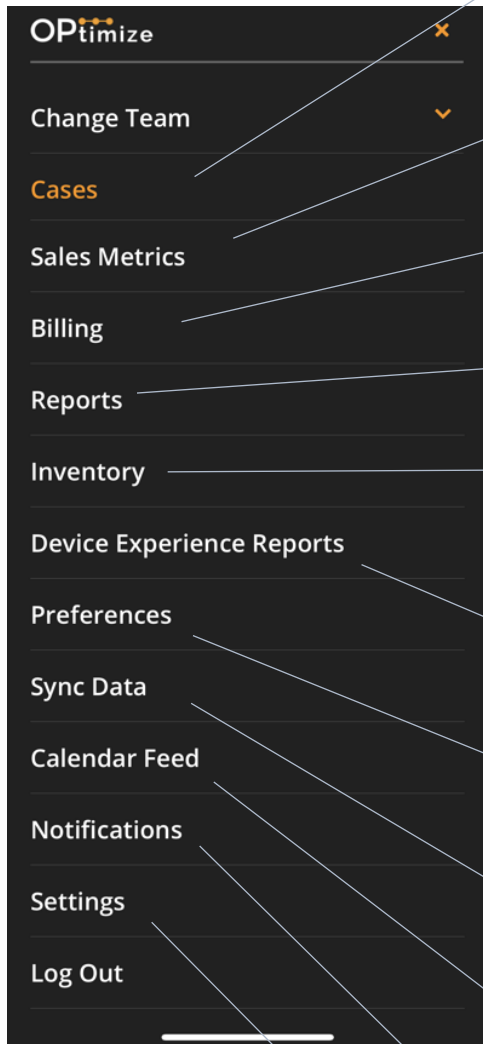
Remember ID activated.

Note: Passwords cannot be saved, but you can stay logged in for 7 days. Passwords must be changed every 180 days.

Tap to log in.

Select to change

Main Menu



[Cases](#)

- Schedule, submit, and review cases.
- Select implant and instrument sets for cases.

[Sales Metrics](#)

- View sales and case metrics by month, type, team, surgeon, or hospital.

[Billing](#)

- View cases missing DGRs or POs or not billed.

[Reports](#)

- View PDF reports.

[Inventory](#)

- View Office Set status and contents plus ExpressCare Set contents. View Backorder and Tracking information. View and scan consignment inventory.

[Device Experience Report](#)

- Add non-case DER or search previously submitted DERs.

[Preferences](#)

- Add, edit, and copy team Preferences.

[Sync Data](#)

- Synchronize case schedule and sets.

[Calendar Feed](#)

- Export the case schedule to an external calendar (see Appendix A for additional details).

[Notifications](#)

- Shows read and unread notifications.

[Settings](#)

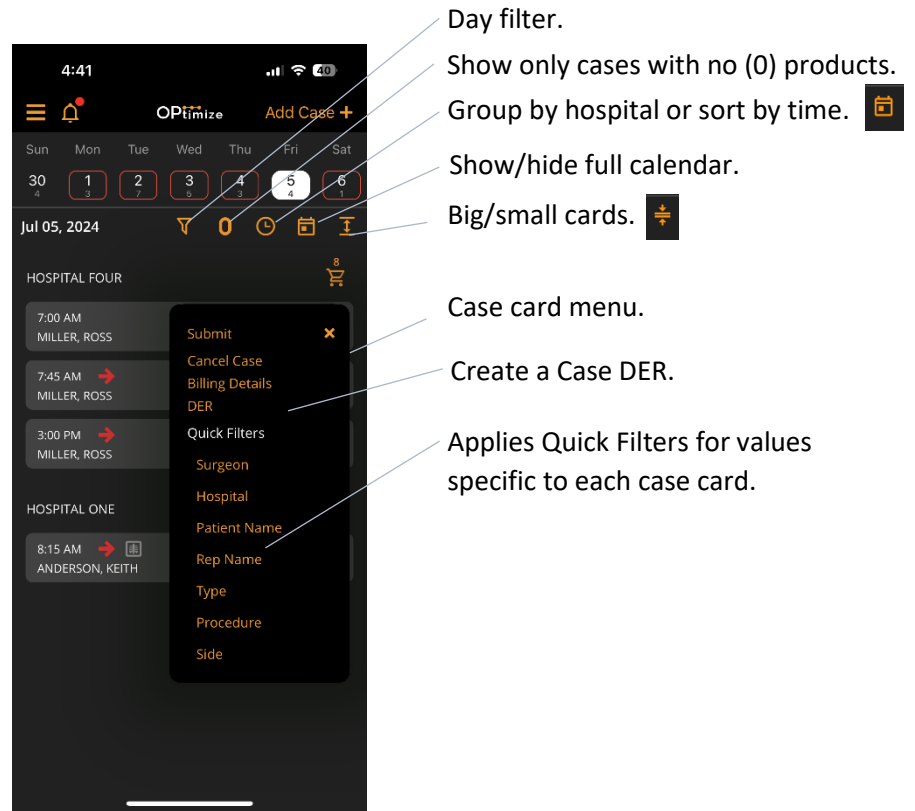
- View and change app settings.

Cases (Calendar)

Main Menu.   
 Today. Subscript "6" = 6 cases scheduled for the day.   
 Selected date.   
 Price Sheet available. Tap for Billing Details.   
 Tap for Case Details.   
 Add new case.   
 Search for any case scheduled with Optimize.   
 Red outline = At least one case is not submitted to the office.   
 Filters and options.   
 Case menu.   
 Swipe left/right for additional actions.

Price Sheet available. Tap for Billing Details.   
 Red Arrow = Case not submitted to the office. Tap arrow to submit.   
 Surgeon.   
 Patient.   
 Cover Rep.   
 Case Type (Hip/Knee/Shoulder)   
 Procedure Type (Primary/Revision)   
 Side (Bilateral/Left/Right)   
 Shipment Tracking information is available for this account.   
 Total sets at hospital. Tap to go to the Aggregate screen.   
 Case Number. PENDING will show until imported by the office.   
 Zero office sets requested for the case.   
 Zero products used in the case.

- All case times are entered and displayed using the Rep's home time zone (regardless of the Rep's current location).
  - Example: If a California Rep is traveling in New York and needs to schedule a 7 AM Pacific Standard Time case, she should enter 7 AM as the case time. Regardless of where the Rep travels, the case will always show as 7 AM.



- Color scheme:

➤ **Red:**

- New Case: when a new case is added to the calendar, the case is placed in a **Red** status until the case is submitted to the office (see page 8).
- Change to Existing Case: when the user makes a change to an existing case that has already been submitted to the office, the status will turn back to **Red** until the user re-submits the case to the office.
- **Red** cases will sync across all of a user's devices. Additionally, any unsubmitted changes to a case will also sync to the original creator of the case. Users who are neither the creator nor the user submitting the change, will not see the case until the changes are submitted.



## Aggregate Screen

The Aggregate screen shows all sets sent to the account for surgeries on selected case date.

Select case type.

Sets are shown for the selected case type.

Select hospital.

L1: 1 of 3 Primary Knee cases is a left side.

- L: Left
- R: Right
- B: Bilateral

TYPE	CASES	PRIMARY	REVISION
HIP	1	1	
<b>KNEE</b>	3	3 (L1)	
All	4	4	

**Implants**

ATTUNE FEMURS CR RIGHT	1
ATTUNE FEMURS MICRO RIGHT	1
ATTUNE INSERTS FB CR	3
ATTUNE INSERTS FB CR THICK	2
ATTUNE PATELLAS	2
ATTUNE TRAYS FB 5+	3
ATTUNE FEMURS CR LEFT	2
ATTUNE FEMURS MICRO LEFT	1
ATTUNE IMPLANTS MICRO FB	1
ATTUNE REVISION TRAYS FB	1
17	

**Instruments**

ATTUNE INSTRUMENTS	1
ATTUNE INSTRUMENTS CR	1
ATTUNE INSTRUMENTS MICRO	1
3	

## Search Cases

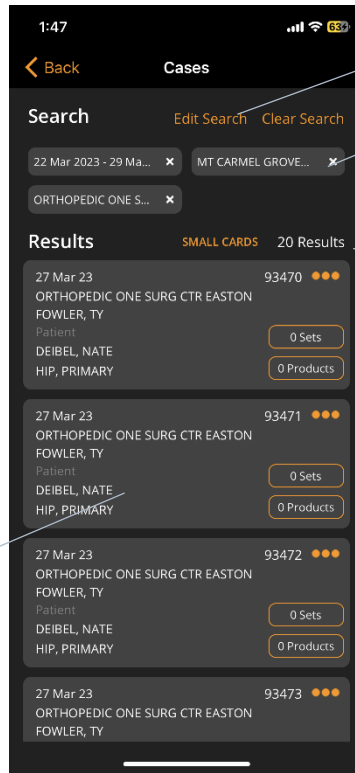
Apply the filter (i.e. execute the search).

Reset all fields.

Select one or more of the fields to enter filter criteria.

Patient, Rep Notes, and Office Notes are wildcard searches (i.e. search for any string of characters in the field).

- If the search returns more than 500 cases, the user will be prompted to narrow the search by selecting additional filter criteria.



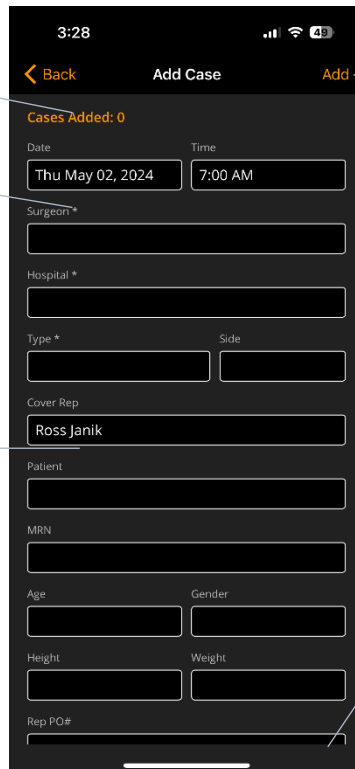
Modify filter criteria.

Remove the individual filter criteria.

Number of cases returned by the filter.

Tap a case to view *Case Details*.

Add New Case



Total # of cases added.

(\*) Required fields  
 - Surgeon  
 - Hospital  
 - Procedure

Cover Rep (defaults to user logged in but can be changed).

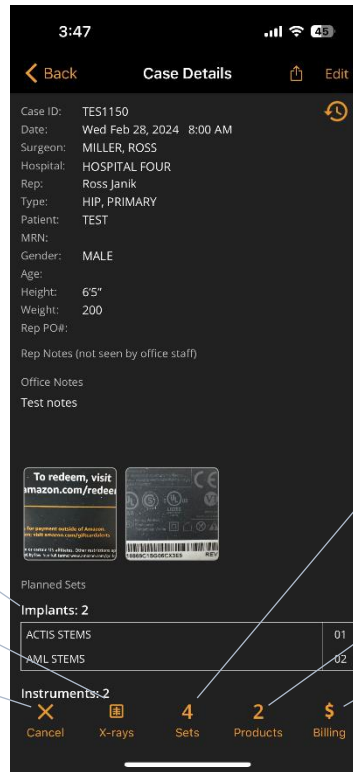
Add new case to schedule (after required selections are made).

Scroll down for additional fields not shown in screenshot:

- Rep Notes (optional). The warehouse staff will **NOT** see any notes that are entered.
- Office Notes (optional). The warehouse staff will see any notes that are entered.

**Note:** Multiple cases can be added before returning to the calendar screen.

Case Details



Change case information. Cases cannot be edited after products are submitted.

View Case History.

Office sets planned for case (which set the office is sending to cover requests

Add/view X-rays.

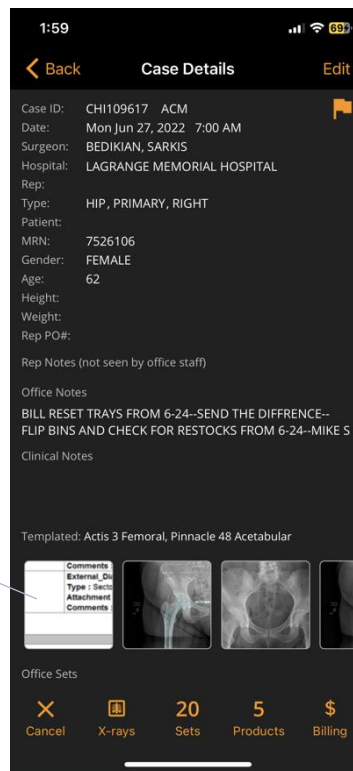
Cancel the case (office is automatically notified). Cases cannot be canceled after the sticker sheet is submitted.

View, add, or delete requested office sets for case. **Note: must be online to access sets.**

Add/view products used.

User must have Sales Access permission to view Billing Details. Contact your office if this permission is needed.

When a case is in **Red** status (new case added, existing case changed), the user must select the **Submit** button in order to submit the information for the case to the warehouse.



ACM flag.

X-ray thumbnails. Tap to view x-rays.

## Billing Details

Total POs and amount.

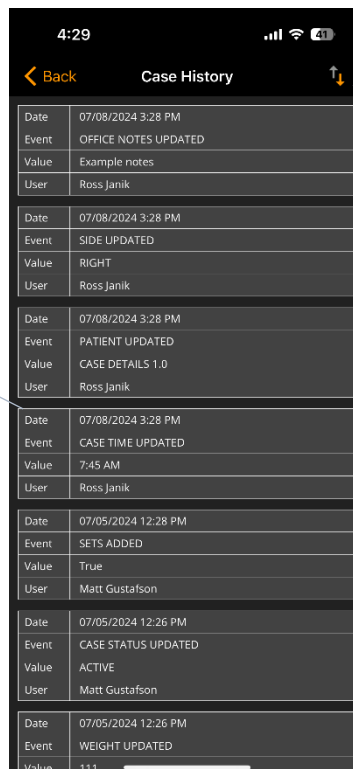
Individual PO details.



View price sheet if available.

## Case History

All changes made to a case are tracked and timestamped.



Change sort order (oldest to newest or newest to oldest).

## Sets

Request ExpressCare sets for case. Request is added to the Notes.

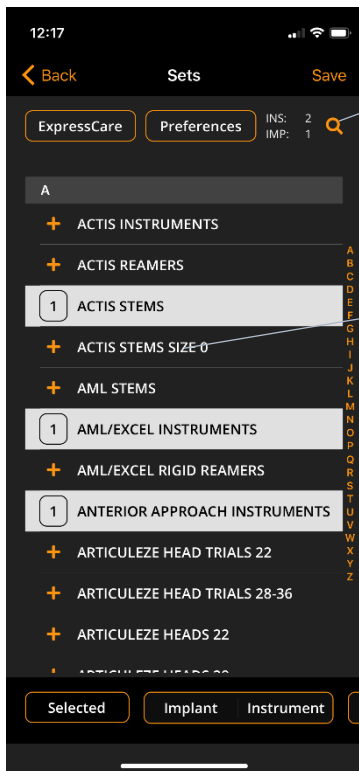
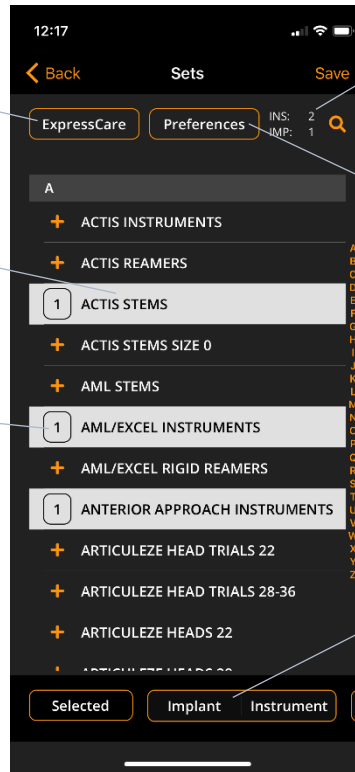
Tap set name to request set. Requested sets are highlighted in WHITE.

Change requested quantity.

Total number of Office Instrument (Ins) and Implant (Imp) sets requested.

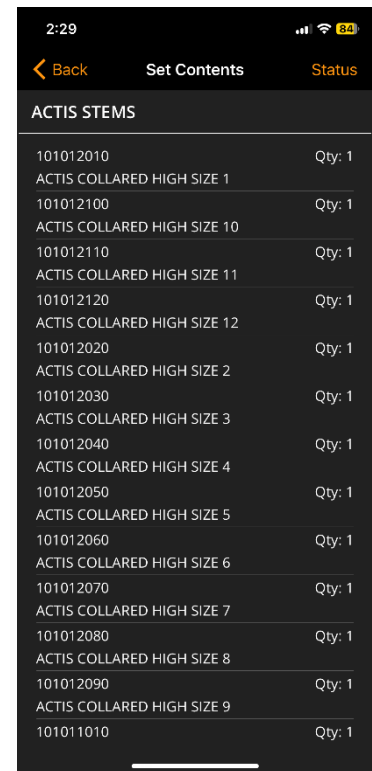
Add sets using a Preference.

Tap to activate or deactivate filters. Scroll right to see additional filters.



Search for any string of characters in a set name or product number. At least 3 characters must be entered for the search to execute.

Select and hold the set name for 3 seconds to view *Set Contents* or *Set Status*.



**Note:** Multiple Preferences can be added to a case. When a Preference is selected, the user chooses whether to append or replace the sets and notes (both office and rep notes). Appending keeps the current sets and notes and adds the Preference data. Replacing deletes all current sets and notes and adds the Preference data.

**Note:** Multiple filters can be selected simultaneously (e.g. **Implant + Revision, Instrument + SELECTED SETS**).

**Note:** Sets cannot be removed from a case on or after the case date.

Sales Metrics

Filter by selected DePuy month.

Filter based on procedure type: hip, knee, etc.

Sales Metrics spreadsheet.

Swaps current view from Sales to Cases.

Sort by surgeon.

Sort by hospital.

Sort by team.

