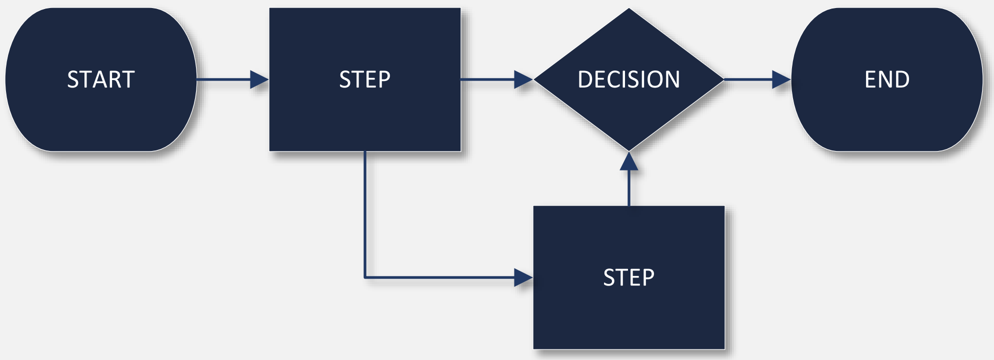
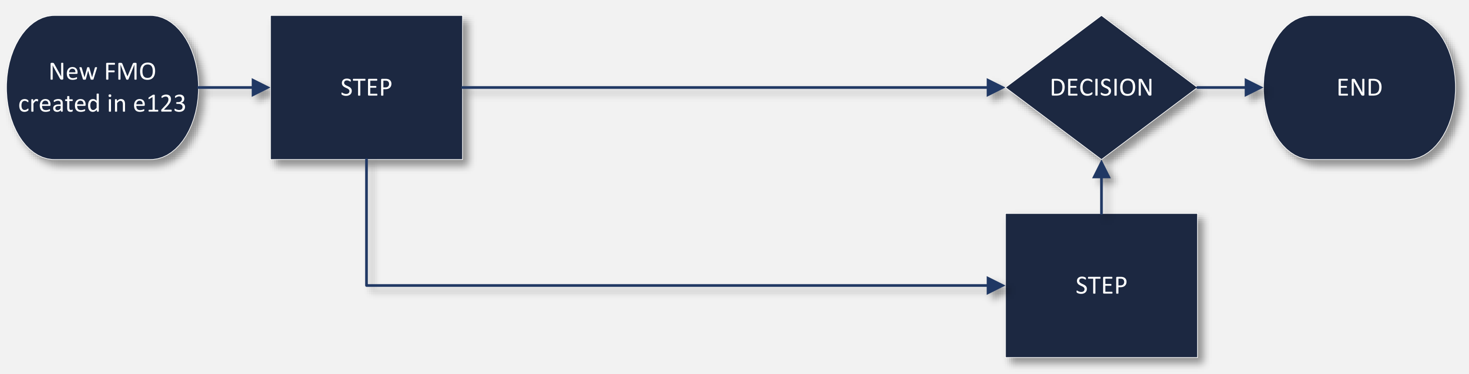
# ABC

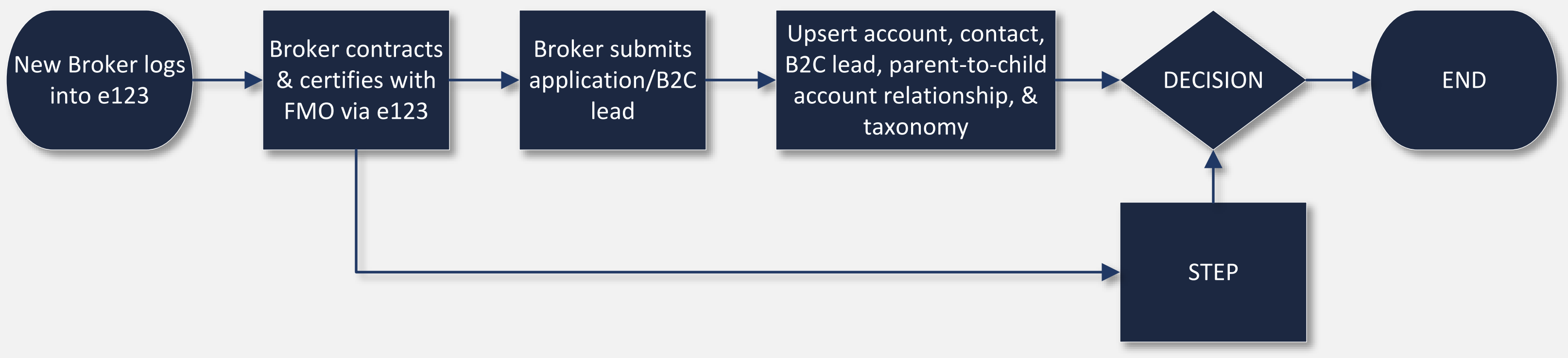


Account Channels-to-Opp Type:
1. Non-Contracted Referral Source Account
2. Contracted Referral Source Account
3. FMO Referral Source Account *NEW*

