

## **User Journey of Project: Intrustpit - Lead Management System (Linda)**

Vendors provide the information of the customers/clients to Trusted Surplus Company. The operation team of Trusted Surplus contacts the customer/client to gather required information and record the information in the system as well in Authorized Forms. The customers/clients can be either the patient themselves or a relative of the patient.

User navigates to the "Lead" tab on the website and selects the "Add Lead" option.

User enters and stores the contact information of the person he is communicating with, including first name, last name, phone number, email, Relationship to Patient (A dropdown from where user can select the relationship with the Patient). The user also enters and stores patient information if applicable, such as the patient's first name, last name, phone number, and email etc. This patient is the one who will be registered as a customer in the billing system. Then other information is stored that includes Interested In (To type in what services the customer/client needs from us), Sub- Status (it always remain "opened"), Assign To (for adding the name of coordinator/intake whom the customer/lead is assigned), Case Type (a dropdown to add the case type like single, mutual, Vendor Change), Note (to write any additional note), Tags (tags are not needed). Then Source Information is stored. This section "Source Information" is very important because this helps to determine that this particular client whose information is being stored has been provided by which vendor. Source Information includes Source Type (let's say Account). Account/Contact (let's say EHCS-PIT, this is the vendor, he would like to see the progress of what is happening at our end and the progress of people who are being sent to us by him), follow-up Date, follow-up time, follow-up note.

The Lead is converted to a referral by clicking the "Convert to Referral" button, which redirects the user to the "Referral" tab within the "Add New Referral" section.

Within the "Referral" tab, the user adds further details about the Lead, including his first name, middle name, last name, email, email 2, language, gender, medical number, medical plan, country, address, APT/SUITE, zip code/postal code, city, state, phone number, patient SSN, and Emergency contacts. In Emergency Contacts there is an additional option "Copy from Lead", it allows the user to copy the personal information like First Name, Last Name, Phone, Email Address from the Lead. Now on bottom there are further details to be added like follow up date, follow up time, follow up note, Projected Admission Date (it's not needed), Case Potential (it's not needed), Marketer (it's not needed), Intake Coordinator (a dropdown to select the name of intake coordinator)

After providing the necessary information, the user saves the referral by clicking the "Save" button.

A screen displaying the Lead's information like first name, last name, Intake Status, Marketer (it's not needed), Intake Coordinator, Project Admission Date (it's not needed), Case Potential (it's not needed), Case Type, Lead Source. All these details are editable, like these details can be changed on this screen as well. Now if the user goes down on this page there is an editable option of Service Status. There are three types of statuses. First is "Open" and "open" status has further options like "Not Contacted", "contacted but info not sent", "In Progress". Second option in the popup of Service Status is "Admitted" and third is "closed". If "closed" is selected in the service status then another dropdown shows in this pop up which is named "Lost reason". In this dropdown there are options to select the reason like "no longer interested", "Unresponsive", "using other companies' ", "out of state " and "other ". So, the user has spoken to the person, he has recorded the information. The information is added to the system. There is now option on this same screen to add the Notes. Inside this option, the user can Add the Note with the Subject and the description. On the right side of the same screen there is the option of the Follow Up. This feature allows the user to add the "Follow Up Date", "Follow Up Time", "Follow Up Note" This date and time get added to the calendar of the user, so the user may get reminded to take the Follow Up. Under the Follow Up feature there is "Created Date" option. It shows the name who created (means the user), the follow up date and the time. Other coordinators also have the ability to see this date and time in the calendar.

On the extreme left side of the same page there are additional features such as service, patient, task (it's not needed) SMS (This has the ability for the user to message the person. User wants to send the text message so he uses this feature and the message gets sent directly to the phone of the user), Medicaid, and Physician.

The next step involves preparing documents containing the Lead's information and sending them to the Lead for e-signature. The user navigates to the "Service" tab.

Inside the "Service" tab, the user selects the "E sign and document" option, which displays a list of all the documents available. All the information of the client/customers gets stored in the forms respectively.

The user chooses the relevant form and sends the form's link to the customer/client's email or phone for e-signature or sends the form via email.

The client/customer can either sign the form and send it back via email or use the provided link to sign the document electronically. Link is sent to the client's email or phone by the user from the same screen inside the option of "e-Sign". If the client/customer signs the document electronically using the link, the system automatically changes the status of the document to "Completed" within the "E Sign" section. Now the user can track the status of each form if it's completed or not. In the same section there is an option in the "Action" that allows the user to go on the admin side and sign the form on the behalf of the company.

Then the user downloads the signed form and uploads it to the system by navigating to the "Document" section within the "E sign and document" option once the forms are "completed". There are a total 7 forms that need to be completed and uploaded in this section respectively. All the uploaded forms are listed here. At the end of the list of all the forms there is "voided check". However, there is no form for the voided check. User needs this tab because the user needs the copy of the voided check as the user debits the money from the account of the customer/client.