Sales Metrics

13:54

Sales Metrics

Invoiced through: Monday, 11/04/24

Month Goal: +8%

TEAM OPTIMIZE

TOTAL YTD: 20%

YTD	Sales	Chg %
2023 Full Year	\$5,281,956	
2023 YTD	\$4,391,074	
2024 YTD	\$5,289,901	20%

MTD

YTD	Sales	Chg %
2023 Nov	\$369,438	
2023 Nov MTD	\$113,581	
2024 Nov MTD	\$154,954	36%

Not Billed

Not Billed	Sales
Not Billed	\$55,864

HIP YTD: 4%

YTD	Sales	Chg %
2023 Full Year	\$2,509,351	
2023 YTD	\$2,033,359	
2024 YTD	\$2,104,800	4%

MTD

YTD	Sales	Chg %
2023 Nov	\$143,731	
2023 Nov MTD	\$33,104	
2024 Nov MTD	\$42,865	29%

Not Billed

Sales

Case Metrics

14:25

Sales Metrics

Invoiced through: Monday, 11/04/24

Month Goal: +8%

TEAM OPTIMIZE

TOTAL YTD: 11%

YTD	Cases	Chg %
2023 Full Year	1171	
2023 YTD	976	
2024 YTD	1086	11%

MTD

YTD	Cases	Chg %
2023 Nov	76	
2023 Nov MTD	22	
2024 Nov MTD	30	36%

HIP YTD: 2%

YTD	Cases	Chg %
2023 Full Year	649	
2023 YTD	531	
2024 YTD	544	2%

MTD

YTD	Cases	Chg %
2023 Nov	35	
2023 Nov MTD	7	
2024 Nov MTD	11	57%

KNEE YTD: 40%

YTD	Cases	Chg %
2023 Full Year	357	

Growth goal

Year-To-Date  

$$\left( \frac{\text{CurrentYTD}}{\text{PreviousYTD}} - 1 \right) \times 100$$

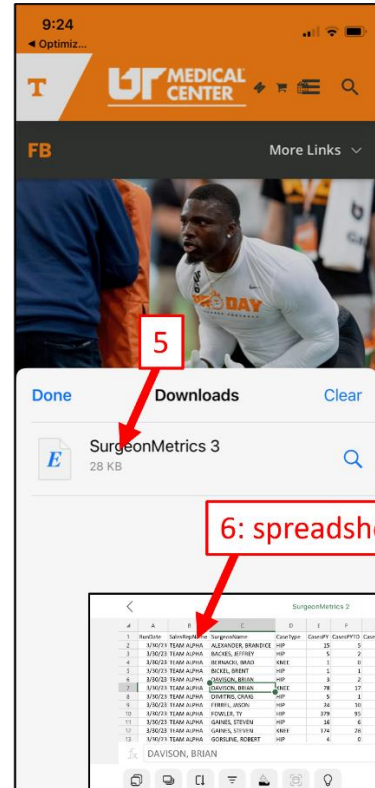
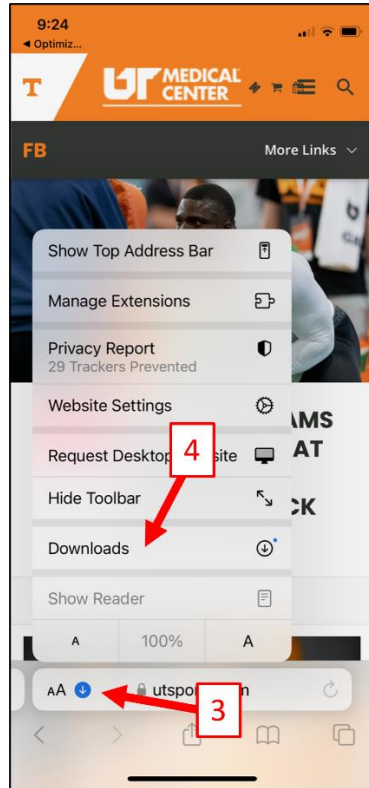
Month-To-Date  

$$\left( \frac{\text{CurrentMTD}}{\text{PreviousMTD}} - 1 \right) \times 100$$

Not Billed  
 Total price of all cases not billed.

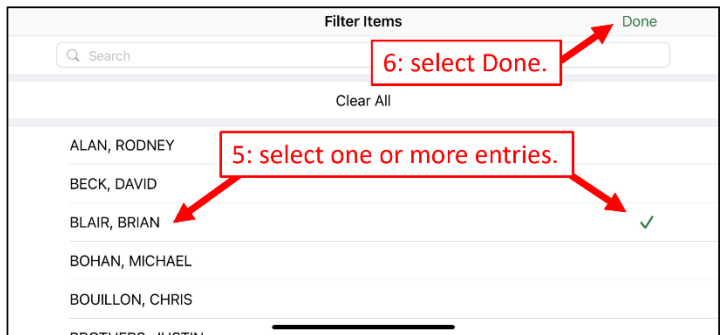
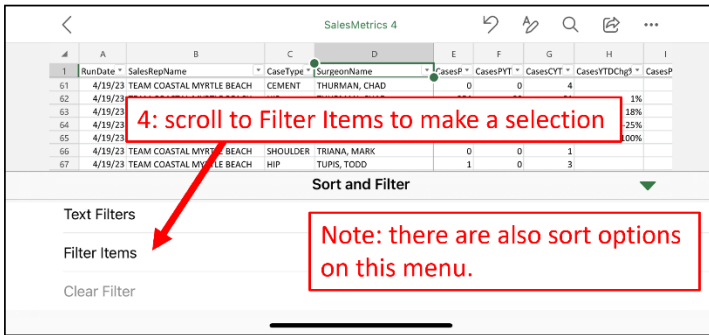
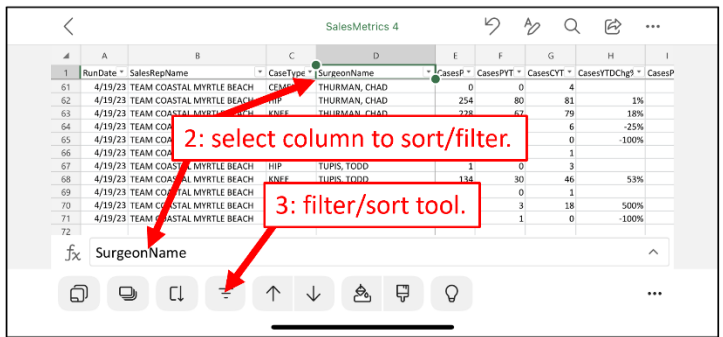
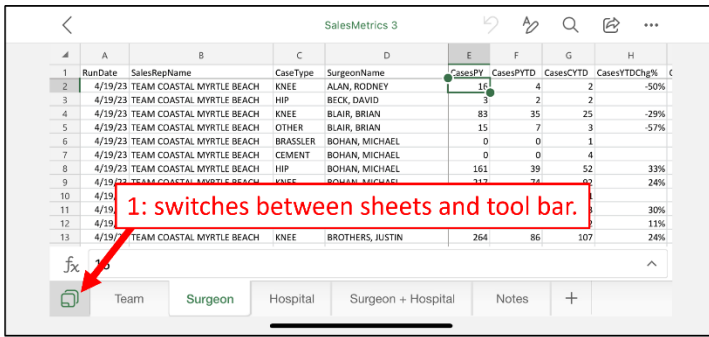


Opening Sales Metrics spreadsheet on an iOS device with Excel app installed

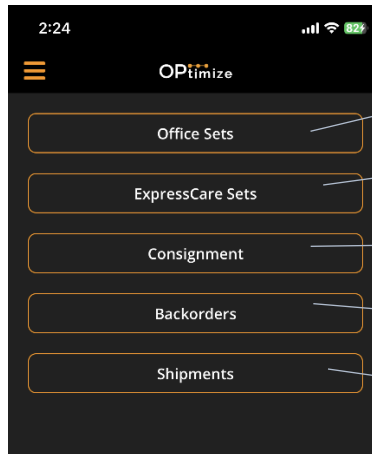


	A	B	C	D	E	F	G	H	I	J	K
1	Year/Date	Team/Player	Team/Player	Count	Count	Count	Count	Count	Count	Count	Count
2	3/30/23	TEAM ALPHA	ALEXANDER BRANDEE	HP	35	5	2	60%	3	3	
3	3/30/23	TEAM ALPHA	WHEELER, BRITNEY	HP	5	2	0	-100%	0	0	
4	3/30/23	TEAM ALPHA	WHEELER, BRITNEY	HP	1	0	0	0	0	0	
5	3/30/23	TEAM ALPHA	WHEELER, BRITNEY	HP	3	1	0	-100%	0	0	
6	3/30/23	TEAM ALPHA	WHEELER, BRITNEY	HP	3	2	1	-50%	0	0	
7	3/30/23	TEAM ALPHA	WHEELER, BRITNEY	HP	78	17	11	-15%	7	7	
8	3/30/23	TEAM ALPHA	WHEELER, BRITNEY	HP	5	2	2	200%	0	0	
9	3/30/23	TEAM ALPHA	WHEELER, BRITNEY	HP	25	16	1	-36%	1	1	
10	3/30/23	TEAM ALPHA	WHEELER, BRITNEY	HP	379	95	73	-25%	38	38	
11	3/30/23	TEAM ALPHA	WHEELER, BRITNEY	HP	34	6	3	-82%	1	1	
12	3/30/23	TEAM ALPHA	WHEELER, BRITNEY	HP	174	29	95	-83%	14	11	
13	3/30/23	TEAM ALPHA	WHEELER, BRITNEY	HP	6	0	1		0	0	
14	DAVISON, BRIAN										

## Sorting and Filtering with Excel on an iOS device



## Inventory



View Office Sets.

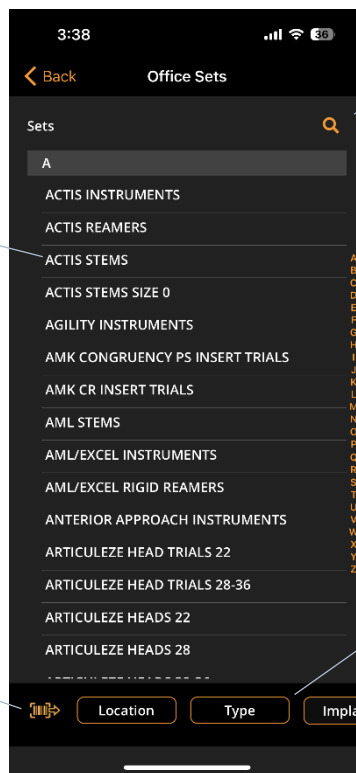
View ExpressCare Sets.

View and scan Consignment Inventory.

View Backorder report.

View Shipment Tracking information. NOTE: This must be loaded by the office.

## Office and ExpressCare Sets

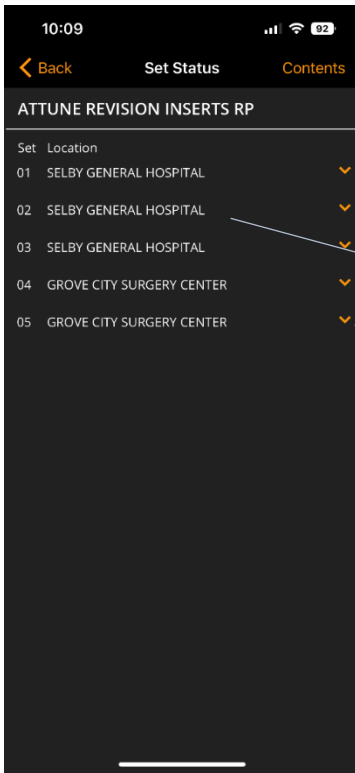


Tap the set name to view *Set Contents* (Office and ExpressCare sets) or *Set Status* (Office sets only).

Search for any string of characters in a set name or product number. At least 3 characters must be entered for search to execute.

Tap to activate or deactivate filters. Scroll right to see additional filters.

Tap to open the *Move Sets* screen (if available).



Tap to view set products.

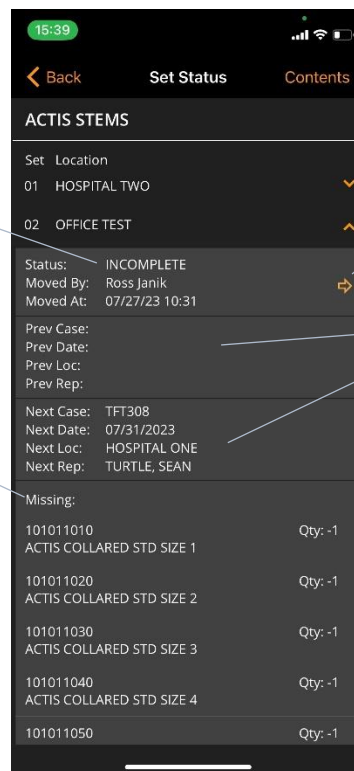


Current set location.

Tap to expand additional status details (see below).

Set Status: *Complete* or *Incomplete*.

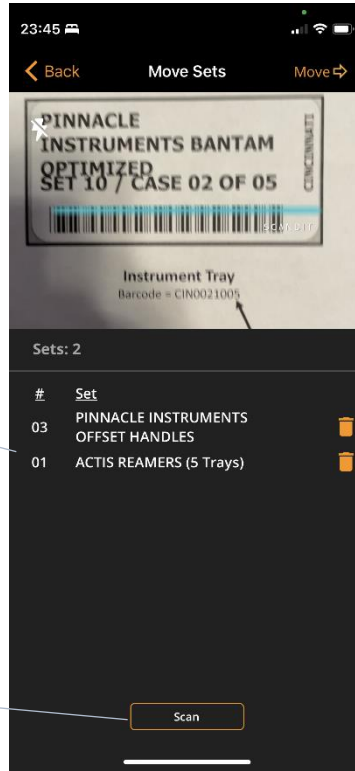
If the set is in *Incomplete* status, missing products will be shown if logged by the office.



Tap to move selected set to a different location (if available).

Previous or Next case data will show if planned by the office.

## Move Set Locations

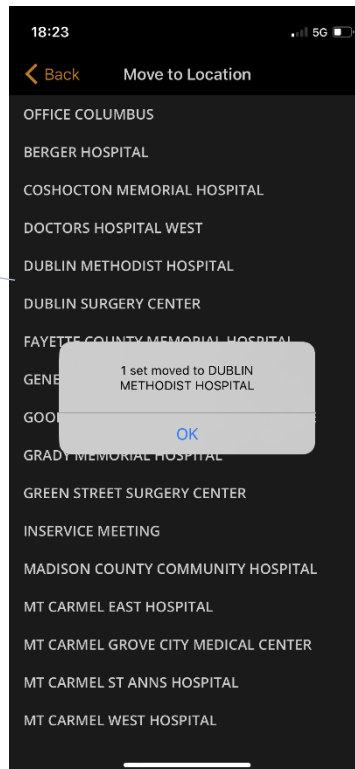


Tap to choose new location for all scanned office sets.

List of sets that have already been scanned.

Delete scanned set.

Tap to scan set barcode.



Tap new location to move office set location.

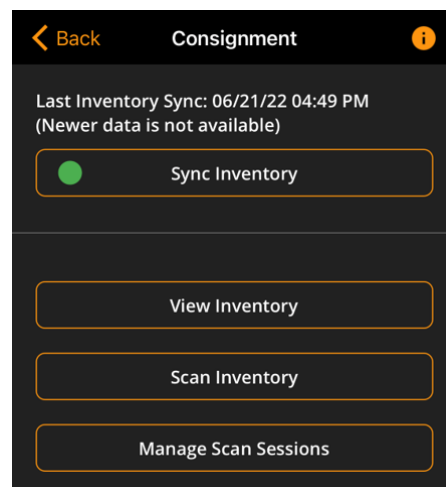
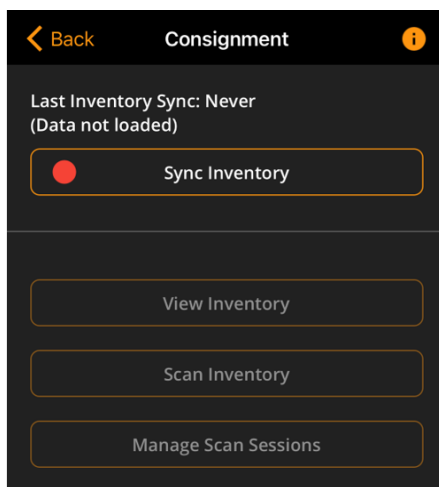
## Consignment Inventory

The OPTimize scheduling app can be used to view and search consignment inventory. This feature also allows users to scan consignment inventory to find variances or submit to the office as a cycle count scan file.

## Sync Inventory

A consignment inventory file is typically updated by the office once per day. To view any consignments, an inventory file must be imported. To sync inventory from the office, choose the **Sync Inventory** button.

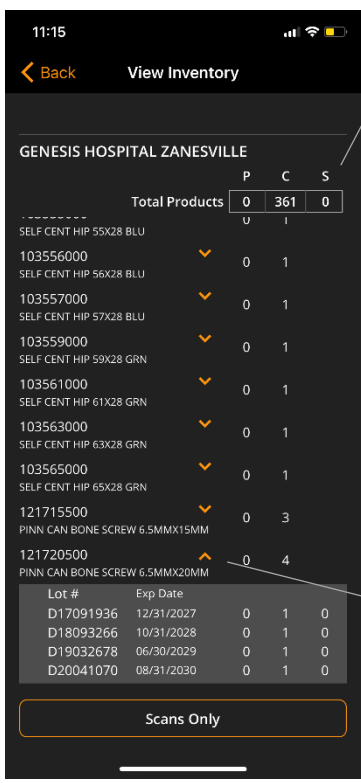
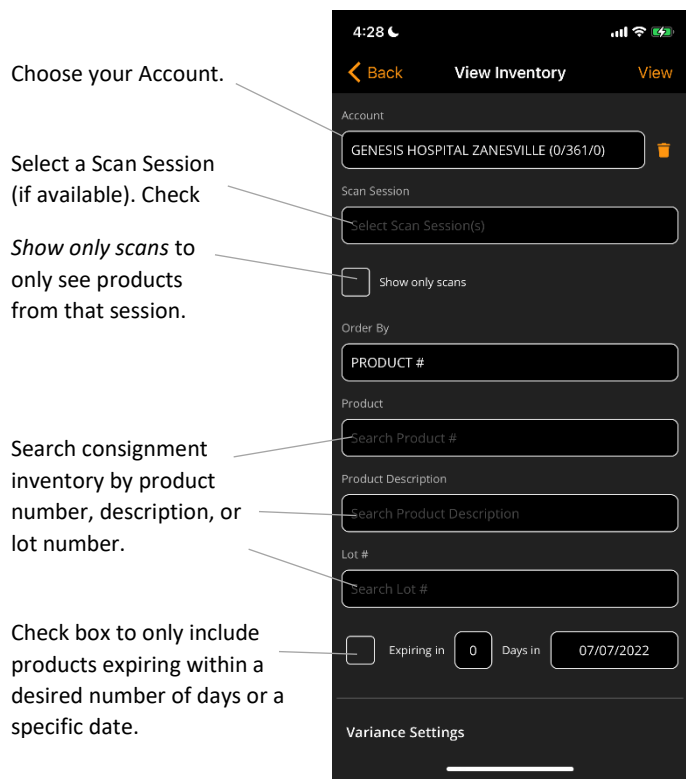
- This will display a red dot if data is not up to date and a green dot if the newest data is already synced.



## View Inventory

Selecting *View Inventory* will open a new screen where the user can view or search inventory consigned to any accounts that have been assigned to their team.

If a scan session has been completed, this screen can also be used to find variances between the physical scans and the consignment inventory file updated by the office. Additional information on searching for variances can be found in the [Using Scan Sessions to Cycle Count](#) section of this guide.



Par/Consignment/Scans.

