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MORPH BUSINESS PROCEDURES

This document covers standard business operations for practices under the Morph Provider Network.

 **MORPH
PROVIDER
NETWORK**

770-243-5753 

www.morphwellnessmd.com 

@morphwellnessmd 



ABOUT MORPH

The Morph Provider Network is a new-aged telemedicine health and wellness network that works with patients to develop customized prescription treatment plans in their specific areas of need such as weight management, peptide therapy, testosterone therapy, hormone therapy, sexual wellness, and hair restoration.

MORPH MISSION

By providing an elite patient experience with our board-certified physicians and practitioners, delivering the highest quality research-based medicine, and striving to focus on preventative health and total wellness, at Morph, our mission is to guide you in your own metamorphosis, as you achieve the ultimate results you desire.

MORPH STANDARDS

- Elite patient care and customer service
- High-quality compounded medications
- Customized treatment plans
- Telemedicine consults from the comfort of your home
- Prescriptions delivered to your door
- Board-certified physicians and practitioners





Weight Management

- Weight loss and weight maintenance prescription medications, as well as options to increase overall body composition.

Peptide Therapy

- Boost overall wellness through your body's natural hormone production providing rejuvenation, increased strength and energy, cognitive and mood improvement, healing and immunity, and better sleep.

Testosterone Therapy

- Peak your performance through natural and synthetic supplementation, resulting in maximum changes in your hormone levels with superior results.

Hormone Therapy

- Female bioidentical hormone replacement therapy that provides treatments specific to the symptoms of menopause from hot flashes and loss of energy to slowed metabolism and mood swings.

Sexual Wellness

- Peak your performance through natural and synthetic supplementation, resulting in maximum changes in your hormone levels with superior results.

Hair Restoration

- Hair restoration targeted to treat male pattern hair loss, COVID induced hair loss, and thinning hair in both males and females by increasing the number and thickness of hair follicles.

Concierge Medicine

- Exclusive personalized care of acute and chronic illness with a relationship between you and your doctor, along with accessibility and convenience of appointments, either Virtual or In-Home



PROVIDER TO PATIENT CONDUCT



- Please try to respond to patient messages within 24 hours. If an office admin sees unanswered patient questions or order requests after 24 hours we will page you to remind you to get back to them. If messages go unanswered for another 24 hours or any extended circumstance, Dr. Lawrence will be paged to step in for patient care. Potential loss of the patient may occur. Exceptions for holidays and leave.
- Patient discounts, refunds, comped shipping, or anything outside of our standard offerings must be approved by the administration. Do not promise this verbally or written without prior approval.
- Morph communication should only be made through Spruce. If you have personal friends, family, or any other patient using your regular number for Morph business, please direct them to use our office number instead. That way, the office admin can easily contact your patients and access conversation history for order tracking.

PERScription PROCESSING TIMELINE



- Once you have entered the medication order into Airtable, the time to delivery is as follows:

24 Hours for billing to charge the medication



24 Hours for the RX team to enter the script into the pharmacy



Shipping from the pharmacy should be within 7-10 business days. Sometimes it is faster or slower depending on pharmacy capacity and allowances for holidays.

**Times based on input time in airtable, exceptions to designated holidays and weekends and within office hours*



PATIENT LAB ORDER PROCEDURES



- Valan will enter your patient's lab order once it has been marked "Paid" in the system.
 - You can check on the patient's lab order payment status in your labs view in Airtable.
- When it has been entered and labs complete, please let them know their order is ready to be collected. They can visit their closest LabCorp facility and give their name and birthday to pull the order.
- Results can take a few days to process, but once we get the results back our lab assistant will pull them, upload them into their Boulevard patient chart, and page you that they are ready for review with the patient.
- For patients who need routine lab check-ins, you can schedule a "ghost" "lab reminder appointment" in your off-hours in the Boulevard calendar view 3 or 6 months out. Remember to uncheck the "notify client" box before confirming the appointment. That way you can have set reminders close to their due date to reach out and set up another lab panel for the patient.