Then the user proceeds to the "Checklist" option within the "E sign and document" section, where a checklist of all the required documents is displayed. The user marks all the documents received from the client in the checklist. To charge the Lead, the user enters the finance/bank details of the client by navigating to the "Finance" option within the "E sign and document" section. It has all the information about the billing part. It has the enrollment page that further has some input fields and those are: Enrollment Date, Enrollment fee status, Paid, Waived, Split, Enrollment fee, Surplus amount, Monthly maintenance fee (Its 10% of Surplus but Never less than 30 and never over than 250). So, this must be editable. Then Bank Info: Account Type (Checking, Saving), Bank name, Routing ABA, Account Number, Recurring Payment Info (not needed because this is something client needs to fill), does this client have a recurring bill? (Yes, No), Was this Client issued a Credit Card? (Yes, No)

Then the user adds information about the physician in the "Physician" Tab It is used to put the Doctor's information: Physician Name, Phone Number, Physician Address, Name of Practice, NPI Number, Fax number, Email. The information about the doctor also goes in forms.

Then the user goes to the "Medicaid" option to store information like does the client currently have active Medicaid? Medicare Number, Codes, Medicaid plan, Medicare Number, Medicare Type. This is just the insurance information but this is the important part.

At this point, the major user journey is completed, including the creation of a new Lead in the system, obtaining the Lead's signature on every document, completing the necessary formalities, and storing the financial information.

### **The platform also offers additional features:**

**Accounts Tab:** It gives the ability to add the vendors. It is used to add all the Vendors with the information: Account Name, Phone, Email, Address. Vendors can be added, and a list of all vendors is displayed.

**Contacts Tab:** Case workers associated with the vendor or company can be added, and a list of all contacts is displayed. The need of this tab is because the user needs to add the case workers respective of the vendor/company who they work with.

**Referral Tab:** A list of all cases is available, with options to filter and sort the information. It provides details such as pending and completed cases, vendor sources, associated case workers, and more. Every customer must have a referral number. If a vendor wants to see all of his cases provided by him to the Trusted Surplus company then in this referral tab, the user can search for the vendor name and it shows list of all the cases associated with him and all details like : ID, Full Name, Referral Type (old, new), Intake Status (it's always "open"), Patient Status (Pending, Closed, Lost, Admitted), Lead Source, Tags (not needed), Open Services, Last Modified by & Date (It gives the name a coordinator who last time made some changes), Follow-Up Date (Gives the Alert about the Due Date, it has the sorting filter), Follow Up Note of the cases are also displayed. The user downloads the report and sends it to the vendor via email. Every time when a vendor needs information, he sends an email to the Trusted Surplus Company and the user sends the required report to the vendor by downloading it from the system. The reports can be generated on the basis of filters like status (pending, completed, admitted), Intake Coordinator, Users (Related to me, All), Lead source (vendors).

**Settings Tab:** Options are available to make changes to roles, users, and case types. In this Tab user needs to have the ability to add and change things in Dropdowns, Integration, Lead, Notifications, Providers, Referral, Report, ROI, Tags, Task Types, Templates, User & Roles. In "User & Roles" there are three more options: "Agency Roles", "Guest Roles" (Linda does not know about this) and "Users". Inside the "Agency Roles" there's "Agency Role Name", "System Role Name" and "Actions". In Actions there are certain functions the user can perform like deleting the Role, or alter the role of any user, changing the Agency Role name from agency to marketer but marketer is not used by the user so it's agency, viewer, admin or intake most of the time. Lastly inside the "User" there is a list of users and the information of each user like ID, Name, Phone, Email, Role, Supervisor, Created By, Last Login At, Status, Actions. Each row in

this list is clickable to edit users like his Role (Viewer, marketer, intake, admin), First Name, Last Name, Email, Phone, Mobile Phone, Department, Job Title, Supervisor.

**Report Tab:** It is very important for the User. It has the list of all the reports saved by the user. The report is saved with the information: Report Name, Object, Email Frequency, Type, created by, updated by, action. When a user clicks on any of the reports a new page is displayed that shows the report. For example if a user opens the report of the "Marks home care" it shows sheet with information like: Lead Source Type, Account Name (marks home care), Referral ID, Referral Service Status(Open, closed admitted), Referral patient full name, Referral patient ID, Referral Intake Status, Referral Patient Status, Monthly Maintenance fee. Depending on the vendors the user creates the report. For example, another report that shows Referral Patient Status (Admitted, Lost Pending) and columns of each month and last column of Total count of Referral ID, with last row of Grand Total. This report tells the information like how many clients are lost or converted and the total fee of those clients and grand total of each month.