**PAR** = Par level for an account's consignment. These are set by the office.

**CONSIGN** = Current number of implants consigned based off the inventory sync on page 2.

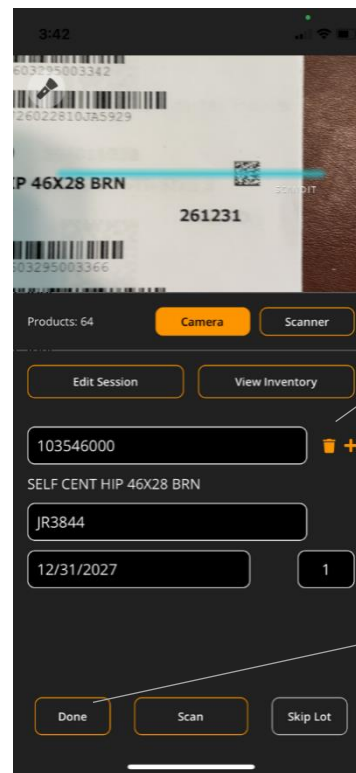
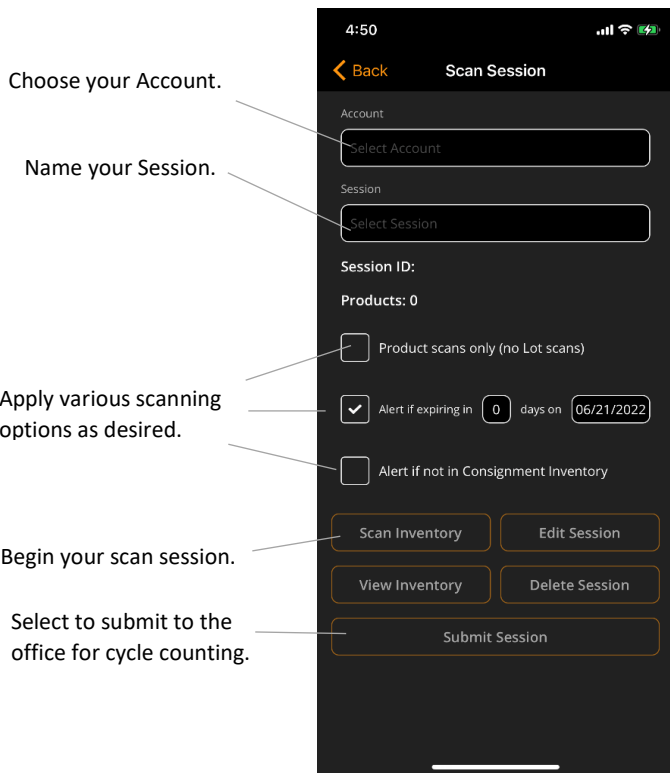
**SCANS** = Number of products on scan sessions for that account.

Tap the orange arrow to expand and show lot numbers and expiration dates.

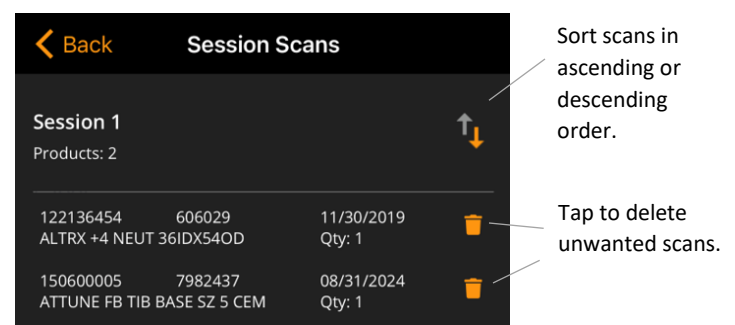
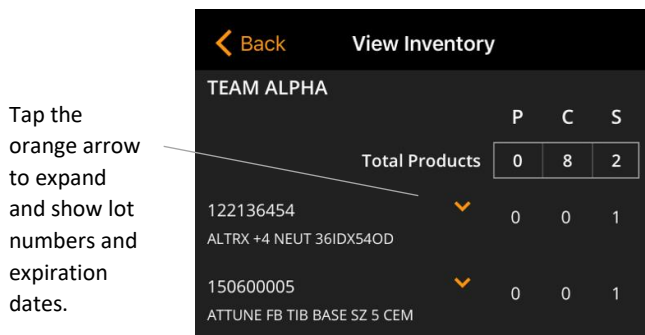
## Scan Inventory

Selecting *Scan Inventory* will open a new screen where the user can scan inventory consigned to any accounts that have been assigned to their team. Once a scan session is complete, those can be submitted to the office as a cycle count file which can be compared with current inventory to find any variances.

Scans can be performed via the camera on the user's mobile device or a Bluetooth scanner. For information on obtaining a Bluetooth scanner, see the [Recommended Scanners](#) section of this guide.



The *View Inventory* button can be used to view all items that have been scanned during the selected session, while *Edit Session* can be used to delete any unwanted scans (e.g. duplicates, erroneous scans, etc.).





## Managing Scan Sessions

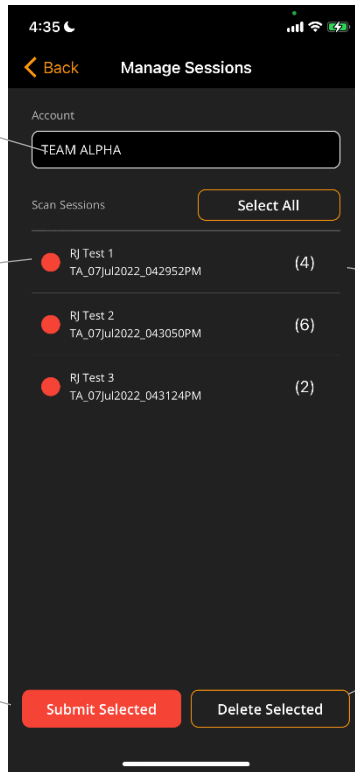
Saved sessions can be accessed through the Manage Scan Sessions screen. Once an account is selected, only scans from that account will be visible.

Choose your Account.

A red dot indicates the sessions has not been submitted to the office.

Once submitted the dot will turn green.

Sessions can be submitted individually or multiple can be submitted at one time.



Total number of scans.

Sessions can be deleted individually but will automatically delete after 7 days of inactivity to reduce clutter.

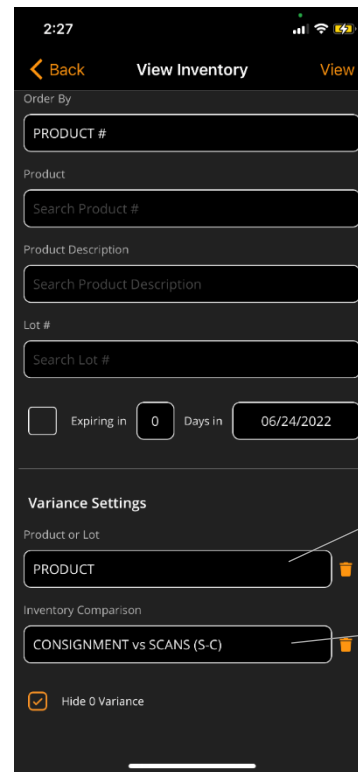
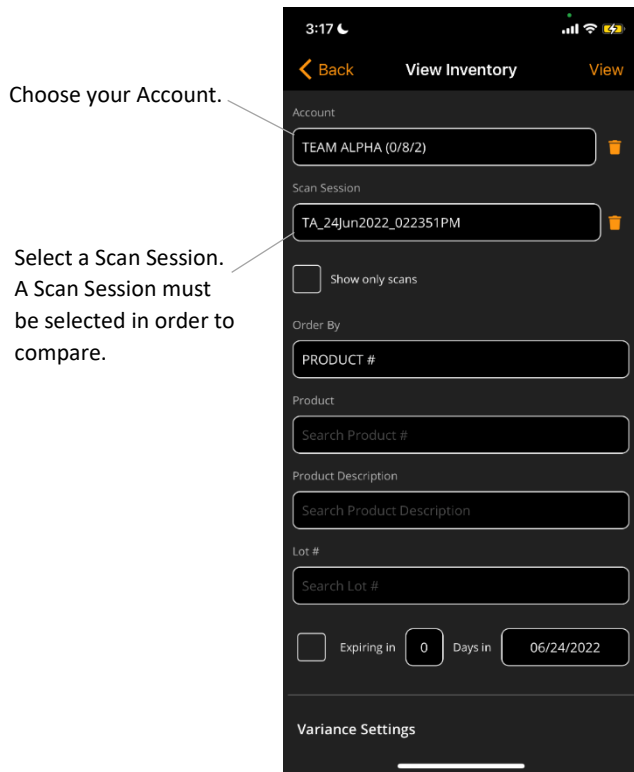
## Using Scan Sessions to Cycle Count

As mentioned in the previous section, scan sessions can be submitted to the office to identify any variances in the OPTimize Warehouse system, however, sessions can also be compared with the current inventory file directly in the scheduling app.

NOTE: If scan sessions are submitted to the office, please notify your operations team so they can perform a cycle count.

Using the View Inventory function, select the account and scan session that was completed, then scroll to the bottom of the screen to choose the desired Variance Settings.

NOTE: A scan session must be selected in order to compare.



## Recommended Scanners

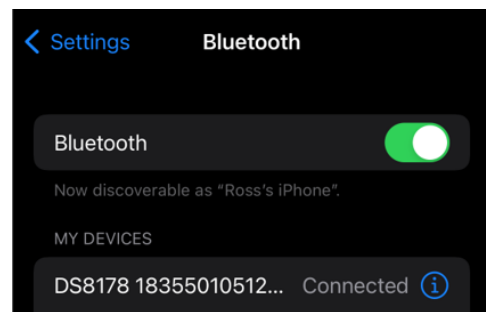
While a user's phone camera can be used, there are some Bluetooth scanners that are recommended if desired. Those options are provided below.

1. Zebra DS2278 is recommended, but most Zebra wireless scanner models used in the Warehouse can be made discoverable on Bluetooth by scanning the barcode below. Open your device's Bluetooth menu to connect to the scanner. Some models may initially read as "Keyboard" but will update to once connected.

NOTE: Because the scanner functions as a keyboard, the on-screen keyboard may not be visible. To activate the on-screen keyboard either 1) double-click the trigger/button on your scanner or 2) double-tap the text box of the field in which you need to type. If issues persist, disconnect your device from the scanner and reconnect after typing.



**HID Bluetooth Classic**



Once scanning is complete, re-pair the scanner to the cradle by scanning the barcode below, followed by the barcode on the cradle.



**\*Cradle Bluetooth Classic**

NOTE: If the scanner does not reconnect to the cradle, restore to defaults using the barcode below, then scan the second barcode to add an Enter key after each scan.



**Restore Defaults**



**Add Enter Key (Carriage Return/Line Feed)**

2. NADAMOO 2D Wireless Barcode Scanner (~\$70 on Amazon)
3. SocketScan S740 Universal Barcode Scanner (~\$330 on Amazon)

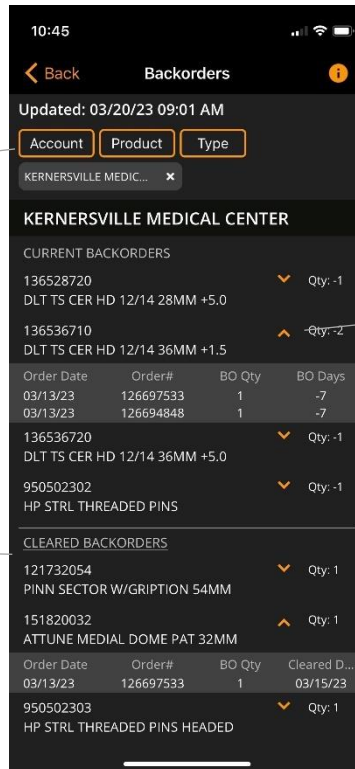
## Backorders

Consignment backorder information is available in OPTimize, but must be updated by the office staff each day.

NOTE: Due to the movement of inventory in the field, backorder location data is approximate. You should always physically verify consignment inventory prior to any surgery.

Tap to apply filters for backorders.

Cleared backorders show for 7 days.

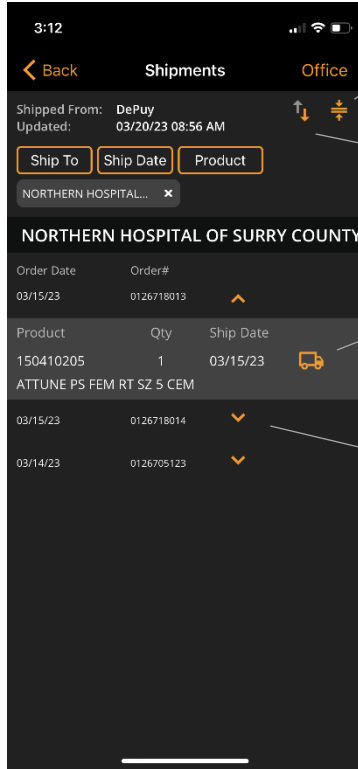


Tap to expand for additional details.

NOTE: Most cleared backorders have shipped, however, some may have been canceled. Contact your office with any questions.

## Shipment Information

Shipment tracking information is available in OPTimize only if it has been updated by the office staff. If available, this information can also be accessed by selecting the truck icon on the Cases (calendar) screen.

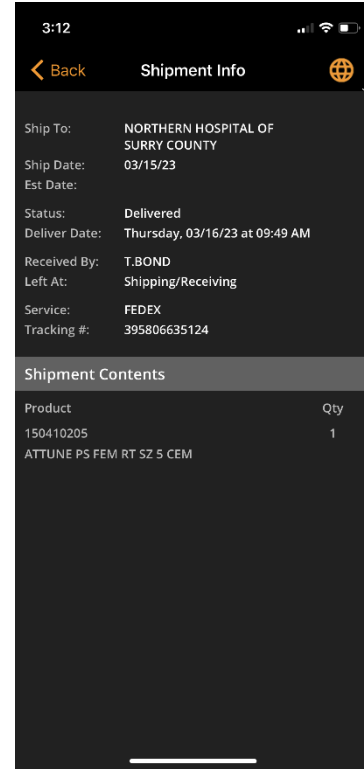


Expand/collapse all.

Change Order Date sort order.

Tap to view Shipment Info.

Tap to expand/collapse product details.



Tap to open FedEx/UPS site with full tracking details.

## Device Experience Reports (DERs)

Device Experience Reports (DERs) can be created and submitted to corporate through the OPTimize app. DERs can be connected to a specific case or added in a general non-case format.

NOTE: This feature must be enabled by your territory before it is available in the OPTimize app.

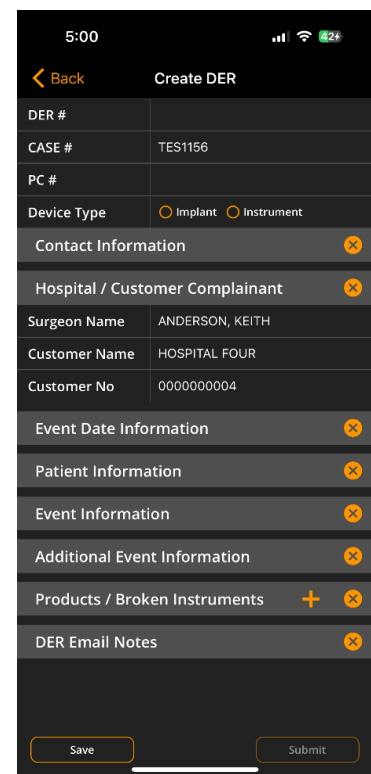
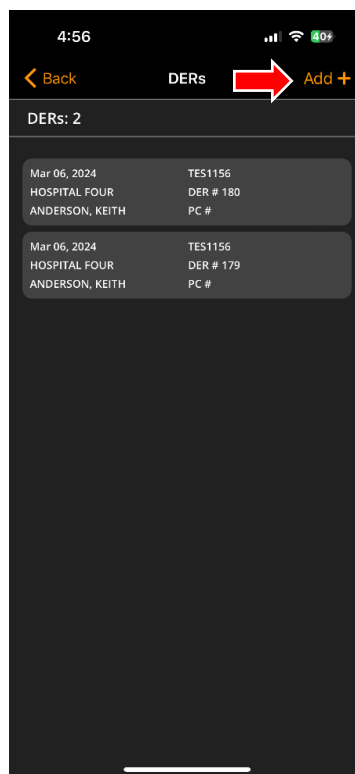
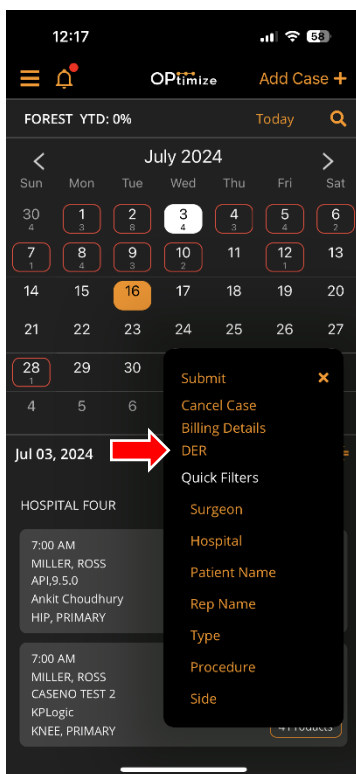
### Case DERs

Case DERs link the complaint to a specific OPTimize case number. To add a Case DER, choose the 3 dots in the upper right of the case card, then choose **DER**. The following screen will allow you to view DERs already linked to that case number, or add a new DER.

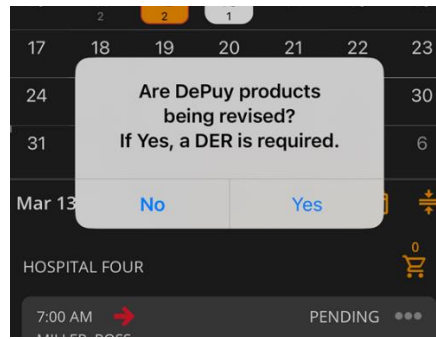
Case DERs automatically populate some of the required fields such as surgeon, customer, and patient. When all other required fields are entered, choose **Save** to save your progress.

NOTE: You are not able to submit the DER until it has been saved.

Once complete, choose **Submit** to send the DER to the J&J Product Complaint inbox. This will also copy your J&J email address and a contact set up by your local office.



When entering the Products screen on any REVISION case for the first time, you will receive this prompt per J&J policy. This assists the office in tracking for compliance purposes, but will not automatically create a DER.



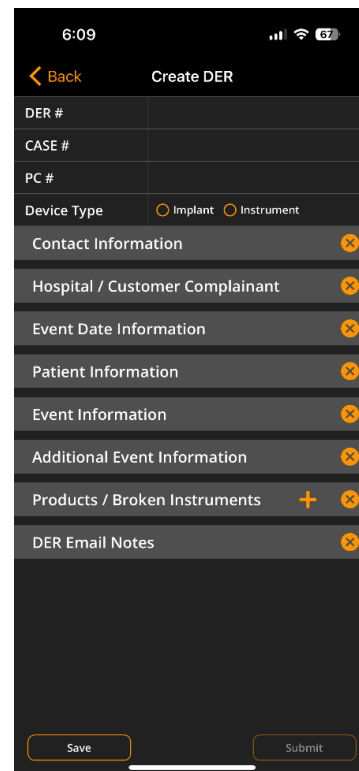
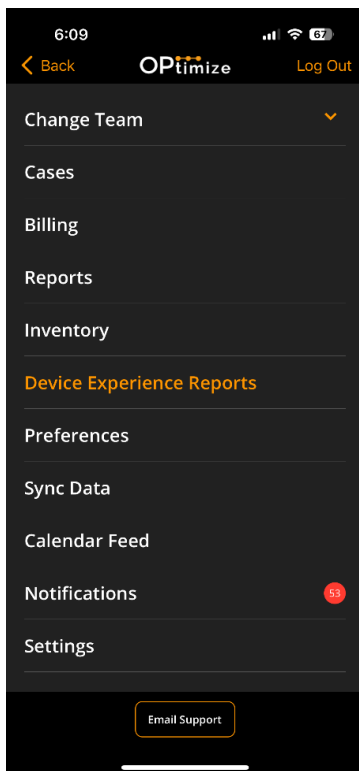
## Non-Case DERs

Non-Case DERs are not linked to a specific case in OPTimize. To add a Non-Case DER, select **Device Experience Reports** from the Main Menu. Non-Case DERs require less information since they did not happen during surgery, but no information is pre-populated.