LAB PANELS



- **LBBMP** - Basic Male Testosterone Lab Panel (Testosterone, SHBG, Estradiol, Free/Direct Testosterone, CMP, CBC)
- **LBBFP** - Basic Female Testosterone Lab Panel (Testosterone, SHBG, Estradiol, Free/Direct Testosterone, CMP, CBC, Progesterone)
- **LBAMP** - Advanced Male Testosterone Lab Panel (Basic + PSA, Cortisol, Prolactin, T4 & TSH, T3, FSH & LH)
- **LBAFP** - Advanced Female Testosterone Lab Panel (Basic + Cortisol, Prolactin, T4 & TSH, T3, FSH & LH)
- **LBPLS** - Lab Plus Panel (M/F Advanced+ HgbA1C, Lipid Panel, Vitamin D, Vitamin B12)
- **LBMAX** - LabMax Panel (Lab Plus Panel +IGF)

LAB ADD-ON



Lab add-ons are only purchased in addition to a base lab panel, and cannot be ordered individually without prior approval. Note approval in billing notes if received.

- **LBIGF** - IGF Add On
- **LBINS** - Insulin Add On
- **LBLPP** - Lipid Panel Add On
- **LBPSA** - PSA Lab Add On
- **LBDHA** - DHA Add On
- **LBFER** - Ferritin Add On
- **LBIRN** - IRON with TIBC Add On
- **LBTHY** - Thyroid (Free T3, T4, TSH) Add On
- **LBABR** - AB/Rho Add On



DISCOUNT CODES AND SALES



- Admin announces all sales to providers and on our social media accounts.
- Our standard sales are Back-To-School, Black Friday, and New Years.
- Orders placed within the dates of the sale will be honored, even if not billed before the period is up, however, a patient cannot request to use a sale code after the period is over.
- Sales cannot be applied on top of discount codes, and you cannot stack discount codes (IE. birthday on top of the first responder discount)
- Exclusion on certain products and services apply- labs, shipping charges, and any other additions noted by admin. at the start of the sale

PATIENT-FACING DISCOUNT CODES



- **FRESP-** First responder (fire, police, EMT) = \$30
- **HPBDY-** Birthday (can be used 30 days before and after DOB) = \$25
- **MORPH100-** Morph your friends (10 referrals) = \$100
- **MORPH50-** Morph your friends (5 referrals) = \$50
- **MLTRY-** Military = 10%
- **DUOMORPH-** Couples who order at the same time = \$25 off each



SHIPPING PROCEDURES



- Patients can choose to add a \$40 **RUSH** shipping fee to their order, which will put it through the pharmacy queue faster.
 - *Exclusions may apply on certain medications and at certain times in the year depending on pharmacy capacity. Not applicable on all medications or pharmacies.*
- If a patient lives in a state that the pharmacy their medications are coming from doesn't ship directly to, their package will need to be sent to our office first and the patient must have a \$30 SHIPS charge added to their order. There is no way to avoid the \$30 fee for shipping charges.
 - PACKSHIP is a one time shipping fee that applies to any package shipped from our office.
- Make sure to note if the patient has a different shipping than their originally entered address, and copy any address changes on their order in Airtable as well in Boulevard. You can page office admin with updates if you are wanting extra assurance that the change has been noted.
- Please note that all the pharmacies have different shipping restrictions, so please refer to the Shipping Airtable to see the states the pharmacy in question for each order to determine if it needs SHIPS added.



PACKAGE PROCEDURES



- Tirzepatide and Semaglutide packages are exempt from discount codes and sales, and cannot be rushed unless given approval by office admin.
- Packages are billed automatically each month for the duration of their term. Payments are made each month on the day the package was originally ordered.
- We cannot use CareCredit to finance packages.
- TRZ packages ONE, THREE, SIX-NINE, and YEARLY package plans ordered for patients with SHIPS must be tagged with PACKSHIP.
- Refer to the RX airtable for details on package duration, dosing, and whether or not the patient will receive all the medication upfront or in installments, as packages are set up differently.
- If packages are purchased upfront, the medication will be shipped all upfront. A shipping note must be made by the provider in order to alert the Rx Input team of this adjustment.