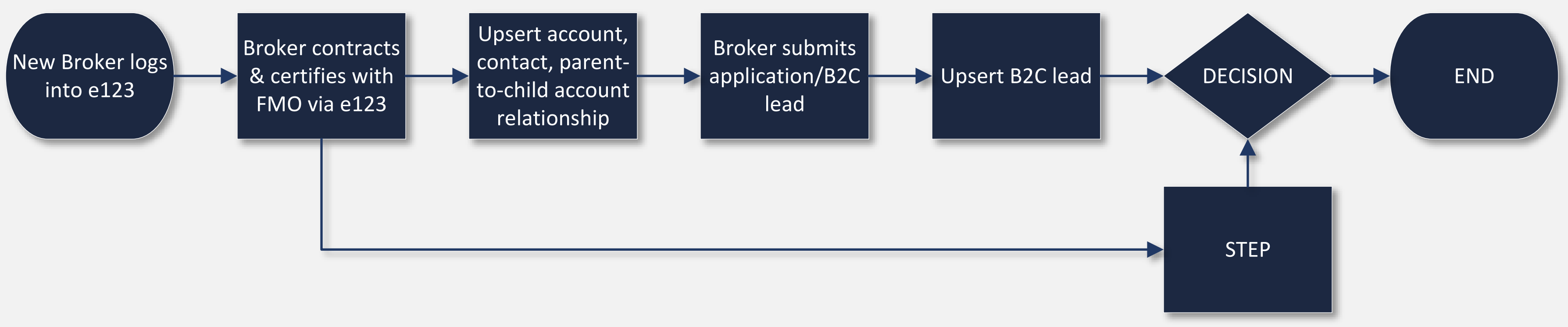
## FMO Onboarding



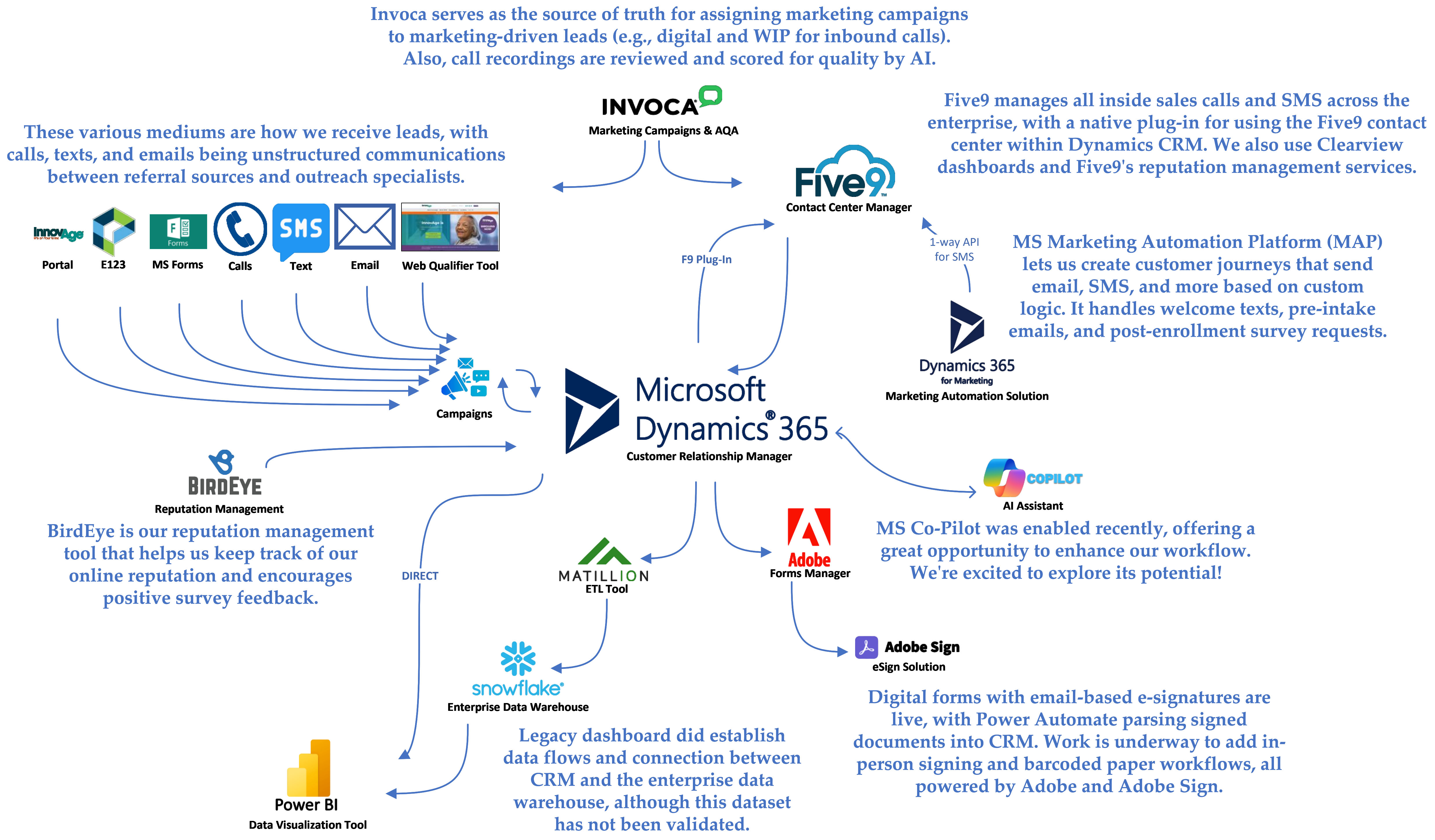

## Broker Activation (v1)



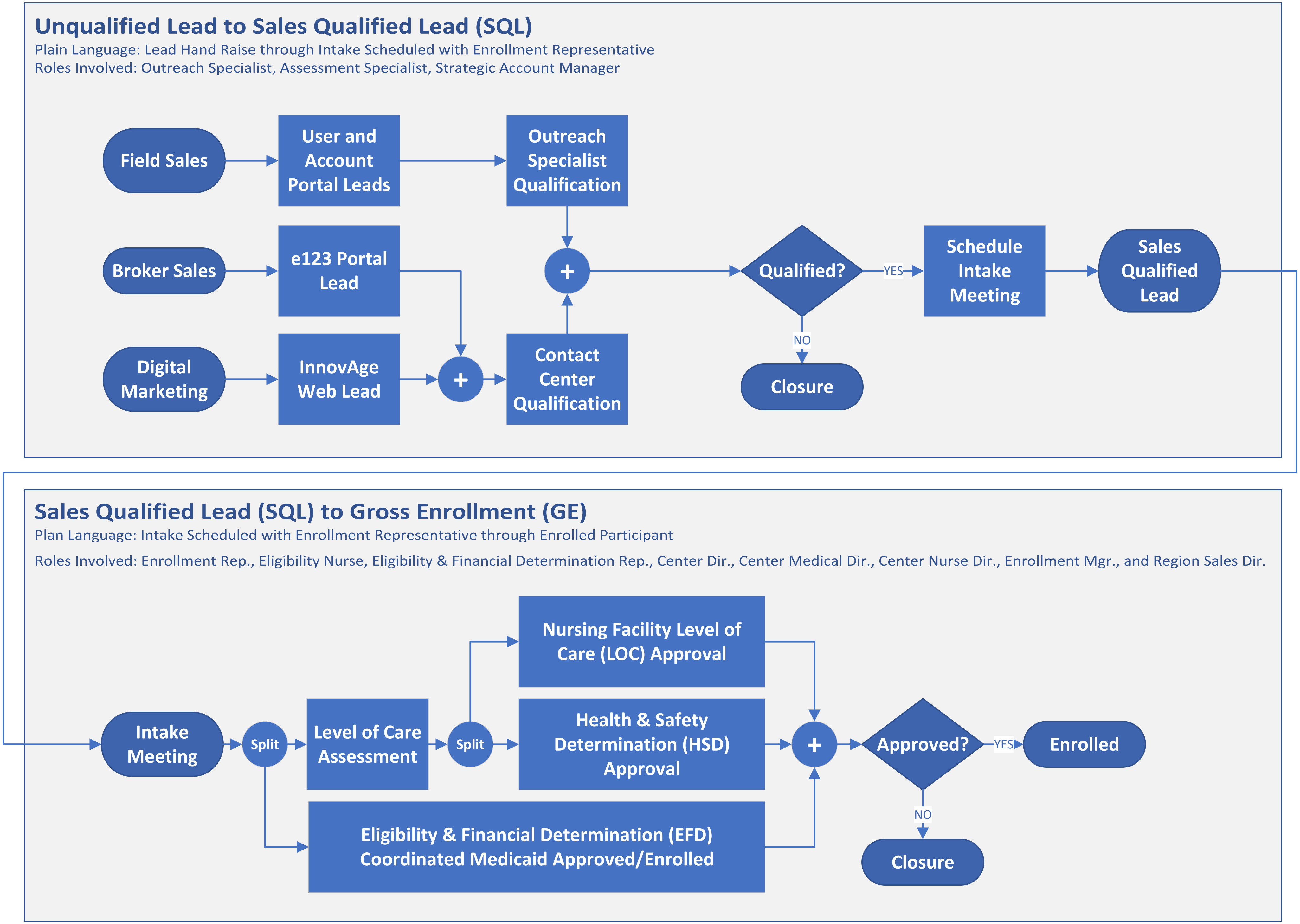

## Broker Activation (v2)



# InnovAge Tech Stack



# Participant Enrollment Process



# Campaigns System Design Document

**Trigger** *(def.)* is the event that causes the campaign taxonomy or association record to be upserted

**Contact Method** *(def.)* is the event or source that created the related record

**Campaign ID** *(def.)* is the unique combination of inputs used to create a unique identifier for the campaign

**Campaign Name** *(def.)* is the name of marketing initiative (defaults to the Campaign ID until user names campaign; does not need to be unique)

**Category** *(def.)* is the general strategy used to market to the customer

**Channel** *(def.)* is the setting through which the call to action was communicated

**Medium** *(def.)