Once all required fields are entered, choose **Save** to save your progress.

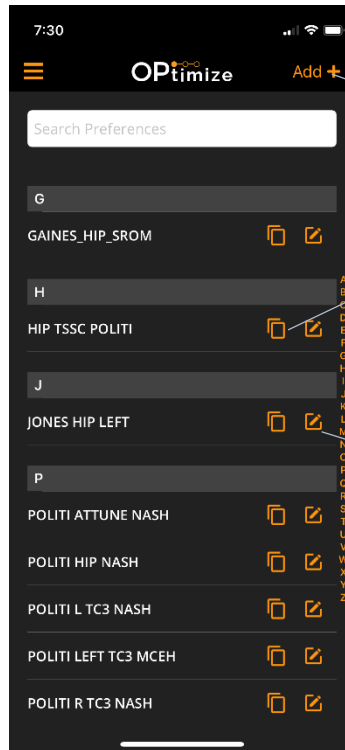
NOTE: You are not able to submit the DER until it has been saved.

When complete, choose **Submit** to send the DER to the J&J Product Complaint inbox. This will also copy your J&J email address and a contact set up by your local office.



## Preferences (Office Set Templates)

Preferences are implant and instrument set selections for recurring cases. You must be online to add, edit, or copy a Preference.



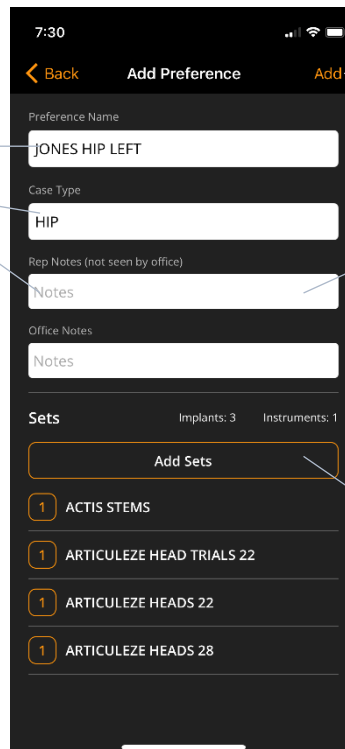
Create new Preference.

Create new Preference based on an existing Preference (i.e. copy).

Edit an existing Preference.

## Add a Preference

Enter Preference name (required).  
 Select Preference type (required).  
 Enter notes (optional).



Add new Preference (after required selections are made).

When a Preference is selected for a case, Preference Notes are transferred to the Case Notes.

Office Sets in Preference.

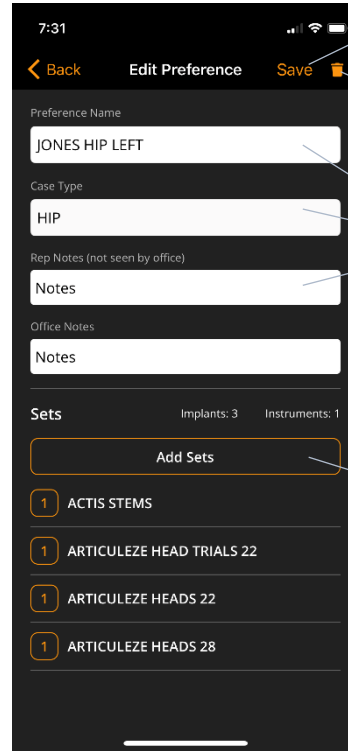
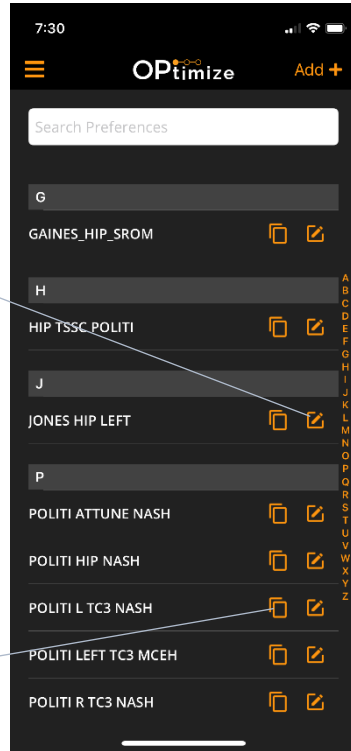
Select office sets for the Preference.



## Edit or Delete a Preference

Edit or delete Preference.

Copy Preference.



Save changes.

Delete Preference.

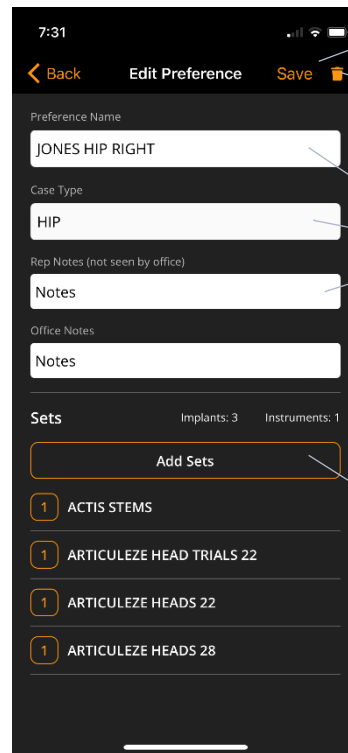
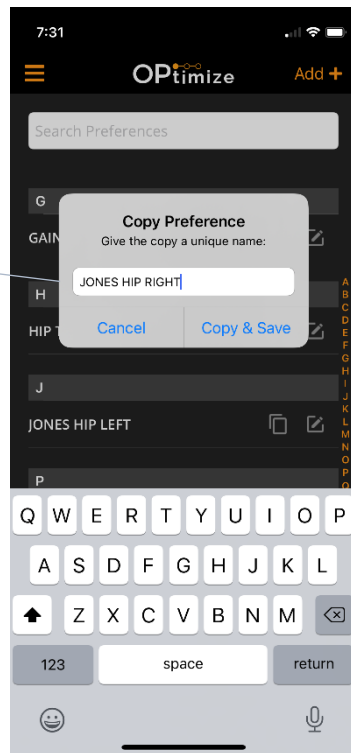
Tap to change field value.

Add or delete office sets in the Preference.

Note: To view set contents, select Add Sets.

## Copy a Preference

Enter new name.



Save new Preference.

Delete new Preference.

Tap to change field value.

Add or delete office sets in the Preference.

## Products Used in a Case (Scanning, Submitting, and Viewing)

Products used in a case are scanned (or entered) using the scheduling app. This data is then submitted to the office for processing (i.e. ordering replenishments and billing). As part of this process, the user will designate the inventory type (e.g. Office, Consignment, etc) and will upload an image of the sticker sheet (i.e. DGR) that is created for the hospital.

Products can be scanned online or offline (i.e. a data connection is not required), however, the user must have a data connection to upload DGRs and submit the products to the office.

Products can no longer be scanned once the office has processed the submitted products. If changes are needed at this point, the user should contact the office directly.

VELYS utilization is tracked.

### **Process Overview**

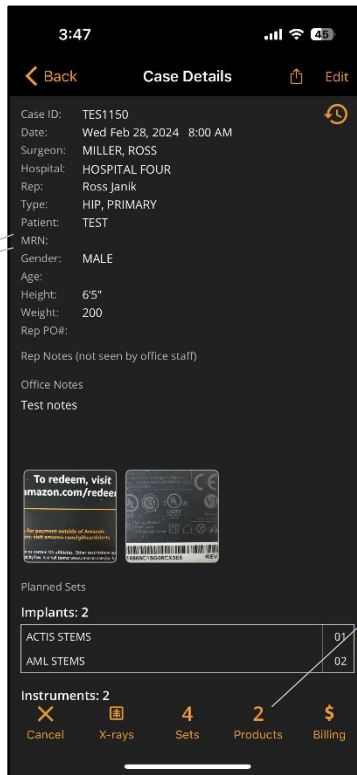
- Scan product and lot number for each item used.
- Select the Inventory Type (Office, Consignment, etc).
  - o Include the Set # if the inventory is from the office.
- Add Notes or Other Charges if necessary.
- Upload an image of the sticker sheet (aka: DGR – Delivered Goods Report) that is created in the OR.
- Save the products data.
- Submit the products data to the office.

## Entering Products

Select the **Products** button on the Case Card or *Case Details* screen to scan (or enter) products.

Note: Patient and/or MRN must be entered before products can be added.

**Patient and/or MRN must be entered before products can be added.**



Add/view products used in surgery.

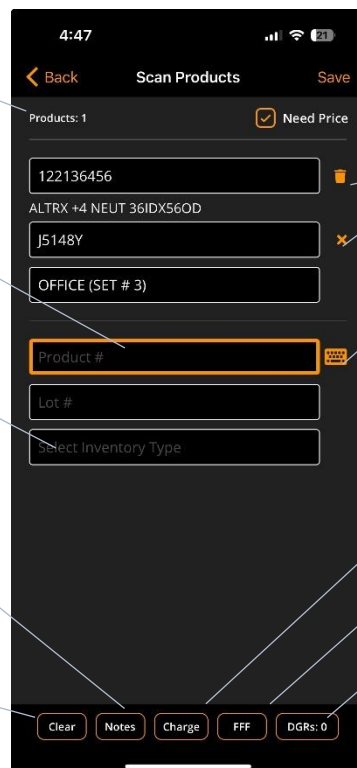
Count of products.

Tap to begin scanning products.

**Designate inventory type.**  
\*\*\*Required\*\*\*

Add notes about the products (e.g. specific shipping requests for reloads).

Clear all products.



Select to request immediate pricing from the billers.

Delete a product/lot #.

Manually type a product #.

Add Other Charge (e.g. shipping, etc).

Form, Fit, Function acknowledgment.

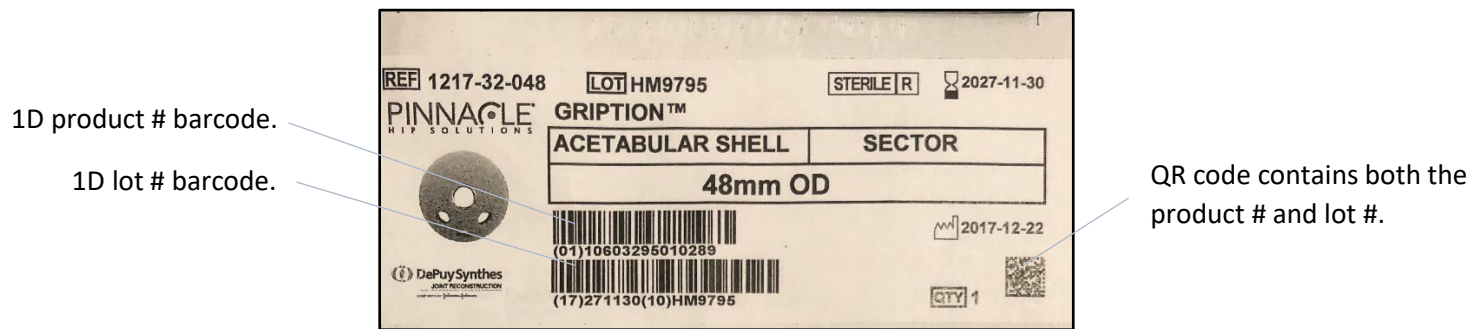
**Add a sticker sheet. \*\*\*Required\*\*\***

**Note 1:** Use the following steps to notify the office that a case was completed but nothing was used (a sticker sheet is not required):

- Select **Products** from the *Case Details* screen.
- Select **Save** on the *Scan Products* screen.
- Select **Submit** on the *Case Details* screen.

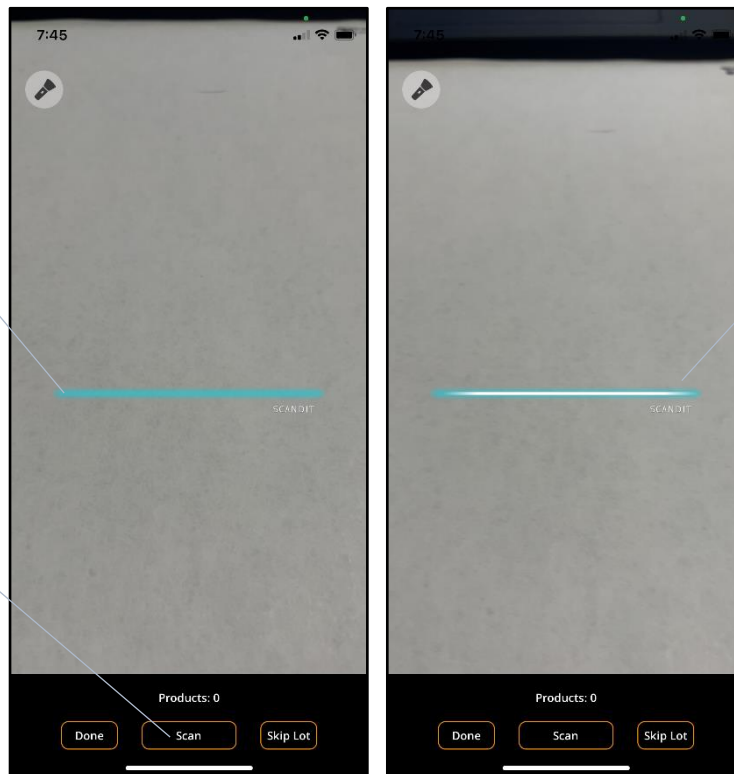
## Scanning

1D and 2D (i.e. QR codes) barcodes can be scanned. 1D barcodes contain either the product number or the lot number. QR codes contain both the product and lot number.



Aiming line is not active. Select the Scan button to activate it.

Select the **Scan** button to capture a barcode.



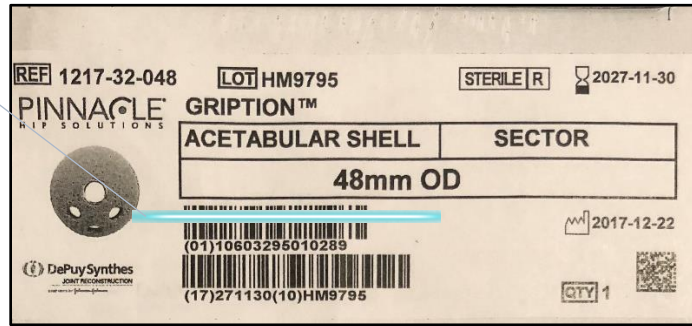
Aiming line activates and turns white when the **Scan** button is selected.

The barcode will be captured as soon as it comes into view.

Your device will “Ding” or vibrate when barcode is captured.

The barcode will be captured as soon as it comes into view.

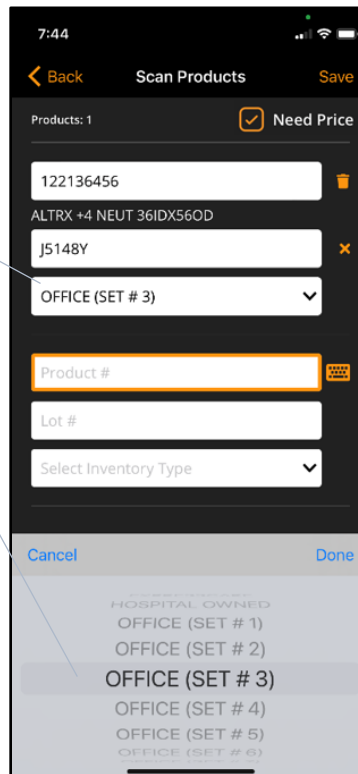
Your device will “Ding” or vibrate when barcode is captured.



## Inventory Type Designation

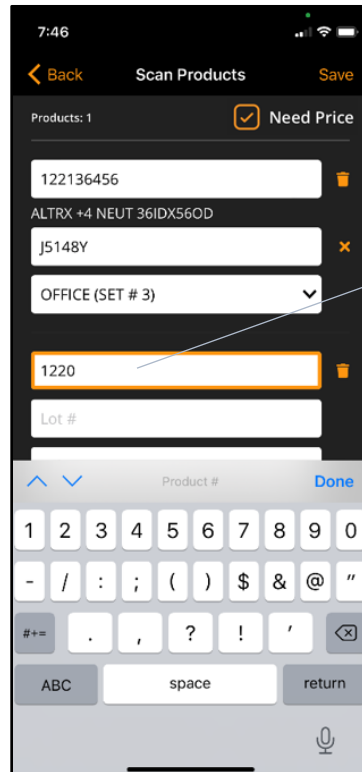
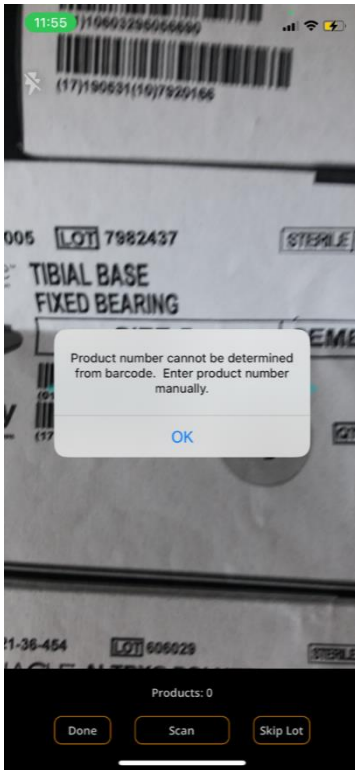
An Inventory Type must be selected for each product.

For office set, choose the correct set #.



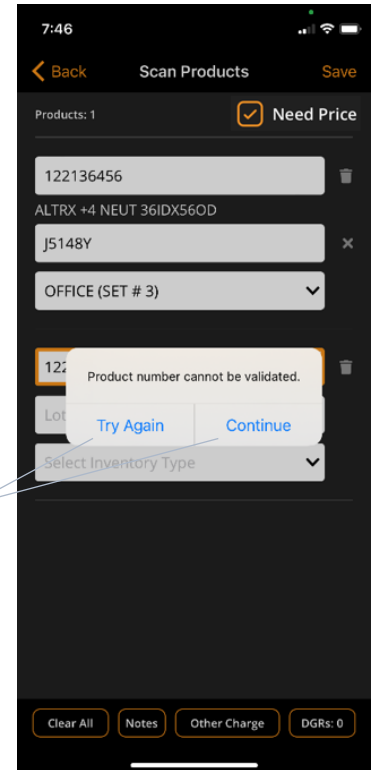
## Manually Entering Products

Occasionally, barcodes for new products may not be available in OPTimize. When this occurs, the product number can be manually entered. OPTimize then checks if the entry is a valid product and notifies the user if the entry is not valid. At this point, the user can re-enter the product number or submit the non-valid product to the office for reconciliation. Once validated by the office, the OPTimize team will be notified to add the new barcode into the system. The above steps can also be taken when a product cannot be scanned (missing or damaged barcode).



