**Myriad Onboarding process**

Myriad onboarding process serves the objective to give directions on how to execute a process that will facilitate a comprehensive yet simple onboarding for our respectable clients.

**How to get started?**

* A demo will be scheduled by our sales associate whenever the contracting party (Client) requests an appointment.
* Our sales associate will complete the demo, after which they will assist you in filling out a questionnaire.
* Once we're done with the questionnaire, we'll finalize the application agreement, the software agreement, the subscription model, the commercial invoice, and the founder's assurance before delivering them via DocuSign to the client for signature.
* We will submit documents to Elavon for authorization after the client has acknowledged them.
* We will ship out the appropriate equipment so it arrives in time for the setup once we're granted permission from Elavon. This is documented on a shipment spreadsheet with all the required attributes for monitoring and tracking purposes.

**Our Act of Assistance:**

* We will begin setting up the client's Myriad health account, including its users and billing details. We will ensure that we have all the data required for E-Prescribe (if mandatory), Claims.MD, billing, etc.
* This stage will be followed by the creation of customized forms and layouts as well as the insertion of CPT codes and a schedule of payments to the client's account.
* Our Billing Staff will establish an account on Claim.MD and begin enrolling clients with the insurance providers that their service accepts (Within Network or out of Network). They can further assist the client to ensure proper completion of credentialing with the insurance provider.
* We will examine the previous procedures for accuracy prior to providing real-time or recorded training. Any updates and new features will be recorded.
* The customer will have immediate access to support after the live launch date is confirmed.

**Tasks assigned and their specialists**

* Myriad Software Demo (Sales Rep)
* Questionnaire (Sales Associate & Client)
* Set Installation Date & Advisory by Christine (Sales Rep)
* Agreement (Client)
* Forwarding to Elavon (Kristina & get approval)
* Sending Converged Credentials & advisory by Christine (Kristina)
* Sending Equipment & Logging information in spreadsheets (Bridgette)
* Creating E-Prescribe Account (Andrey)
* Provider Name and NPI (Sales Rep)
* Provider Name and DEA/PTAN (Sales Rep)
* Create Twilio # and adding it to Myriad account (Christine)
* Creating Custom Forms (Leticia)
* Upload CPT Codes/Schedule of Fee’s (Leticia)
* Obtaining CSV from Client (Sales Rep)
* Uploading CSV to Myriad account (Bo)
* Verifying upload to Myriad (Bo)
* Converged Credentials adding them to account (Bo)
* Adding terminals to Mryiad account (Bo)

* Establishing Myriad account and setting up users (Christine)
* Process Insurance enrollments in Claim MD (Ciara)
* Email complete client insurance details (Ciara)
* Billing Team audits (Ciara & David)
* Providing training (Live/ recorded videos)- (David)
* Updating required Documents (Christine & David)
* Confirming the launch date or making changes if any (Sales Associate & David)

**MYRIAD INSTALL CHECKLIST**

1. A. DBA / MERCHANT NAME
2. B. IN PERSON OR REMOTE MEETING (REP)
3. C. INSTALL DATE – \_DATE & TIME (REP)
4. D. SUBMIT PROCESSING AGREEMENT TO ELAVON (CHRISTINE & KRISTINA)
5. E. PAPERWORK SIGNED BY CLIENT
6. F. SEND IN FORM TO APPROVE CREDENTIALS (KRISTINA)
7. G. SEND OUT EQUIPMENT / SHIPPING DETAILS (BRIDGETTE)
8. H. EQUIPMENT TYPE & SERIAL NUMBER (BRIDGETTE)
9. I. CREATE MYRIAD ACCOUNT & USERS (CHRISTINE)
10. J. CREATE ACCOUNT IN CLAIM MD (CHRISTINE)
11. K. EMAIL CLIENT DAY BEFORE INSURANCE ENROLLMENT (CHRISTINE)
12. L. ENROLL INSURANCES (CHRISTINE)
13. M. EMAIL CLIENT AFTER WE ENROLL INSURANCES (CHRISTINE)
14. N. CREATE E-SCRIPT ACCOUNT (ANDREY)
15. O. PROVIDER NAME & NPI NUMBER (CHRISTINE)
16. P. PROVIDER DEA NUMBER (CHRISTINE)
17. Q. SURESCRIPTS PROVIDER ID NUMBER (JEREMY)
18. R. CREATE TWILIO PHONE NUMBER & ADD INTO MYRIAD ACCOUNT (CHRISTINE)
19. S. CREATE CUSTOM FORMS/TEMPLATES (LETICIA)
20. T. UPLOAD CSV FILE OF DEMOGRAPHICS (JEREMY)
21. U. UPLOAD CPT CODES/SCHEDULE OF FEE’S (LETICIA)
22. V. TEST ACCOUNT AS A NEW PATIENT (JEREMY)
23. W. REVIEW PATIENT PROCESSING (JEREMY)
24. X. CREATE PHASE SHEET (CHRISTINE & KRISTINA)
25. Y. TRAINING & INSTALL (JEREMY & REP)
26. Z. CUSTOMIZATION REQUESTS
27. AA. CONVERGE CREDENTIALS – \_LOCAL (JEREMY & BO)

Graphical user interface, application, Teams

Description automatically generated