NO-SHOW PROCEDURE



- Check your patient's form status in Boulevard prior to their consultation. If they are marked with a Red Dot on their appointment, it means their forms are incomplete. The office will have messaged them, prompting them to fill out the forms, but please send a short text before your appointment reminding them they will need forms on file before their consultation. Without all forms on file, we cannot order medications for them.
- Attempt to call your patient at the scheduled appointment time. If the patient fails to answer, please leave a message with your name and Morph Health and Wellness stating the reason for your call.
- Call one more time within 5 minutes, no voicemail needed. If the patient fails to answer the second time, please send the saved message in Spruce labeled "NO- SHOW TEXT". Please page the Office Manager with "NO-SHOW" and we will then monitor the situation and handle the situation accordingly.
- Please note that patients will not be immediately charged the no-show fee, we will give them grace and understanding. They will have a few hours to respond to reschedule. If they have been charged a no-show fee and then respond and would like to reschedule, they may do so one time and use the \$100.00 towards their purchase. If they no-show a second time, they will be charged another \$100.00 immediately and will no longer be accepted as a patient at Morph.





Ground Rules

- Do not edit the views or configurations on Airtable
- You cannot put in your own RX's into the pharmacies
- If a patient does not have their forms filled out completely, we cannot process their order, and it will be moved to a HOLD status until form completion.

Billing VS. Shipping Notes

- If a client has a specific shipping request, like a temporary address, or a specific time-window they need it in, you must add that in the **shipping notes**.
- If a client needs their order billed on a certain card, or on a certain date, that must be added in **billing notes**.

SHIPS vs. PACKSHIP vs. RUSH

- SHIPS tags must be added for any order that has to come to our office first. \$30 fee.
- TRZ packages ONE, THREE, SIX-NINE, and YEARLY package plans ordered for patients with SHIPS must be tagged with PACKSHIP which is \$45.
- RUSH tags can be added for orders that patients want to be expedited from the pharmacy. \$40 fee.

Paging Rules

- If there is a special note you need attention to on an order, or an issue that has come up with an order, please page the appropriate admin in SPRUCE, not Airtable. This centralizes communication on each patient's text thread for all team members to follow.

Refill Reminder Dates

- When you enter a prescription, make sure to enter the reminder date two weeks before your patient's medication is set to run out based on their dosing routine. Our team will send a reminder on that date, prompting them to re-order on time if desired.



AIRTABLE STATUS CODES



Refer to the codes below when setting your patients order statuses:

- **Ready to Be Charged:** Order ready to be billed, with all forms, cards, and DL on file.
- **Paid: Order** - Order billed and ready to send to pharmacy
- **HOLD** - Order on HOLD status, do not bill.
- **Sent to Pharmacy**- Order has been sent to the pharmacy.
- **Card Declined**- Attempted Billing, card action needed.
- **Card Expired**- Old card on file. New card is needed.
- **No Card on File** - Need card on profile for billing.
- **Future Order- Hold** - Order on hold for shipping; has not been billed.
- **Future Order- Paid**- Order on hold for shipping, but has been billed.
- **Influencer** - Notes influencer Status for office record. No billing.
- **Package- PAID**- Package initial payment made and set up.
- **Package- NEEDS ATTENTION**- Heads up for special circumstances.
- **Package- CHARGE**- Ready to set up monthly payments on the package.
- **Package- IN PROGRESS**- Package payment is ongoing. We still owe patients monthly shipped meds.
- **Package- COMPLETE**- Package plan terms finished and closed out with all meds delivered.
- **Care Credit**- The patient is using care credit to pay for the order.
- **Signature Pending for Care Credit**- Agreement form has been sent to the patient to sign. Bill upon signature completion.
- **Labs Complete- Admin Only**- Results have come in and have been sent to the patient 'schart.





Morph Provider Network Refund Policy

- Due to the nature of individualized treatment plans and prescriptions being compounded specifically for each patient, prescription medications are non-refundable. A refund will only be issued, if there has been an error in payment processing, in which an overpayment has been identified. We do however, believe in our products and the results provided. If you feel there has been an issue that needs to be addressed, please contact our office and we will be happy to discuss each transaction individually as it applies to our Prescription Order Policy.