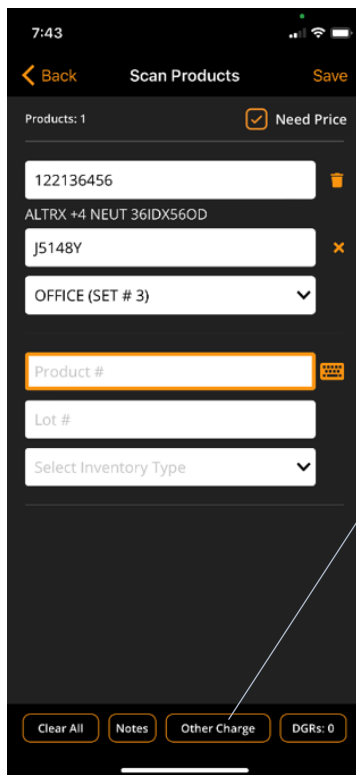
Product numbers can be entered manually.

If the product number is not validated, the user can re-enter or accept it.



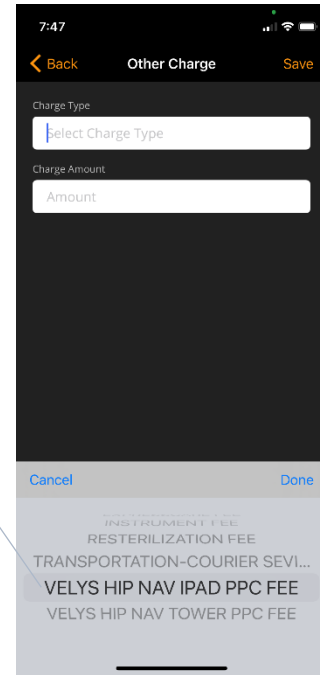
## Adding Other Charges

User **Other Charge** to enter items without a product number such as Instrument Fees and Loaner Fees.

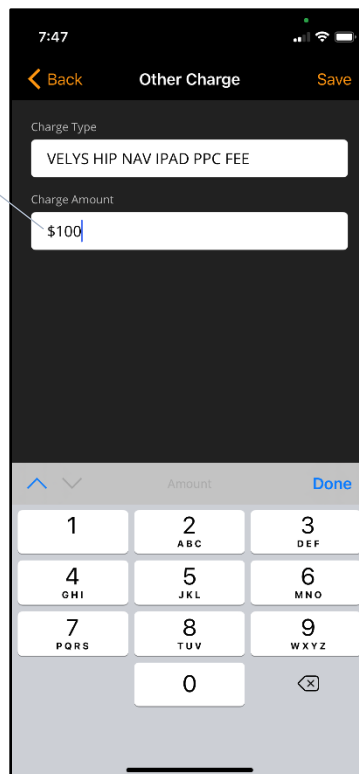


Enter an Other Charge.

Select the type of Other Charge.

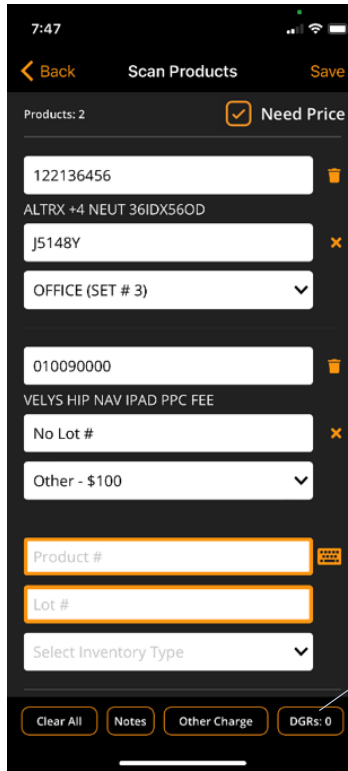


Enter amount.

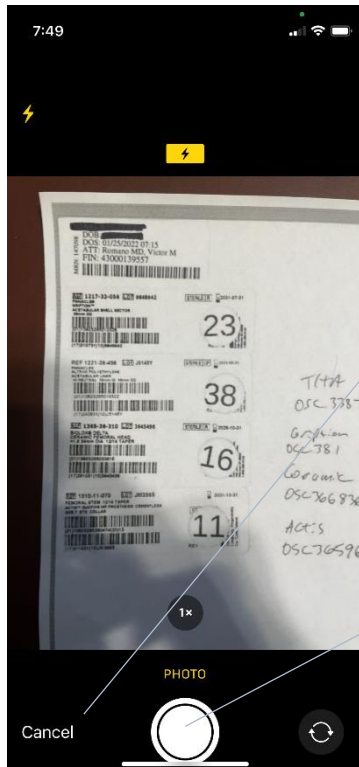


## Adding DGRs (i.e. Sticker Sheets)

DGRs can be securely uploaded to OPTimize using the scheduling app. In order to upload a DGR, the user must have a data connection. If the user is offline, they should take a picture of the DGR and then upload the photo from their Photo Library once they are online.



Upload/view/delete DGRs.



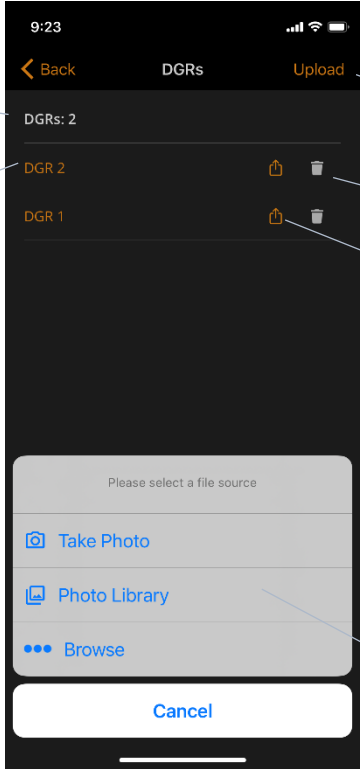
Close camera and go to the DGR screen. DGRs can be uploaded from files on the DGR screen.

Capture image.

Accept the image.







The screenshot shows the 'DGRs' screen in the app. At the top, there is a status bar with the time 9:23 and signal/battery icons. Below that is a navigation bar with a back arrow, the text 'DGRs', and an 'Upload' button. The main content area shows 'DGRs: 2' and a list of two items, 'DGR 2' and 'DGR 1'. Each item has a share icon and a delete icon. A modal dialog is open over the bottom half of the screen, titled 'Please select a file source', with options: 'Take Photo', 'Photo Library', and 'Browse'. A 'Cancel' button is at the bottom of the modal.

Count of DGRs uploaded.

View uploaded DGR

Upload a DGR.

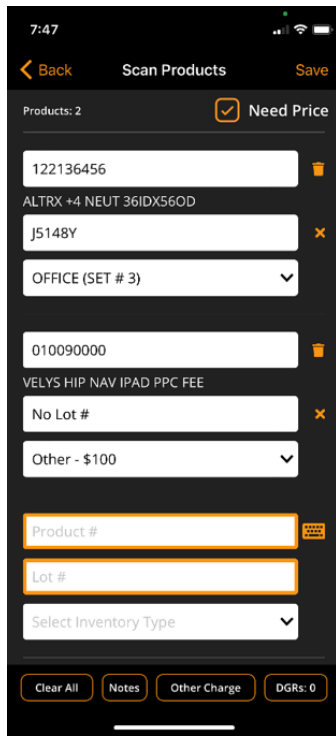
Delete a DGR.

Send DGR via email, text, etc. using a link that expires in 1 hour.

Note: a PDF file can be sent by viewing the DGRs and then selecting the Send icon.

Select and existing image to upload.

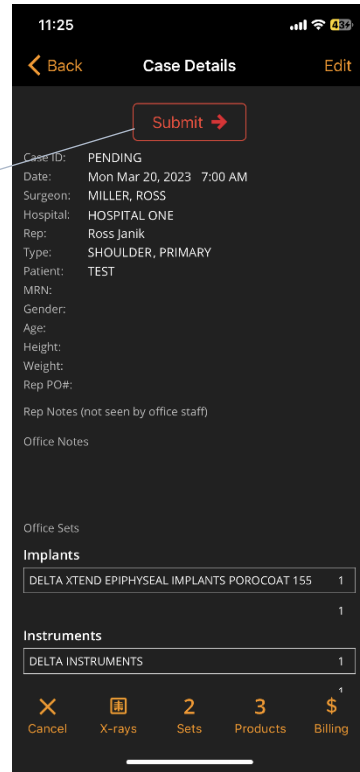
## Submitting Products



Save products.

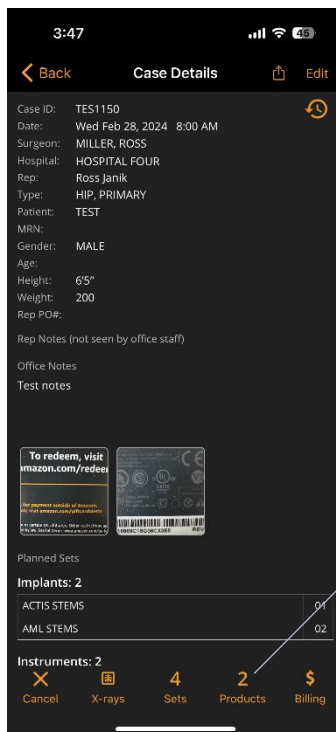
Submit products.

Note: Products can also be submitted by swiping left on the Case Card.



## Viewing Submitted Products

After the office has processed the products, they can be viewed by selecting the **Products** button. At this point, additional products cannot be added via the app. The user should contact the office directly about any changes.

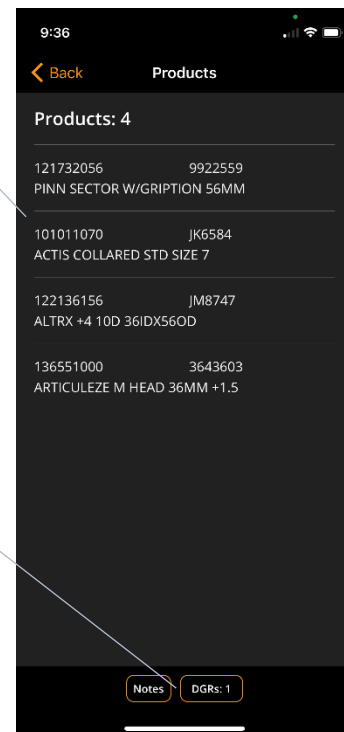


Product #, Lot #, and Product name.

View products.

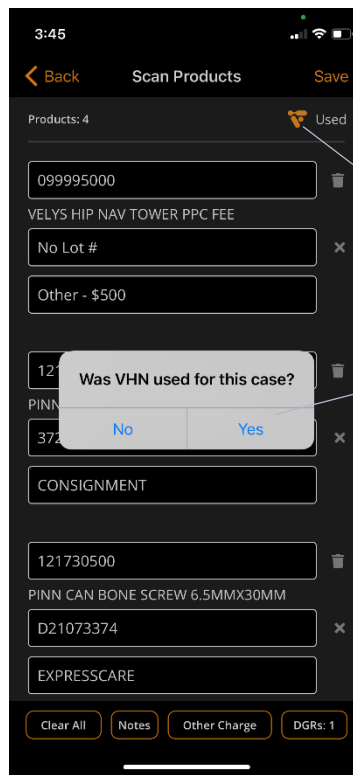
View Notes and DGRs.

**Note:** Additional DGRs can be uploaded, but no other changes can be made.



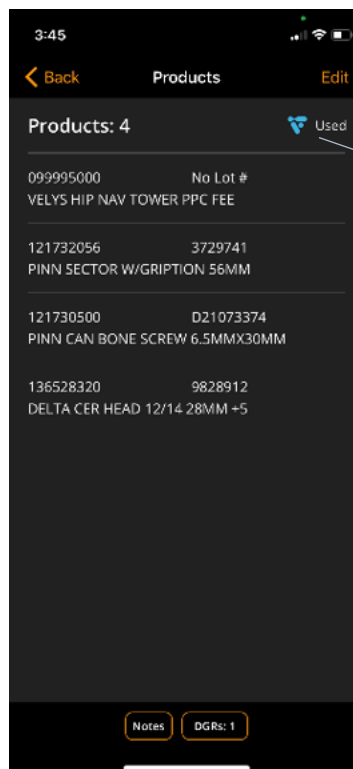
## VELYS Tracking

VELYS utilization is tracked for accounts that have acquired this technology. Once the office designates accounts with VELYS (contracts or purchased technology), the app will prompt the user when entering products.



VELYS icon appears for any account with VELYS technology.

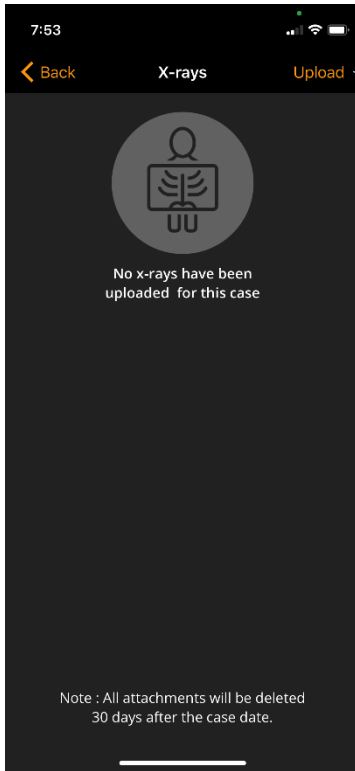
Tap VELYS icon to change status from "Used" to "Not Used".



VELYS icon and usage also appear on the Products screen. The status cannot be changed here.

### X-Rays

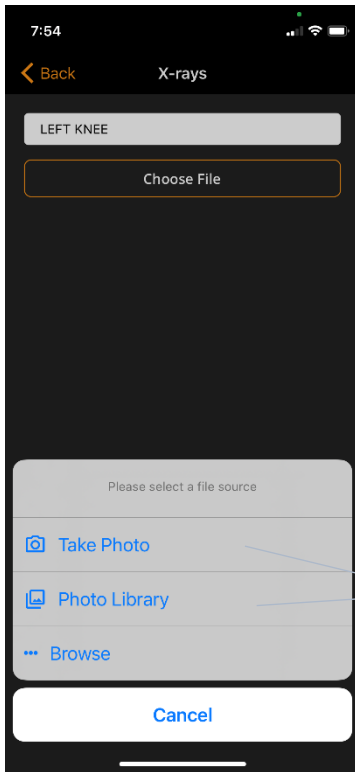
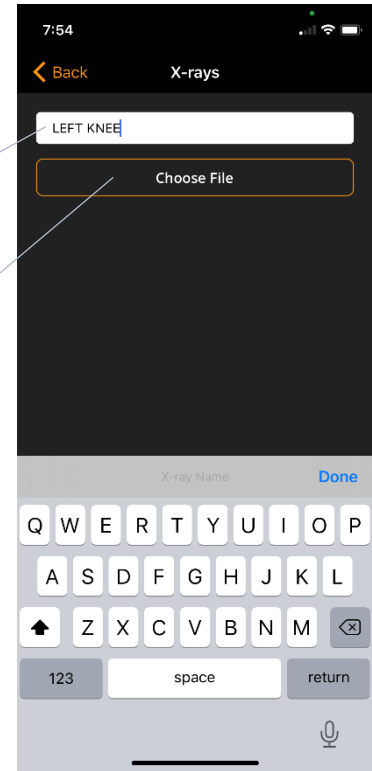
X-ray images can be uploaded for a case.



Upload new x-ray image.

Enter a name for the x-ray.

Select the x-ray to upload or take a new image with your device.



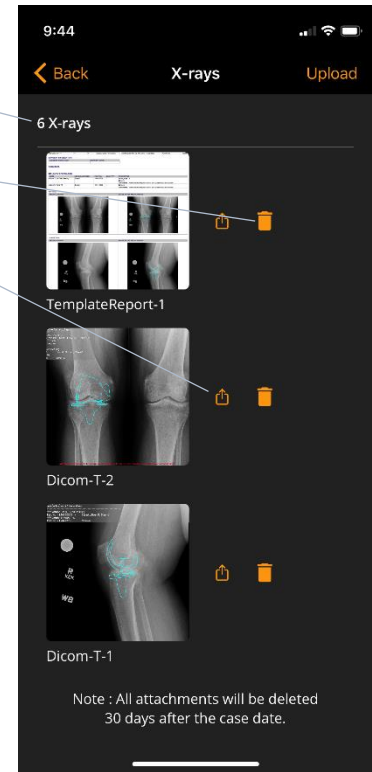
Select the x-ray to upload or take a new image with your device.

Total # of x-rays uploaded.

Delete x-ray.

Send X-ray via email, text, etc. using a link that expires in 1 hour.

Note: a PDF file can be sent by viewing the X-ray and then selecting the Send icon.



## Billing

Billing information is only available when a user is online.

\*\*\*Note: The billing totals in OPTimize are not the official record and only include products and services for cases entered in OPTimize.

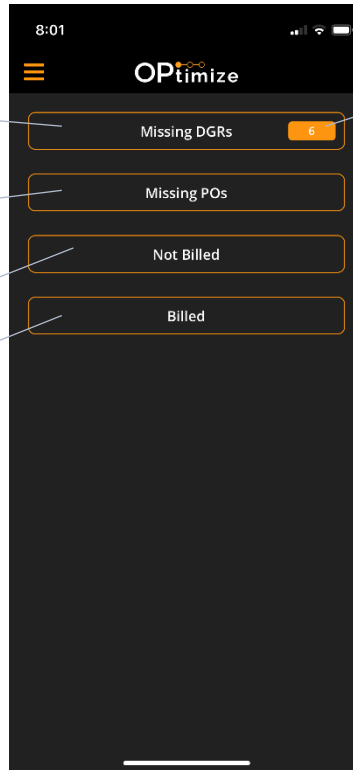
View cases missing DGRs.

View cases missing POs.

View cases not billed.

Search billed cases.

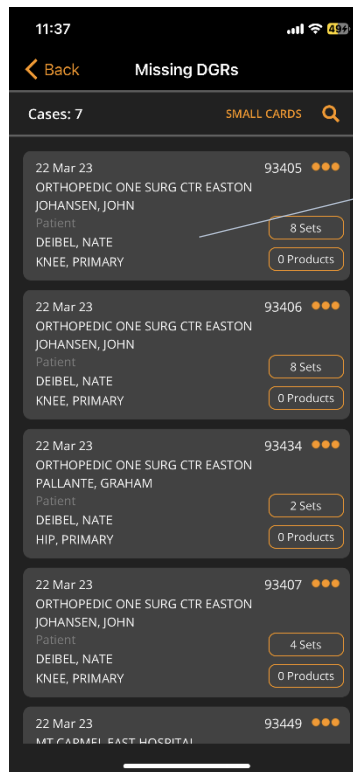
**Note:** Requires sales access. Contact your office for sales access permission.



Count of cases missing DGRs. This is the only button with a counter badge.

## Missing DGRs

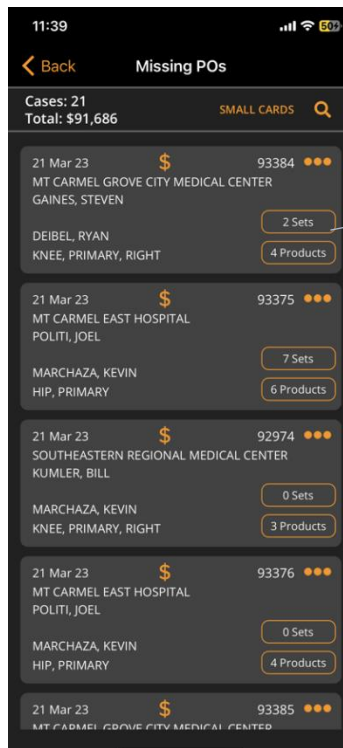
This screen shows cases that are missing DGRs (i.e. no products submitted). To clear cases from this screen, submit products or cancel the case.



