INTERNAL: ePS and DrChrono onboarding workflow

07/24/2024 6:05 pm EDT

DRC-Onboarding/Implementation (Netsuite Customers)

Onboarding	Kick Off Call	Payer Preparation	Starting Agreements	Enrollment Cadence

❏ Customer completes onboarding packet
  ❏ Goals
  ❏ Payer List
  ❏ Major Payers(used the most)
 	
Differentiate between Apollo and Apollo + customers
	❏ Review payer list Verify customer information
	❏ Enroll customer to ePS
		❏ DRC Team will create customer in provision
		
		❏ IS(Implementation Specialist) files a ticket in Zendesk with the payer list(ePS enrollment request Macro)
			❏ CC Customer contact in the ticket for payer agreement activities
			
			❏ Customer fills it out and adds to Zendesk tickets for processing
				❏ Time when agreements are processed
				
				❏ Status Updates communicated to the implementation team(weekly)