Morph Provider Network Prescription Order Policy

- We do not offer refunds on prescription medications, as they are specifically and individually compounded for each patient. By agreeing to an order or refill through communication with your individual provider, we have the permission to process your payment and order the prescription you and your provider have previously discussed. If there is any issue with your order or prescription, you will have 24 hours after the time your payment has been processed to request a cancellation of your order, or a change of prescription request can be submitted to our office and your provider. A cancellation or change of prescription request is subject to approval by MPG. A Cancellation of Prescription Change Fee of \$125.00 may be required, and is subject to the processing of the prescription and MPG.



PAYROLL GUIDELINES



- Pay periods will generally be 4 weeks long, ending on a Friday. Some exceptions apply to accommodate for holidays. An official pay calendar will be released for each calendar year.
- A credit balance is added to your patient profile each month and that the credit is to be used first for personal orders and then the percentage discount applies to additional medication.
- Paydays will occur on the Friday after the pay period has ended. Prescription counts are run on an analytics report from the billing cycle, which is processed accordingly to your Rx List.
- You will receive payments via direct deposit through Square payroll.
- A 1099-NEC will be sent out to you in January of the following year.

See the following section on prescription credits for more information

If there are ever any questions or discrepancies regarding your pay, please contact Caitlin at 770-480-3655.



PERScription CREDITS



- Active patients are determined by your prescribing patient list in your Rx List. Each patient will count one time for the patient count, and each prescription written will be referred to as a "prescription credit".
- If you sell a pre-paid bundle or a prescription that is dosed greater than a 4-week period, you will be paid for the prescription credits during the pay period in which the payment was received.
- You will not receive prescription credit for refunded transactions, lab work, injection supplies, shipping charges, or Zofran, as the charge is the wholesale cost of the prescription, and this is just an added service for patients and the convenience of having the medication shipped to them.
- All family members are allowed to be counted in your prescription credits.
- EMFAM10 is a discount for EXOSOMES. Must use EMFAM10 for discounts on regenerative products
- Each provider (PA or NP) will be considered a patient of Dr. Lawrence or Dr. Bennett. Providers will not receive prescription credit for other providers, or themselves.
- You will be paid at those rates based on the number of prescriptions, as outlined in each individual contract.



PERScription CREDITS CONT.



Below are the medication codes that have special allotments for credit count:

TRZ 40= 1 Credit

TRZ 80= 2 Credits

TRZ 120= 3 Credits

TRZ 160= 4 Credits

PACKAGE PAYment credits: Packages will be paid out in increments set below as the payments are processed each month.

TRZONE= \$12

TRZTWO= \$12

TRZTHREE= \$17

TRZFOUR= \$17

TRZFIVE= \$10

TRZSIX-NINE= \$35

SMGONE= \$7

SMGTWO= \$17



**What pharmacies do you work with and source your medications from?**

- We source our medications from compound pharmacies that are top in their industry and are both FDA and USP-accredited facilities. The pharmacies use only FDA approved raw and pure materials for compounding that are triple-tested for safety and sterility during preparation

Do you prescribe Mounjaro? Ozempic? Wegovy? Retatrutide?

- We prescribe compounded versions; Semaglutide, Tirzepatide, and G3. Semaglutide is the active ingredient in Ozempic and Wegovy. Tirzepatide is the active ingredient in Mounjaro.
- We are not allowed to explicitly confirm that G3 is Retatrutide. If a patient asks, you may explain on a call, but just say G3 is the third generation of GLP-1s over text.

My package came in a cooler, but it is no longer cold or the package is now hot, the ice has melted, etc. Can I still use my medicine?

- Yes, you may still use your medication. Medications are shipped in refrigerated packaging in order to help maintain the molecular stability of the medication. If the medication has been outside for more than 24 hours unrefrigerated, we do recommend that you remove the medication from the cooler, place it in the refrigerator for another 24 hours prior to using. Please note that the efficacy of these medications have been tested in temperatures up to 86 degrees and are safe to use if they have been unrefrigerated for up to 21 days. If for any reason, you feel that your package has been exposed to these extremities, then please let us know and we will be glad to see what we can do to take care of that.