Tap to view the Case Details. To clear cases, submit products or cancel the case.

## Missing POs

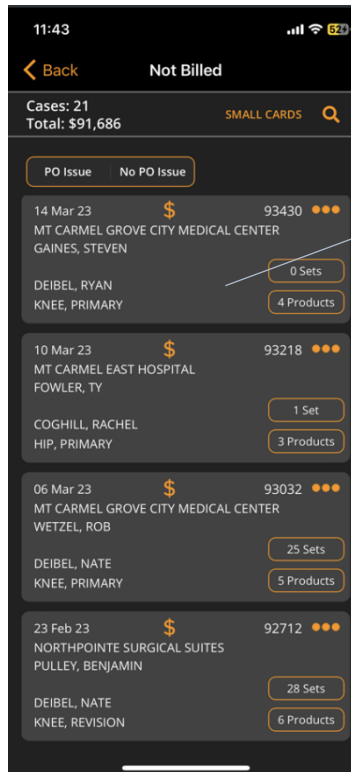
This screen shows cases with missing purchase orders.



Tap to view case details.

## Not Billed


This screen shows cases that have a price entered but are not yet billed.



Tap to view case details.

## Billed Cases

This screen allows a user with sales access to search billed cases.



Results of search.

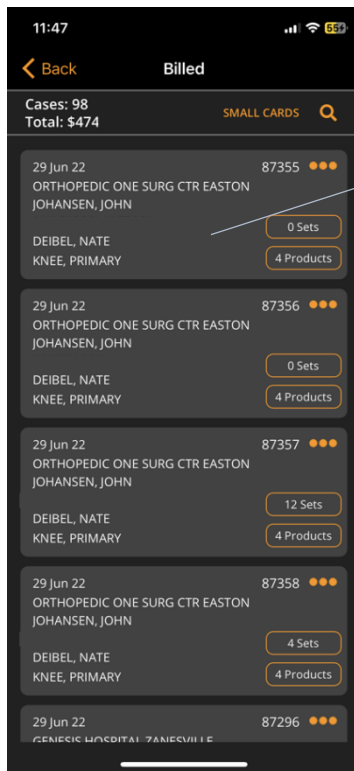
Select for a predefined search period.

Enter search parameters.

Select to execute search.

View cases from the search.

The screenshot shows the 'Search Billed Cases' interface. At the top, it displays 'Cases: 82' and 'Total: \$372,493'. Below this are two buttons: 'Month-to-Date' and 'Year-to-Date'. The 'Time Period' section contains two date input fields: '06-01-2022' and '07-06-2022'. Below the time period are several search filters: 'Type' (with 'KNEE' entered), 'Surgeon' (with 'Surgeon' entered), 'Hospital' (with 'Hospital' entered), 'Procedure' (with 'Procedure' entered), 'Side' (with 'Side' entered), and 'Patient' (with 'Patient' entered). At the bottom, there are two buttons: 'Search' and 'View Cases'.



The screenshot shows the 'Billed' screen. At the top, it displays 'Cases: 98' and 'Total: \$474'. Below this is a 'SMALL CARDS' section with a search icon. The list of cases includes:

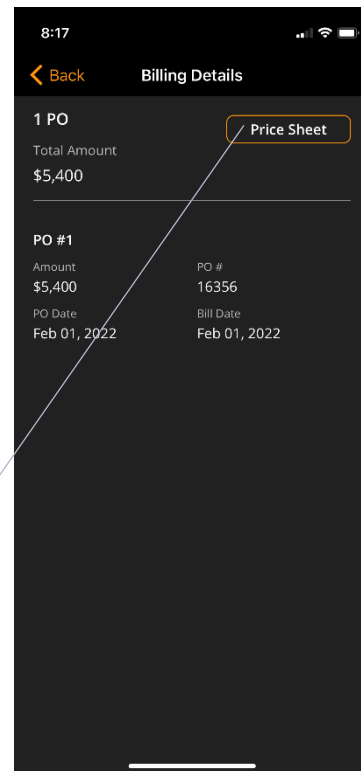
- 29 Jun 22, ORTHOPEDIC ONE SURG CTR EASTON, JOHANSEN, JOHN, 87355, 0 Sets, 4 Products
- 29 Jun 22, ORTHOPEDIC ONE SURG CTR EASTON, JOHANSEN, JOHN, 87356, 0 Sets, 4 Products
- 29 Jun 22, ORTHOPEDIC ONE SURG CTR EASTON, JOHANSEN, JOHN, 87357, 12 Sets, 4 Products
- 29 Jun 22, ORTHOPEDIC ONE SURG CTR EASTON, JOHANSEN, JOHN, 87358, 4 Sets, 4 Products
- 29 Jun 22, GENERIC HOSPITAL, 7ANECVILLE, 87296, 0 Sets, 4 Products

Tap to view case details.



On the Case Details screen, select Billing Details to see the billing details.

Select to view Price Sheet (if available).



The screenshot shows the 'Billing Details' screen. At the top, it displays '1 PO' and 'Total Amount \$5,400'. Below this is a 'Price Sheet' button. The 'PO #1' section includes:

- Amount: \$5,400
- PO #: 16356
- PO Date: Feb 01, 2022
- Bill Date: Feb 01, 2022



## Advance Case Management (ACM)

ACM leverages automated digital case data feeds from customers and TruMatch digital templating to increase efficiencies in joint reconstruction surgeries by improving the planning and logistics processes. ACM cases are scheduled directly by the customer. X-rays are then templated by TruMatch resulting in a PDF report (Template Report) and planned parts for the case. This data is presented to the sales rep in the OPTimize Scheduling App as follows:

- New ACM cases are automatically added to the OPTimize Scheduling App and are designated with “(ACM)” after the Case Number. Reps cannot add an ACM case.
- New ACM cases will be in “RED” (i.e. not submitted) status, but are visible to the office immediately.
- Reps will be notified via push notification for significant ACM events for cases within the next 14 days.
- If an ACM case changes, the change will be reflected in OPTimize and the rep team will receive a push notification if the case is within the next 14 days.
- If an ACM case is canceled, the case is flagged as cancelled in OPTimize and the rep team will receive a push notification if the case is within the next 14 days. A rep must cancel the case in order for it to be removed from OPTimize.
- If a rep cancels an ACM case in OPTimize (not already canceled by ACM), the ACM system is notified and any future updates sent from ACM are NOT accepted.
- Only 4 fields related to case information can be edited by the sales rep: Date, Time, Procedure Type, and Side. If any of these fields are updated by the user, they are locked from receiving future updates from ACM.
- Reps can request additional sets (if needed) in the app as usual.

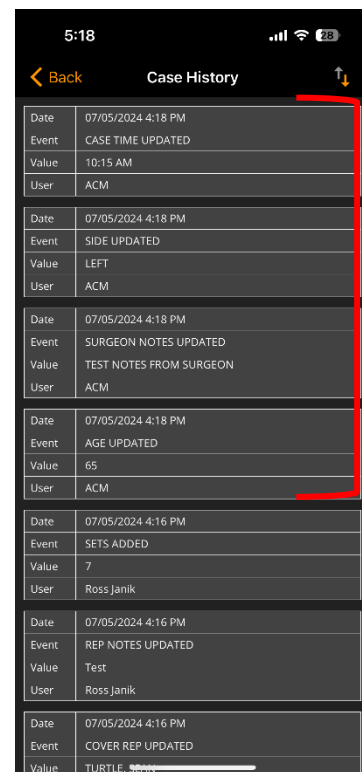
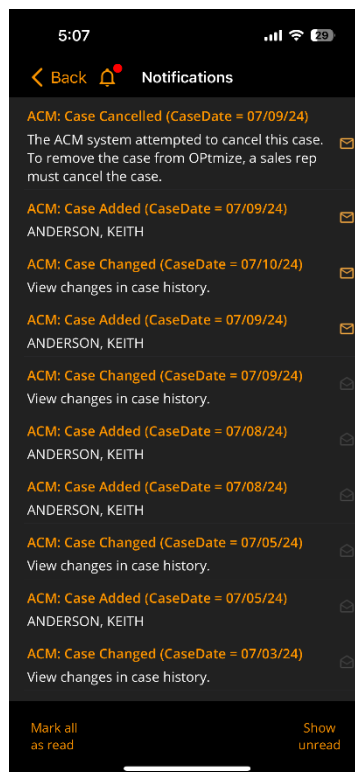
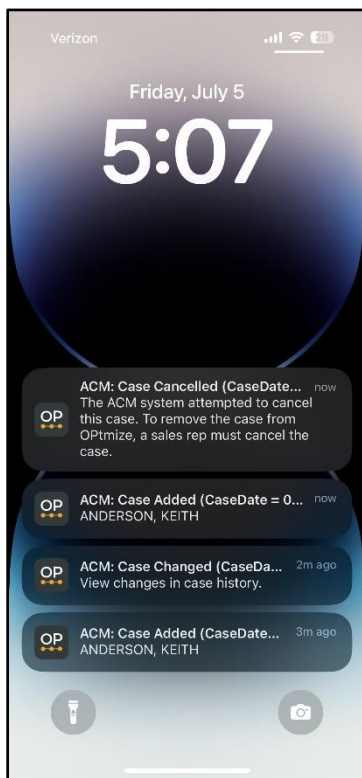
### Available features for future use as directed by the Depuy ACM team

- Reps can select the ACM parts that they want for the case.
- ACM parts for cases during a given week will typically be ordered either on Wednesday or Thursday of the previous week.
- If an ordered ACM part is not used, it will remain at the customer’s location and will be tracked by OPTimize for use in future ACM cases.
- Reps and the office must work closely to manage the ACM inventory at an account. Frequent cycle counting is recommended.

## Push Notifications

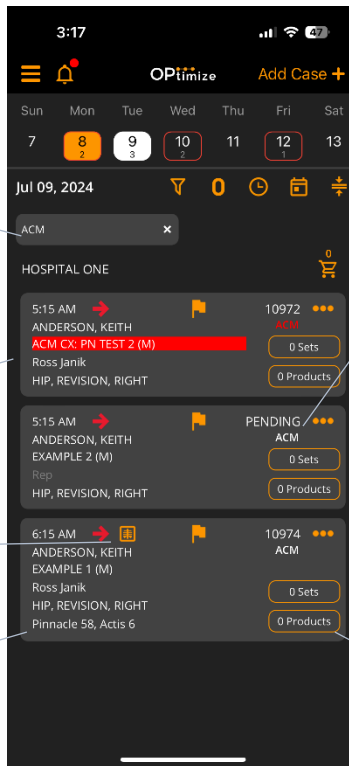
OPTimize will send push notifications for new and changed cases that are scheduled within the next 14 days. Reps also receive an email if a selected ACM part is on backorder. For changed cases, push notifications are only sent for the following changes and can be viewed in the Case History screen.

- Case date
- Case status (cancelled or reactivated)
- Surgeon
- Customer
- Procedure
- Side
- Surgeon notes



Updated case details

Case Details



ACM filter selected. Only ACM cases are shown.

ACM cancelled the case. Rep needs to cancel to remove it from OPTimize.

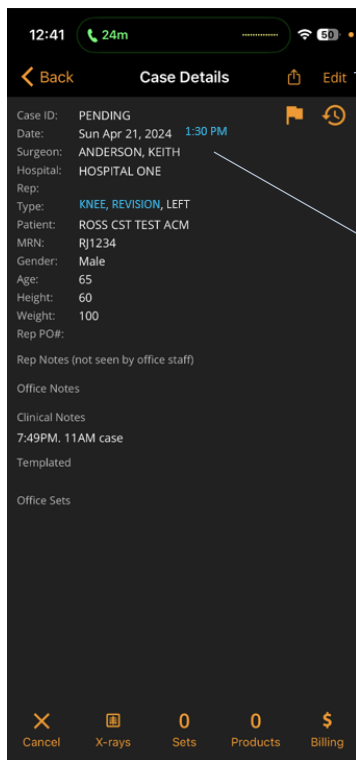
X-rays. View Non-Templated DICOMs, Templated DICOMs, and Template Reports.

Templated parts.

Designates an ACM case.

**Note:** New ACM cases will be in **Red** status and must be submitted by the rep. The rep must select any Templated Products that they want available for the case. Templated products are **NOT** automatically ordered.

View/select Planned and Actual parts.



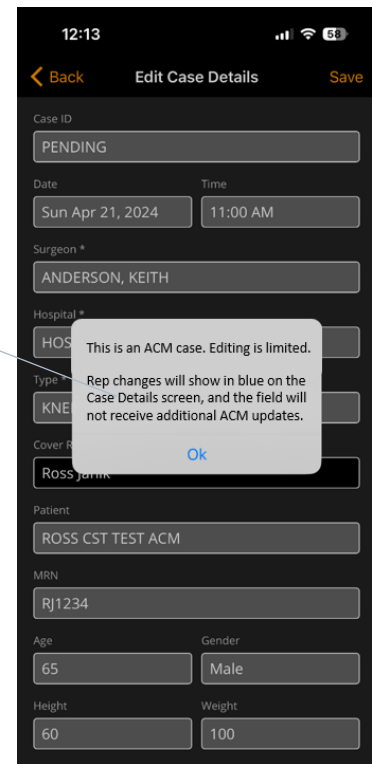
The following fields sent by ACM can be edited. If changes are made by a user, that field will display in blue on the Case Details screen and future ACM updates will not be accepted:

- Case Date
- Case Time
- Procedure Type
- Side

These remaining fields are OPTimize only and can be edited at any time.

- Cover Rep
- Rep PO
- Rep Notes
- Office Notes

All other fields come from ACM and cannot be changed.



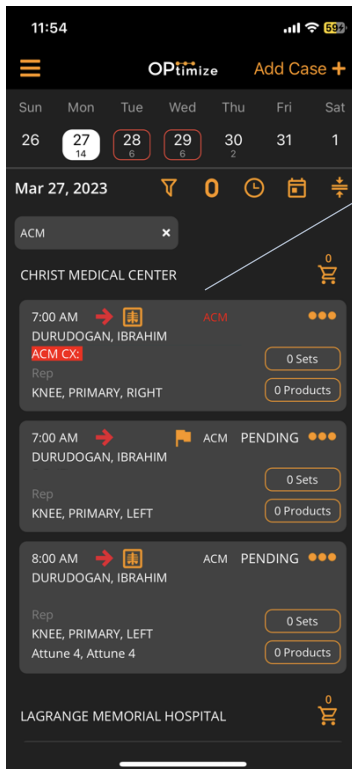
This is an ACM case. Editing is limited.  
Rep changes will show in blue on the Case Details screen, and the field will not receive additional ACM updates.

## Cancelled Case

Reps can cancel an ACM case in OPTimize, however this will cancel the case permanently and it cannot be reactivated. If ACM sends future updates for that case, they will not be accepted.

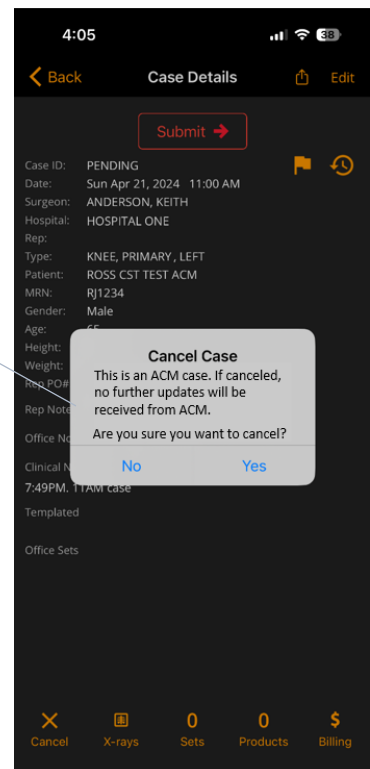
If a case is cancelled by ACM, a notification is sent via OPTimize so that the rep can cancel the case. The case will not automatically be cancelled and can be reactivated by ACM.

OPTimize will append "ACM CX:" to the patient field and highlight the patient field in RED as an indication to the rep that ACM cancelled the case (see screenshot below). Additionally, if the case is within the next 14 days, the rep will receive a push notification.



ACM cancelled the case.  
Rep needs to cancel to  
remove it from OPTimize.

If an ACM case is cancelled  
by a sales rep, it cannot be  
reactivated.



## X-rays (DICOMs and Template Report)

ACM files are available on the *X-rays* screen.

- Dicom-NT-1 = Non-Templated DICOM image #1
- Dicom-T-1 = Templated DICOM image #1
- TemplateReport-1 = Template Report from the DICOM image

View Non-Templated DICOMs, Templated DICOMs, and Template Reports.

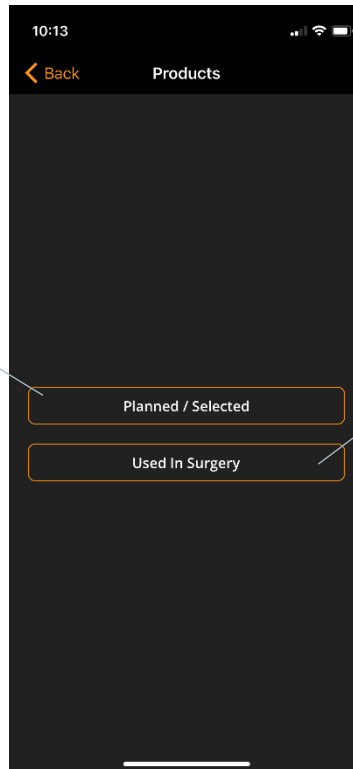


## Products

Templated products are viewed by selecting the **Products** button on the either the Case Card or *Case Details* screen. The user can view templated parts and then select parts for the case. **Only Selected Products will be provided for the case.** Once parts are selected and submitted, the office will either reserve (if the part is in ACM inventory) or order the part.

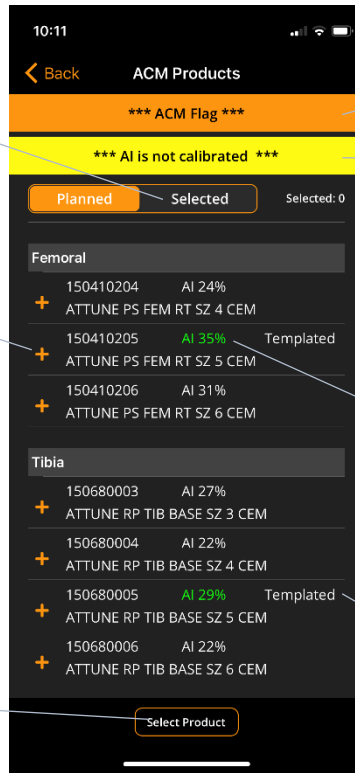
Note: Reps should not select parts until the ACM team coordinates with the office and informs the rep.

View/select Planned parts for ACM case.



Scan products used in surgery.

**Note:** Select Inventory Type = CONSIGNMENT for any ACM products used.



View Selected parts.

Tap to see ACM flag messages.

Tap to select product.