* is the setting through which the call to action was communicated

**Source** *(def.)* is the marketing tactic used to source the customer

**Content** *(def.)* is the visual and copy used in the marketing material

**Term** *(def.)* is the specific words and phrases used in our paid search

**Agent** *(def.)* is the contact that referred the participant lead

**Language** *(def.)* is what was used in the marketing copy

## Web Qualifier Tool (WQT)

| | | | |
|---|---|---|---|
| Trigger | **Web Qualifier Tool (WQT)** lead has info about the marketing campaign embedded within the URL | **Web Qualifier Tool (WQT)** lead has info about the marketing campaign embedded within the URL | **Web Qualifier Tool (WQT)** lead has info about the marketing campaign embedded within the URL |
| Contact Method | Web | Web | Web |
| Campaign ID | *Unique ID Combines...* Medium + Source + Content + Term | *Unique ID Combines...* Medium + Source + Content + Term | *Unique ID Combines...* Medium + Source + Content + Term |
| Campaign Name | *User can overwrite the default...* [Campaign ID] | *User can overwrite the default...* [Campaign ID] | *User can overwrite the default...* [Campaign ID] |
| Category | Digital | Digital | Digital |
| Channel | Search | Social | Organic |
| Medium | Google | Facebook | InnovAge Homepage |
| Source | Google AdWords | InnovAge Business Account Page | Organic |
| Content | InnovAge Landing Page Name | InnovAge Scroll Ad Name | InnovAge Homepage |
| Term | Search Term | Not Applicable | Not Applicable |
| Agent | Not Applicable | Not Applicable | Not Applicable |
| Language | *User can overwrite the default...* English | *User can overwrite the default...* English | *User can overwrite the default...* English |

