**UNDERSTANDING DOCUMENT ON CLIENT COLLABORATION PROCESS**

The given flow outlines the client collaboration process, which has the steps involved in setting up and managing external collaboration sites at Milliman. The three major key roles in this process are client, consultant, and local approver. The process is initiated by the consultant by completing the site request form and after it is submitted in the Milliman, the Local approver gets a notification email about the request's approval. Later the local approver reviews the request. If the request is incomplete, then the form is marked as “incomplete” and notifies the requester that the request was incomplete. Later the consultant can again edit the form and again resubmit the form. If the local approvers click on no button for the request, then the request gets rejected and the requester i.e.-consultant will get a notification that the request has been rejected. If the local approver approves the request, then the parameters will be reviewed and finalized.

The local approver can also start the request directly on behalf of someone else. If the local approver starts the request, then he moves directly to the review and finalize step. After approving the finalized parameters, the external site will be provided. Then a notification will be sent to the requester and local approver that the site has been created. Later the local approver adds Milliman and guests to the site. Later multiple activities are done at a time. The first activity is Microsoft sending formal invitation with login info to the guests. Then the client will set up his/her own account. After creating the account, the client will collaborate with Milliman. After collaborating with the Milliman client will collaborate with guests. The second activity is inviting the guests to the site formally. The third activity is customizing the site.

After all the activities the two process will be done one is collaborated with guests and later check if the end date of the site is near or the site is in active for long. If the site is inactive for 3 months a notification will be sent to the consultant for every –14, -7, -2 days. If the end date of the site is near to –14, -7, -2 days then a notification telling site is reaching out should be sent.

Later an option should be shown to the consultant asking “Do you want to maintain the site active” if the consultant clicks on no or if there is no action then the site will be archived. If the consultant clicks on the yes button, then the application asks for a new end date and expands the life span of the site.

The other process is that consultant can request to add / remove the guests to the site. When the consultant requests then the local approver gets a notification telling there is a pending request. Then the local approver reviews the request and if he rejects the request, then remove FTE/guests to the site and if he approves the request then add FTE/guests to the site.

The above is the entire process of the client collaboration and the roles involved in the process and the action being performed at each node.