ONBOARDING CHECK-LIST – ADMIN

\*CLIENT NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\*START DATE: \_\_\_\_\_\_\_\_\_\_\_\_

**CONTRACT**

Receive contract from Management of potential new client

Prep/send contract in DocuSign - Client & Mark Signors, Marianne, Martina & Julie receive copy

Watch for returned signed contracts, set reminders

Contract returned, signed by both parties

**NOTE: Other than contracts, generally all onboarding info gets sent to the new client’s office manager unless otherwise noted.**

**ACCOUNTING**

Save Contracts to SP/Acctg/Docs/MSA’s/Client folder

Message Martina

/ Request/Confirm contract loaded in QuickBooks

/ Request/Confirm sample invoice initiation/emailed to Julie

Verify invoice information

Send sample invoice to client for verification, confirm recipient & contact info

Advise Marianne of verification, ask for approval to submit

Advise Martina of verification, recipient info, & approval to submit

**CODING TODAY**

Email client office manager, ask names/emails of staff requiring access

Email request to Carina

Received/Carina forwards info to clients

**CREATE TICKETS** – Fresh Desk (See Onboarding process instr - put Client Name FIRST in Summary)

**NEXTIVA**

As of 3/2023 – Every new FULL BILLING client will get a call group and email group, CODING Clients don’t need phone # or email group

Request Phone Number in Client Area Code and call group including the following staff:

\*\* Call groups will always be the phone staff, plus Acct Mgr/Lead:

* Julia Koenig
* Elana Wlodarchak
* Amy Willard
* Venus Chacon
* ​Philip Maclagen
* Martha Miranda

Received from IT

Test/Verify – Phone number, Auto Attendant, Call Center, Voice Mail (Martina & Brad assist with this)

Forward info to client via email, request test/verification

**EMAIL**

Request new email group created, include staff names that should be able to send/receive (see Marianne) – Includes call group, Acct Mgr, Acct Lead, Martina, and Marianne.

* Julia Koenig
* Elana Wlodarchak
* Amy Willard
* Venus Chacon
* ​Philip Maclagen
* Martha Miranda

\*\* As of 3/2023 – Every new FULL BILLING client will get a call group and email group, CODING Clients don’t need phone # or email group.

\*\*\*  Email group includes all of phone staff plus Marianne, Martina, Account lead & Account manager

Received from IT

Request Martina to Test/Verify

Forward info to client via email, request test/verification

**EBRIDGE**

Create ticket to Request client access for staff needed – need NAME/EMAIL/PHONE NUMBER!

Received from IT

Forward Username/Password to client via email, include following documents:

[eBridge scan import training.pdf](https://prsdata-my.sharepoint.com/personal/jworthington_prsdata_com/Documents/ONBOARDING-PRS/Admin_ONBOARD_info_JW/eBRIDGE/CLIENT%20Instructions/CLIENT%20eBRIDGE%20pdfs/eBridge%20scan%20import%20training.pdf)

[eBridge File Retrieval.pdf](https://prsdata-my.sharepoint.com/personal/jworthington_prsdata_com/Documents/ONBOARDING-PRS/Admin_ONBOARD_info_JW/eBRIDGE/CLIENT%20Instructions/CLIENT%20eBRIDGE%20pdfs/eBridge%20File%20Retrieval.pdf)

[eBridge Import.pdf](https://prsdata-my.sharepoint.com/personal/jworthington_prsdata_com/Documents/ONBOARDING-PRS/Admin_ONBOARD_info_JW/eBRIDGE/CLIENT%20Instructions/CLIENT%20eBRIDGE%20pdfs/eBridge%20Import_v2jw.pdf)

**☐ WELCOME PACKET** – Send as soon as possible, but after ALL info available.

☐ Update new client phone number, after verified

☐ Update new client email address, after verified

☐ Update PRS staff & contact info (see Marianne) - \* Acct Mgr/Account Lead

☐ Forward to client, request verification of new phone/email

☐ Set self/client reminders for packet return – 1 wk, 10 days, 2 wks

**NEW CLIENT FOLDERS**

New Client Folder –

Education Manual subfolder - Setup in SP/Billing/Operations/Docs

Monthly Report subfolder - Setup in SP/Billing/Operations/Docs