Indicates that AI is not yet calibrated because the system has not processed at least 50 cases for the surgeon for this case type. The banner will not appear once All predictions are calibrated.

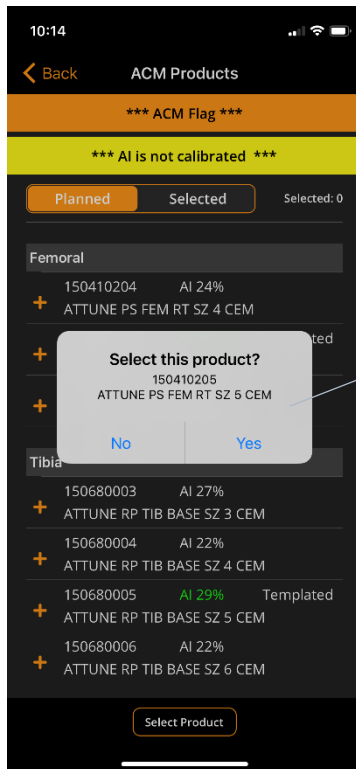
Note: Reps should not select parts until the ACM team coordinates with the office and informs the rep.

AI prediction confidence. Highest confidence is GREEN.

Selects other parts for the case.

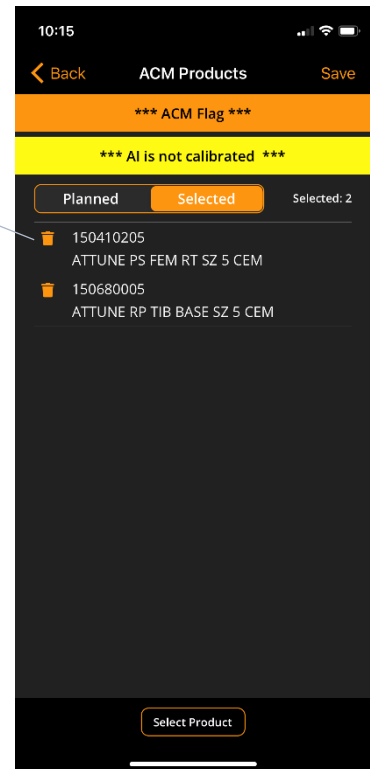
Templated by TruMatch.

**Note:** The *ACM Products* screen is view-only on or after the date of the case.



Selected parts.

Confirmation message when selecting parts.

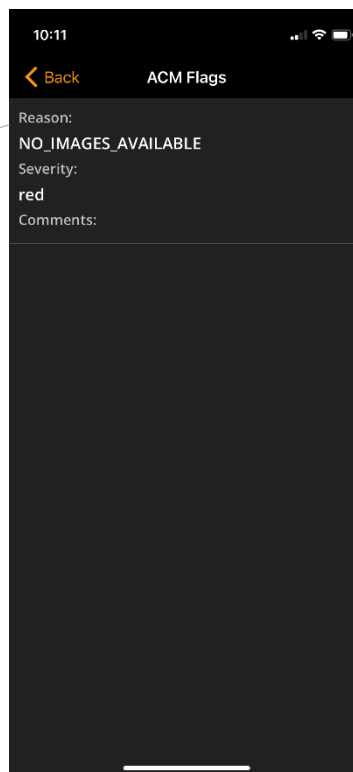


## ACM Flags

ACM flags are displayed on the *ACM Products* screen. The flag conveys additional information about the templating process. Each flag consists of three elements: 1) Reason, 2) Severity (YELLOW or RED), and 3) Comments.

- Severity = RED if TruMatch cannot template at all. The Reasons are:
  - NO\_IMAGES\_AVAILABLE
  - IMAGES\_OUT\_OF\_DATE\_OR\_WRONG\_FORMAT
  - MISSING\_CRITICAL\_IMAGES
  - UNSUPPORTED\_PROCEDURE
  - IMAGE\_TRANSFER\_OR\_EQUIPMENT\_FAILURE
  
- Severity = YELLOW: TruMatch will template but the accuracy may be impacted by one of the following Reasons:
  - MISSING\_CALIBRATION\_MARKER
  - POOR\_IMAGE\_QUALITY
  - MISSING\_LATERAL\_IMAGE
  - MISSING\_AP\_IMAGE
  - ENGINEER\_COMMENT

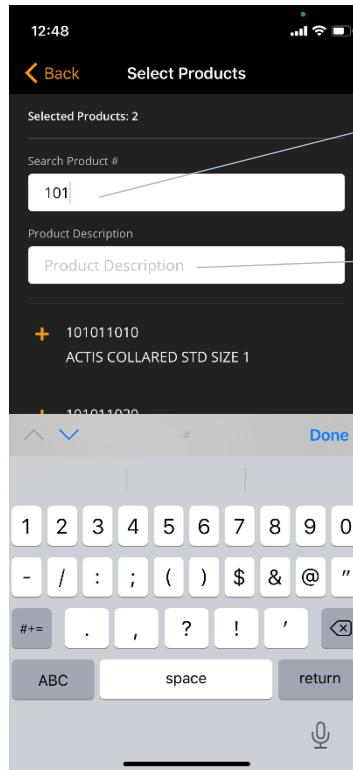
Flag fields.





## Select Products

On the *Select Products* screen, users can select additional products for an ACM case. This can include parts that were not templated for the case.

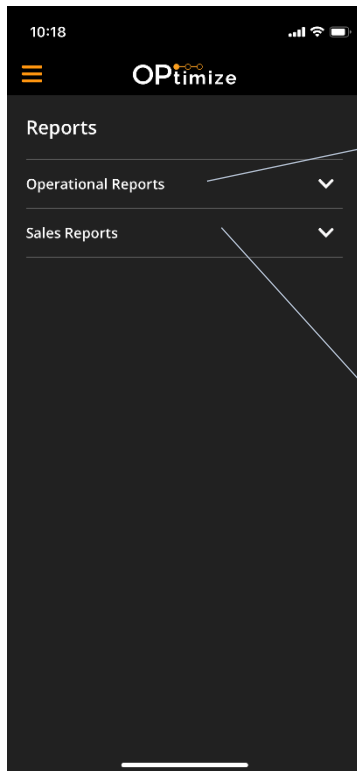


Searches for products that begin with the numbers/letters entered.

Searches for the entry anywhere in the product description.

**Note:** If data is entered in both boxes, only results that satisfy both criteria will be returned.

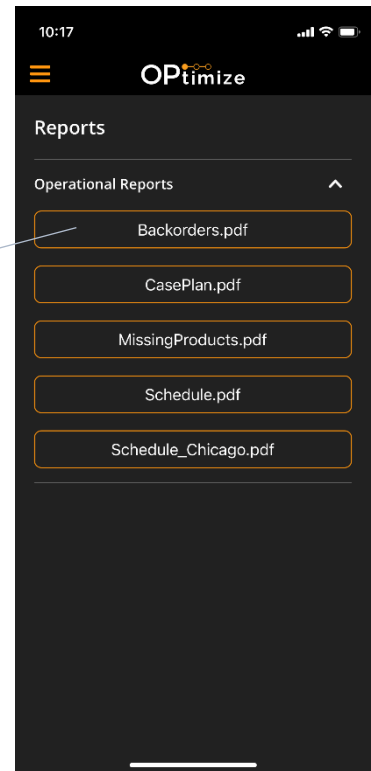
## Reports



Select type of report.

Tap to view report.

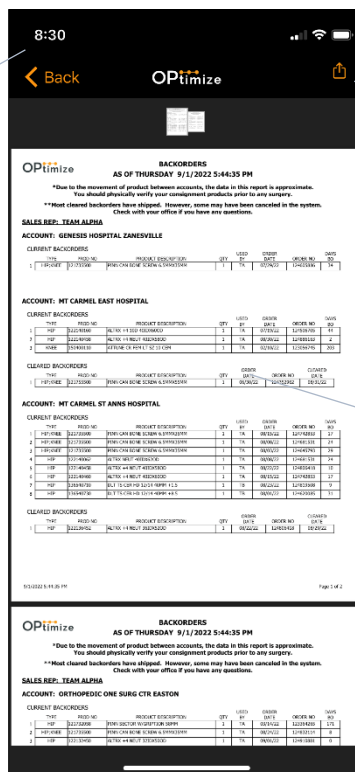
Sales Reports (if available from the office) are only available to reps with sales access. Contact your office for this access.



Return to the report list.

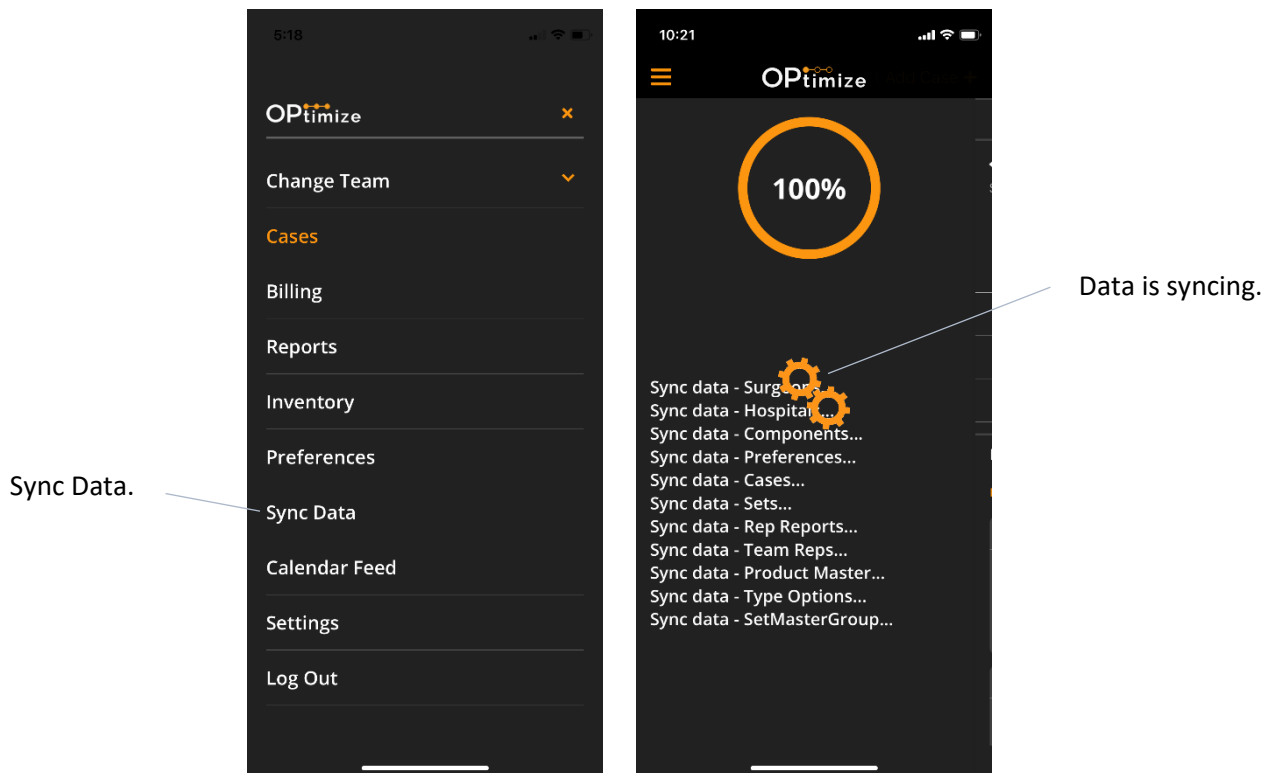
Tap to send report (email, text, print, etc.)

Swipe down (iOS) to view the toolbar at the bottom of the screen.



## Sync Data

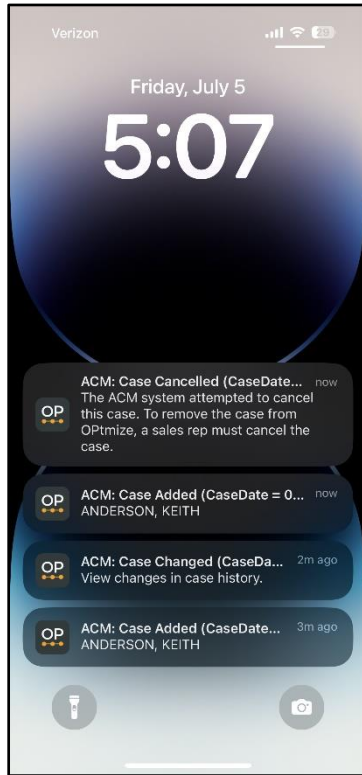
- The app will automatically synchronize the case schedules for all team members every hour. When this occurs, the user will see the *Loading...* message.
  - Example: Joe submits a new case on his device. All other members on Joe's team will not see Joe's new case until the next automatic hourly sync occurs on their device.
- If the user wants to sync the team schedule before the next hourly sync occurs on their device, they can select the **Sync Data** button on the *Main Menu*. This will force an automatic data sync.



**Note:** Synchronizing data generally takes 5 to 10 seconds with a good data connection but may take longer with a slower connection.

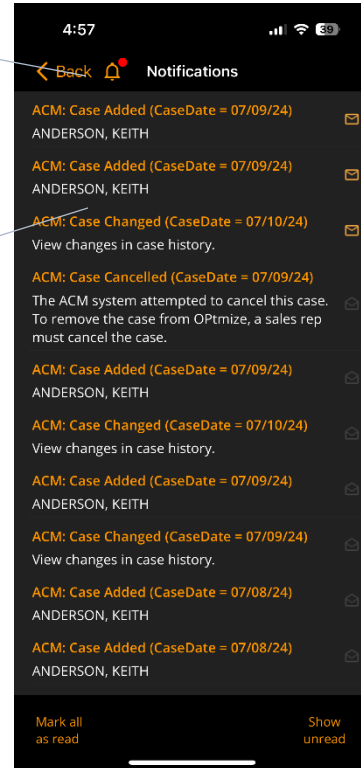
## Notifications

This screen can also be accessed by selecting the bell icon at the top of any screen. Currently notifications are only enabled for ACM cases.



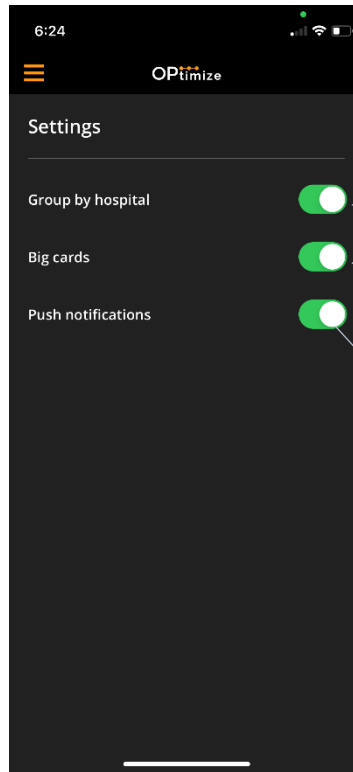
Tap to open Notifications screen.

Unread notifications shown with sealed envelope icon.



## Settings

Users can customize and control certain features on the Settings screen



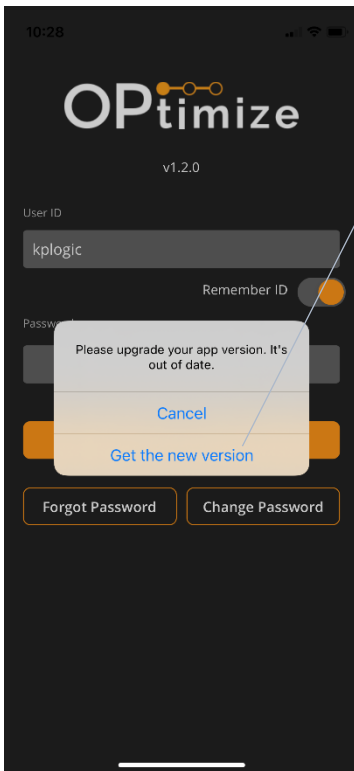
Groups case cards by hospital on the Cases screen.

Small cards are shown if this is turned off.

Allows app to send push notifications to the user.

## Installing App Updates

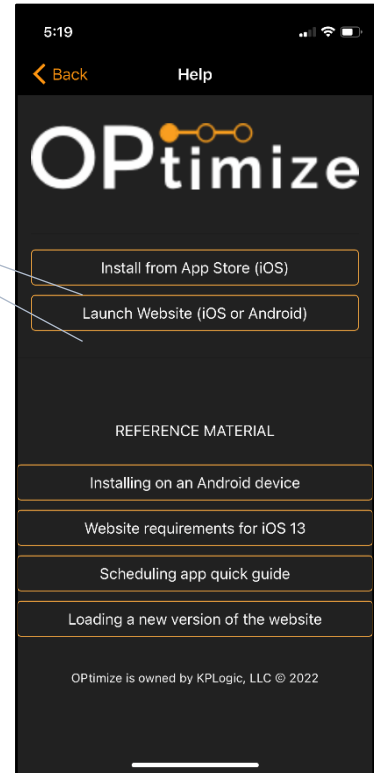
The app will notify the user when an update is available and must be installed. Unless otherwise notified, deleting the app prior to installing the update is NOT required.



Select to get the update. Deleting the app is NOT required.

Select to install the app.

Note: iOS users will not need to "Trust" the app again since the app was not deleted.



If a user needs to install the app on a new device or launch the website version, use the following link:

**[OPTimize App Link](https://app.kplogic.com/)** ----> (<https://app.kplogic.com/>)

## Troubleshooting

### Missing or Incorrect Data

**Symptom:** Data is missing or incorrect (e.g. no sets are showing on the *Sets* screen).

**Solution:** Tap **Sync Data** button on the *Main Menu* screen. If data is still missing, select **Logout** from the Main Menu, and then select **Log In** from the *Log In* screen. This performs a full data refresh. Once the app reloads, select the **Sync Data** button to complete the refresh.

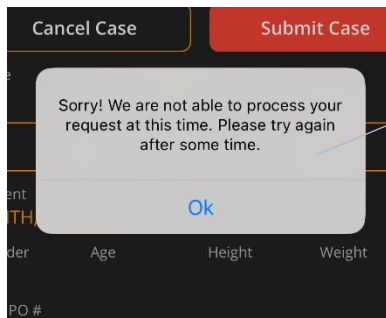
### App Freezes

**Symptom:** *Loading...* message does not disappear or app stays on the app splash screen for more than 10 seconds.

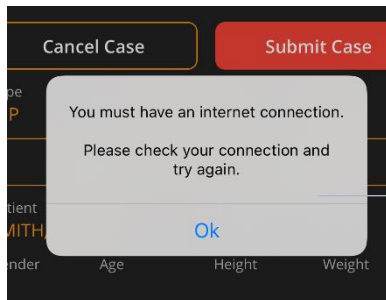
**Solution:** Close app completely and restart.

- **iPhone/iPad:** double-click the device Home button and swipe up on the app. Restart the app.
- **Android device:** tap and hold the device Home button and swipe the app left or right. Restart the app.

### Error Message



This error can be caused by connectivity or server issues. The user should check their internet connection, and then retry the task when they have a stronger signal. If the same message occurs repeatedly, the user should contact their local office.



**Note:** Hospital WiFi systems can cause issues sometimes. If possible, use cellular data. If cellular data is not available, contact the hospital's network administrator and ask them the whitelist the following domain: \*.kpllogic.com.

The app does not detect an internet connection. Try again after connecting to the internet.