## Inbound Phone Call

| | | | | | |
|---|---|---|---|---|---|
| Trigger | **Inbound Call** to inside sales creates new lead **without** marketing campaign info | **Inbound Call** to inside sales creates new lead **with** marketing campaign info | **Inbound Call** to inside sales creates new lead **with** marketing campaign info | **Inbound Call** to inside sales creates new lead **with** marketing campaign info | **Inbound Call** to inside sales creates new lead **with** marketing campaign info |
| Contact Method | Phone | Phone | Phone | Phone | Phone |
| Campaign ID | *Unique ID Combines...* A + B + C | *Unique ID Combines...* Medium + Source + Content + Term | *Unique ID Combines...* A + B + C | *Unique ID Combines...* Medium + Source + Content + Term | *Unique ID Combines...* Medium + Source + Content + Term |
| Campaign Name | *User can overwrite the default...* [Campaign ID] | *User can overwrite the default...* [Campaign ID] | *User can overwrite the default...* [Campaign ID] | *User can overwrite the default...* [Campaign ID] | *User can overwrite the default...* [Campaign ID] |
| Category | Traditional | Digital | Sales | Traditional | Traditional |
| Channel | Organic | Search | Print | Outdoor | Print |
| Medium | Reputation | Google | Sales Collateral | Vehicle Wrap | Newspaper |
| Source | Organic | Google AdWords | Brochure | Healthy Independence Wrap 2025 Fall | San Bernardino Sun 2026 Winter |
| Content | Reputation | InnovAge Landing Page Name | Spring 2024 Tri Fold | 2023 Bus Design | Newspaper Ad Version 2.03 |
| Term | Not Applicable | Search Term | Not Applicable | Not Applicable | Not Applicable |
| Agent | Not Applicable | Not Applicable | Not Applicable | Not Applicable | Not Applicable |
| Language | *User can overwrite the default...* English | *User can overwrite the default...* English | *User can overwrite the default...* English | *User can overwrite the default...* English | *User can overwrite the default...* English |

## CRM User

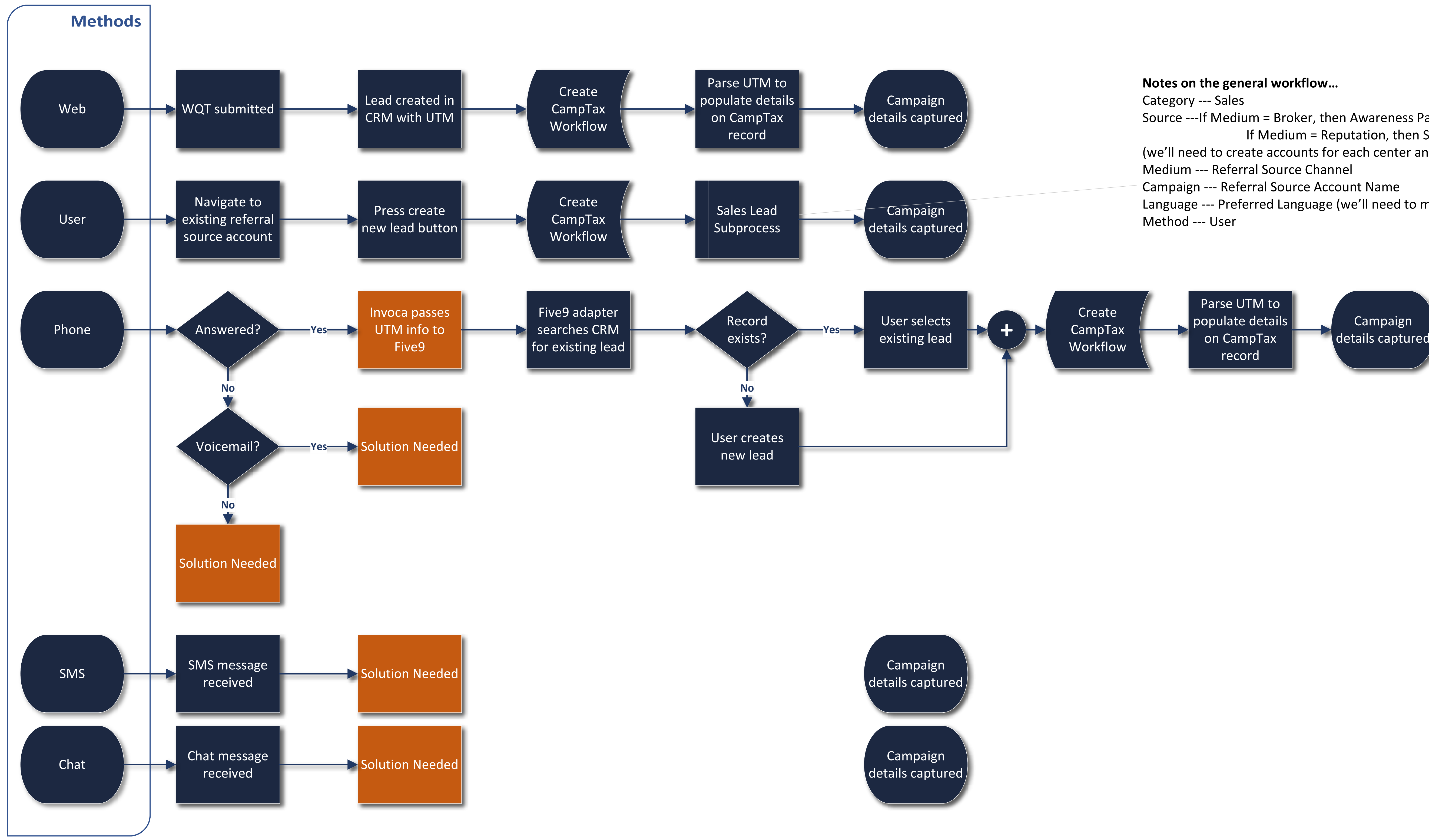
| | | | |
|---|---|---|---|
| Trigger | **CRM User** adds referral source account (**not** center account) and/or referral contact to a lead, contact, enrollment, or opp | **CRM User** adds a center account as the referral on a lead, contact, or enrollment, or opp (replaces friends & family) | **CRM User** adds a center account as the referral on a lead, contact, or enrollment, or opp (replaces friends & family) |
| Contact Method | User | User | User |
| Campaign ID | *Unique ID Combines...* A + B + C | *Unique ID Combines...* A + B + C | *Unique ID Combines...* A + B + C |
| Campaign Name | *User can overwrite the default...* [Campaign ID] | *User can overwrite the default...* [Campaign ID] | *User can overwrite the default...* [Campaign ID] |
| Category | Sales | Traditional | Traditional |
| Channel | *From the referral source account...* Independent Living | *From the referral source account...* Care Center | *From the referral source account...* Care Center |
| Medium | *If Contact Center User <> Yes, Then...* Field Sales | Reputation | Reputation |
| Source | *From the referral source account...* Acme Villas | *From the referral source account...* Denver | *From the referral source account...* Denver |
| Content | Not Applicable | Not Applicable | Not Applicable |
| Term | Not Applicable | Not Applicable | Not Applicable |
| Agent | *From the referral contact...* First Last | Not Applicable | Not Applicable |
| Language | *User can overwrite the default...* English | *User can overwrite the default...* English | *User can overwrite the default...* English |