I ordered multiple medications, but only received half of my order. Why?

- If you have ordered multiple medications, they may have been sourced from different pharmacies and can have different production times, meaning that there is a chance they ship separately.





There is only a tiny amount of liquid in this vial- there is no way this is going to last X amount of weeks. I ordered 40mg of Tirzepatide, I only received 10mg. Are you sure this is correct?

- Yes! The medication is concentrated, so you only take a very small amount of liquid in each injection dose. There is enough medication in the vial to last the prescribed duration as discussed in your consultation.
- Example: Tirzepatide 40mg (Concentration 10mg/0.5mL in a 2mL Vial) Explain that each 0.5mL contains 10mg, and there are 2mL total in the vial. So 4 x 0.5mLs means that 0.5mL contains 10mg, 1mL contains 20mg, 1.5mL contains 30mg, and 2mL contains 40mg.

How much do I inject on the syringe?

- 25 units is equal to 0.25mL
- 50 units is equal to 0.5mL
 - Seeing the client-facing dosing guidelines PDF [HERE](#)

I was cut short on medicine and unable to get a full dose of my injection and there wasn't any medicine left in the vial.

- TIP: You can use a bottle opener to remove the silver safety ring on the top of the vial once you have reached the end of the medication to draw up the last bit of liquid in the bottom of the vial. Patients usually report being able to get about another 10 units of medication out this way. *This is probably only necessary for your last injection.
- See link below for a video explaining how to remove:
 - <https://www.instagram.com/reel/CvG Tk48gpCI/?igsh=MzRlODBiNWFlZA==>

Where is my order?

- Once your medication has shipped, you will receive tracking information from our office number via text. Please note shipping times may take up to 10 business days before shipping.



MORPH ORGANIZATION CHART

Morph Founders

Dr. David and Caitlin Lawrence

Operations Manager

Kayla Nielsen

Office Manager

Avery Rudd

Pharmacy Relations

Cory Smith

Office Assistant

Lindsey Bellamy

Patient Care Coordinator

Jenna Morales

Billing Manager

Lynn George

Quality Control

Dave Lawrence

Shipping Manager

Abby Knight

Systems Assistant

Taylor Lowrey

RX Input

Valan Kennedy

Providers

Dr. Bennett, Jamie Blackwell, Adrienne Branch, Candis Daugherty, Dr. Lawrence, Rachel Lebolo, Gabe Mlozdik, Victoria Murias, Heather Tillery, Kaylee Whalen, Ellie Burris, Haley Bruce, and Ashley Hudson



ISSUE ESCALATION PROCESS



Question about a business policy?

Refer to the Morph procedural handbook!



Question about billing for a patient order?

Please page your assigned billing officer!

LYNN GEORGE

Dr. Lawrence, Rachel,
Heather, Victoria, Kaylee

LINDSEY BELLAMY

Dr. Bennett, Jaimie, Gabe,
Morgan, Adrienne, Candis, Haley



Question about a patients medication at the pharmacy?

Please page Cory or Valan for assistance!



Need assistance for issues dealing with patient information (forms, cards, driver's license, appointment scheduling, etc.?)

Page Jenna for assistance!



Still need assistance after consulting the appropriate channel, or were you passed an issue from someone else and need clarification?

Page Avery! Avery will assist, and if the issue needs further review, she will contact Kayla, who will contact Caitlin if needed.



Please do your best to follow the appropriate issue escalation process so we can keep the workflow as smooth and streamlined as possible.

CONTACT

Dr. David Lawrence, Founder, CMO

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- Email: drlawrence@morphwellnessmd.com

Caitlin Lawrence, COO

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Kayla Nielsen, Operations Manager

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Avery Rudd, Office Manager

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www.morphwellnessmd.com

IG: [@morphwellnessmd](https://www.instagram.com/morphwellnessmd)

TikTok: [@morphwellnessmd](https://www.tiktok.com/@morphwellnessmd)

Hours

- Monday -Thursday 8am to 5pm
- Friday 8am to 3pm
- Saturday and Sunday By Request Only
Providers offer evening and weekend appointments