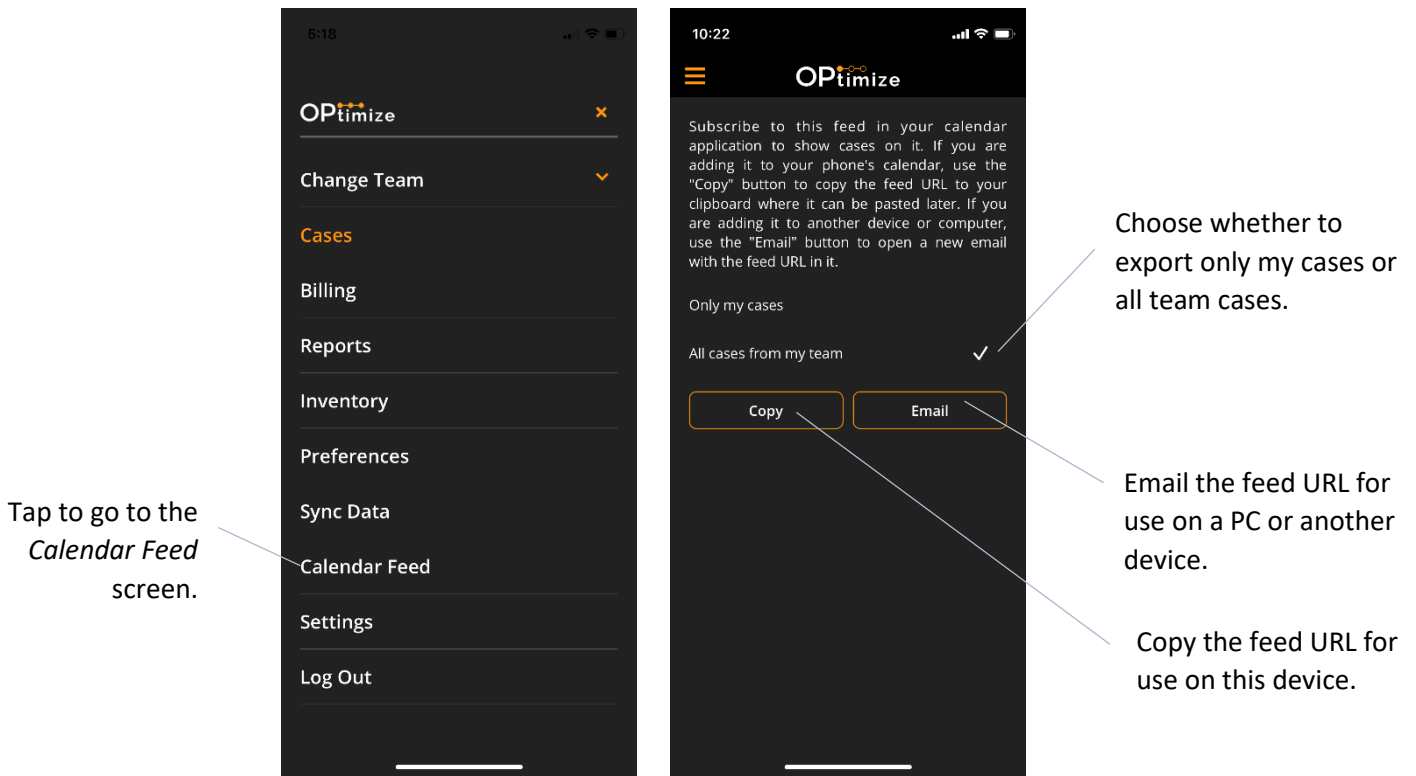
**Note:** Cellular data may not be available when a user is making a telephone call from the device.

Appendix A: Exporting the Case Schedule to an External Calendar

Users can export their individual or team case schedule to an external calendar (e.g. iPhone, Outlook, or Google) by using the provided Internet Calendar Feed.

- The calendar feed is accessed from the Month Calendar screen. Only submitted (i.e. YELLOW and GREEN) cases are exported. Only future cases and cases 30 days in the past are exported.
- Please note:
  - Calendar feeds will periodically have to be set-up again as phone and network upgrades will sometimes cause them to stop functioning.
  - Once a case is submitted in the app, it takes about five minutes before that case is available to be exported to a calendar.
  - The feed is updated based on the external calendar’s settings. Outlook and iOS have the ability to update on demand. However, Google Calendar typically only updates approximately once daily. We have no control over this timing.

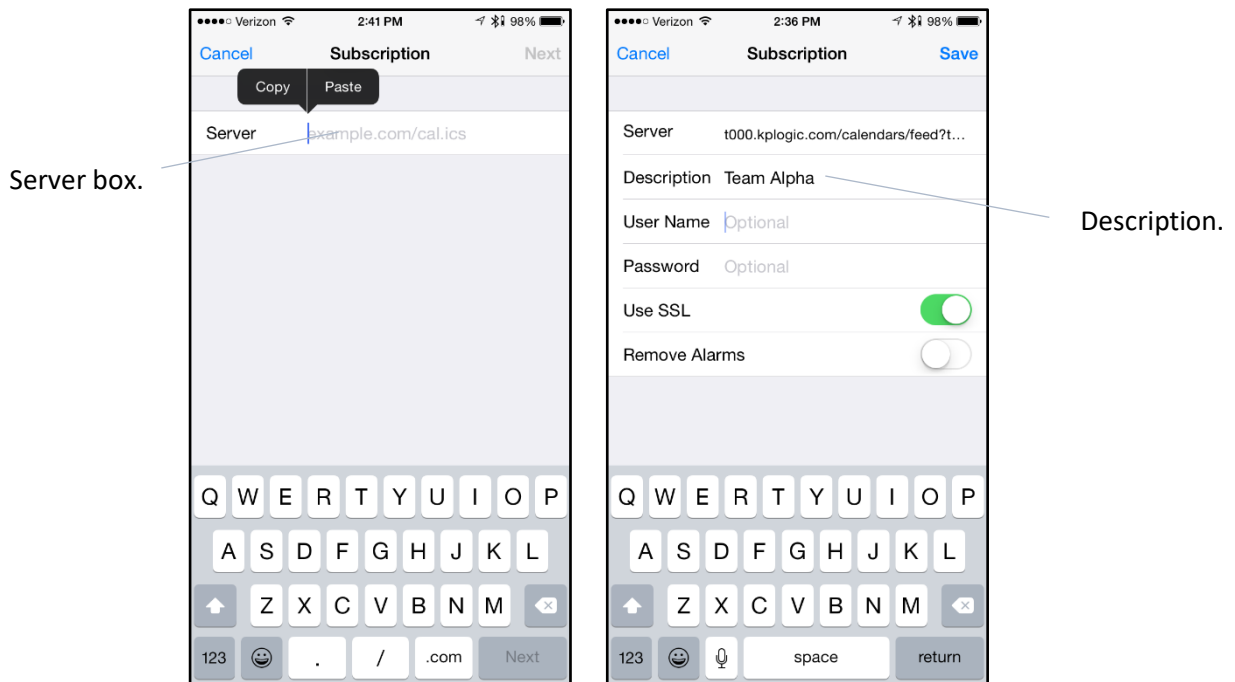
Obtaining the Feed from the App





## iOS Calendar Feed

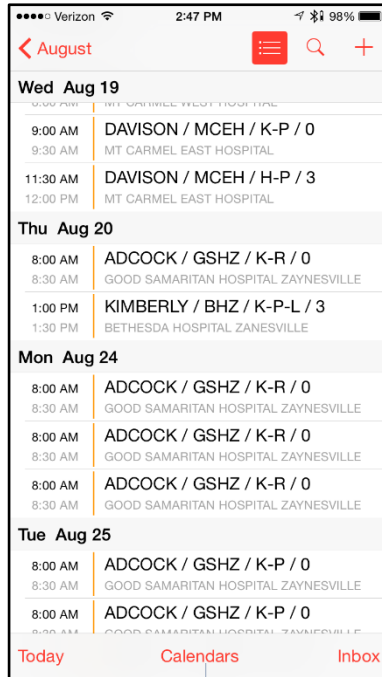
- Copy the desired feed URL (my cases or entire team's cases)
- Return to the *Home* screen by clicking the *Home* button
- Select the *Settings* icon from the home screen
- Select **Mail**
- Select **Accounts**
- Select **Add Account**
- Select **Other**
- Select **Add Subscribed Calendar**
- Paste the URL into the Server box (see below)
- Select **Next**



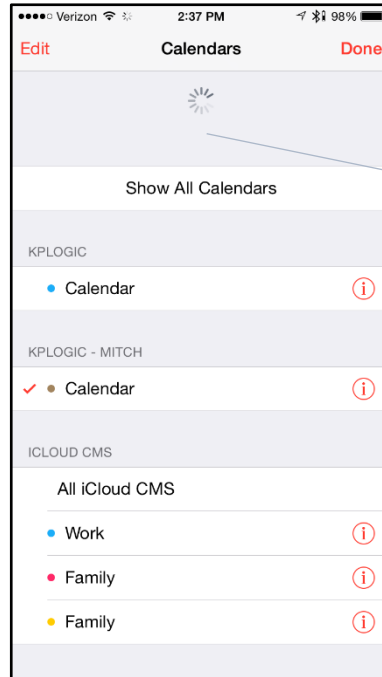
- If desired, change the *Description* (e.g. Team Alpha) (see above)
- Select **Save**

You can now view the feed on your iOS calendar.

In order to refresh the feed, select **Calendars** from the bottom of the iOS calendar screen. Then, touch and drag the screen down a little. A spinner will appear at the top of the screen while the calendars are refreshed.



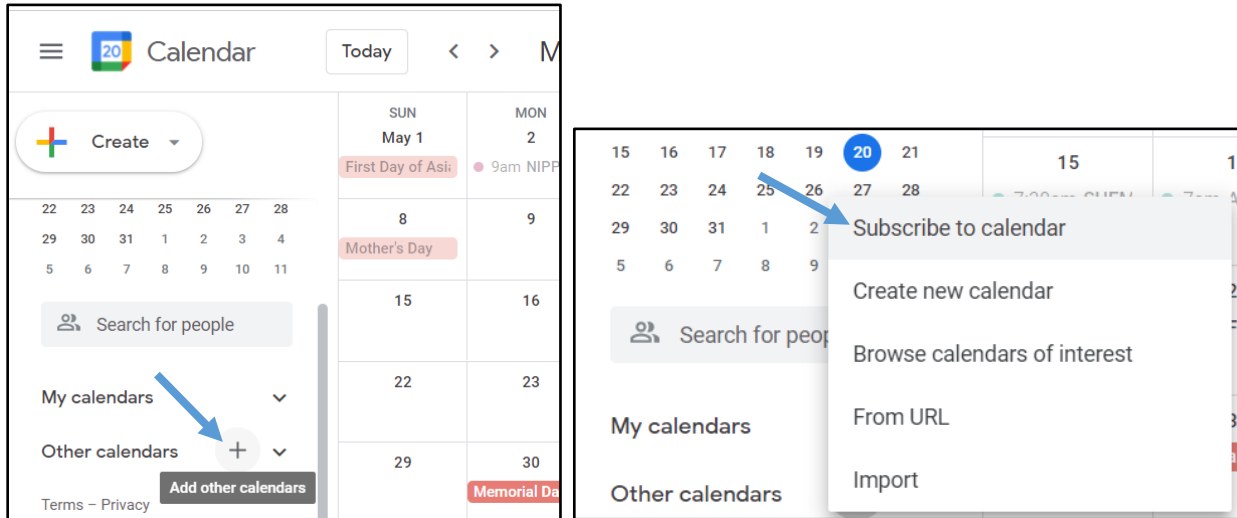
To refresh, tap  
*Calendars*.



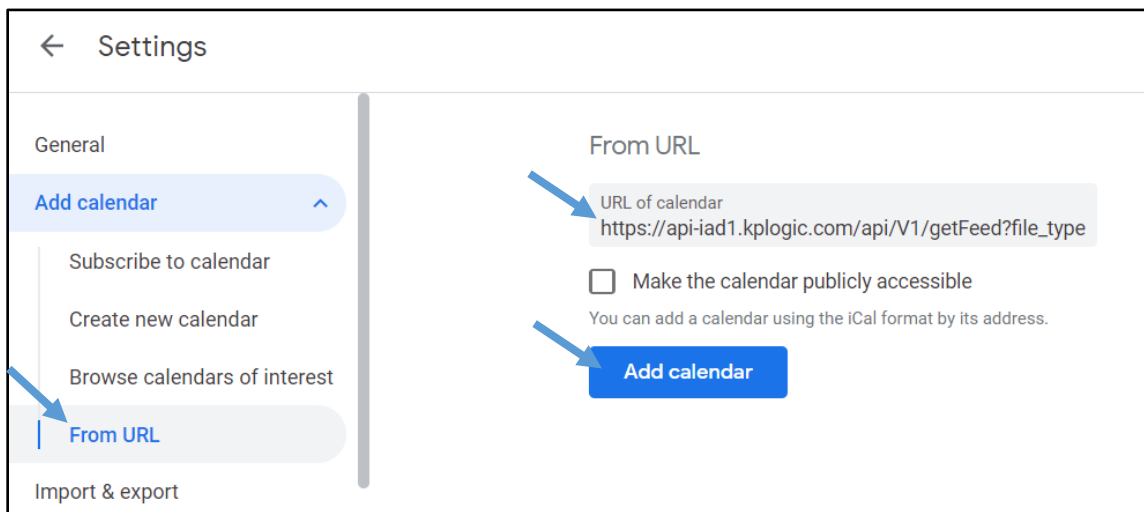
Touch and drag the  
screen down a little.

## Google Calendar Feed

- Email the desired feed URL to yourself.
- When the email arrives, copy the feed URL.
- Select the "+" beside *Other calendars*
- Select



- Select **From URL**
- Paste the feed URL into the *URL* box.
- Select **Add Calendar**.

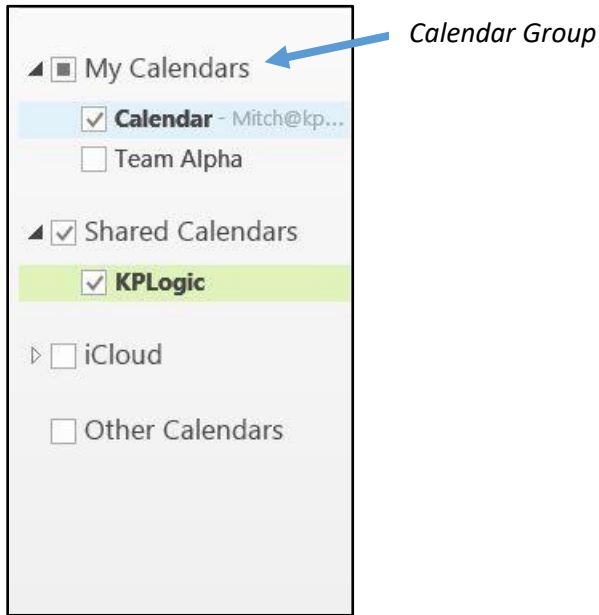


You can now view the feed on your Google Calendar.

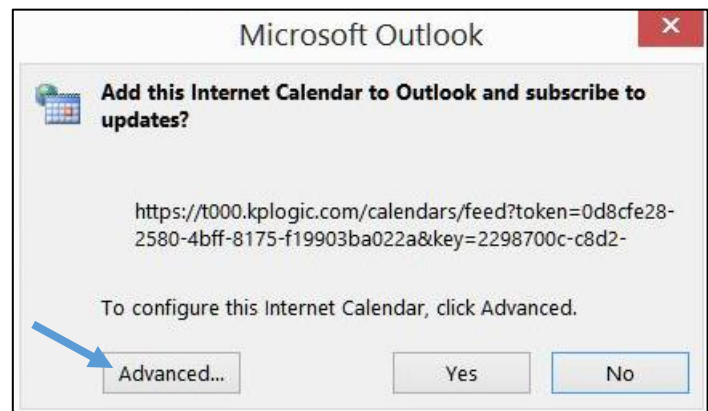
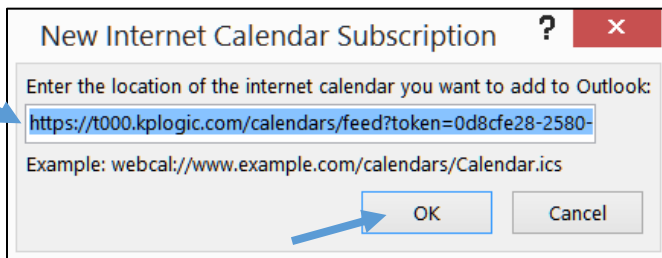
Google automatically refreshes the feed approximately once each day. We have no control over this timing.

## Outlook Calendar Feed

- Email the desired feed URL to your Outlook email address.
- When the email arrives, copy the feed URL.
- Right Click on a *Calendar Group* and select: **Add Calendar, From Internet.**



- Paste the URL into the box and select **OK**.
- Once the dialog box appears, select **Advanced** to go to the *Subscription Options* screen.



- Beside *Folder Name*, give your feed a name (e.g. Team Alpha)
- Uncheck the box under *Update Limit*.
  - This configures the calendar so that the user can refresh the feed on demand by selecting **Send/Receive All Folders** from the *SEND / RECEIVE* tab.
- Select **OK**.

Subscription Options

Use the choices below to configure options for this Internet Calendar.

**General**

Folder Name: Team Alpha - all

Internet Calendar:

Location: https://t000.kplogics.com/calendars/feed?token=0d8cfe28-2580-4bff-8175-f19903ba022a&key=2298700c-c8d2-480e-91b1-36d4002811f6&team=1

Description:

Display this calendar on other computers with the account: mitch@kplogics.com

**Attachments**

Download attachments for items in this Internet Calendar

**Update Limit**

Update this subscription with the publisher's recommendation. Send/Receive groups do not update more frequently than the recommended limit to prevent your subscription from possibly being cancelled by the content provider.

Current provider limit: Use the choices below to configure options for this Internet Calendar.

OK Cancel

To return to the Subscription Options screen do the follow:

- From the *File* tab, select **Account Settings, Account Settings**
- From the *Internet Calendars* tab, select the desired calendar feed
- Select **Change**

## Appendix B: YouTube training video timestamps:

A video training brief can be found at: [https://youtu.be/9x4\\_TuP2oDs](https://youtu.be/9x4_TuP2oDs)

- 0:00 – Introduction and App Download Link
- 0:29 – Logging In
- 0:54 – Cases/Case Schedule Screen
- 2:00 – Adding a New Case
- 2:57 – Case Details Screen
- 4:13 – Requesting Sets on a Case
- 5:24 – Aggregate Tool
- 5:45 – Submitting Consumed Products to the Office
- 7:00 – Scan Products Example
- 7:51 – VELYS Tracking
- 8:17 – Price Sheet and Billing Details
- 9:18 – Sales Metrics
- 9:52 – Billing Features
- 10:23 – Reports
- 10:47 – Inventory
- 11:43 – Office Inventory
- 12:27 – Consignment Inventory
- 13:05 – Scanning Inventory/Cycle Counts
- 13:40 – Backorders
- 14:34 – Shipment Tracking
- 15:07 – Device Experience Reports (DERs)
- 15:55 – Preferences
- 16:42 – Notifications
- 17:08 – Questions/Contact Us