## Other Triggers

| | | | | | | |
|---|---|---|---|---|---|---|
| Trigger | **InnovAge Portal User** submits new lead | **e123 Portal User** adds referral source and/or referral contact to a lead, contact, enrollment, or opp | **Rep/Territory Dedicated Landing Page/QR Code** creates new lead | **Live Event Dedicated Landing Page/QR Code** creates new lead, contact, enrollment, or opp | **Chat** conversation creates new and/or interacts with open lead, contact, enrollment, or opp | **Inbound SMS** creates new and/or interacts with open lead, contact, enrollment, or opp |
| Contact Method | Portal | e123 | Web | Event | Chat | SMS |
| Campaign ID | *Unique ID Combines...* A + B + C | *Unique ID Combines...* A + B + C | *Unique ID Combines...* Medium + Source + Content + Term | *Unique ID Combines...* A + B + C | *Unique ID Combines...* A + B + C | *Unique ID Combines...* A + B + C |
| Campaign Name | *User can overwrite the default...* [Campaign ID] | *User can overwrite the default...* [Campaign ID] | *User can overwrite the default...* [Campaign ID] | *User can overwrite the default...* [Campaign ID] | *User can overwrite the default...* [Campaign ID] | *User can overwrite the default...* [Campaign ID] |
| Category | Sales | Broker | Sales<br>Today: If contact method = web, then referral source category = Digital | Sales | Digital | Digital |
| Channel | *From the referral source account...* Independent Living | *From the referral source account...* Medicare Advantage Broker | Print | Event | Search | Search |
| Medium | *If Contact Center User <> Yes, Then...* Field Sales | *If Contact Method = e123, Then...* Broker Sales | QR Code | Conference | Google | Google |
| Source | *From the referral source account...* Acme Villas | *From the referral source account...* Acme Villas | Brochure | Orlando Health Fair FY26Q4 | Google AdWords | Google AdWords |
| Content | Not Applicable | Not Applicable | Spring 2024 Tri Fold | Not Applicable | InnovAge Landing Page Name | InnovAge Landing Page Name |
| Term | Not Applicable | Not Applicable | Not Applicable | Not Applicable | Search Term | Search Term |
| Agent | *From the referral contact...* First Last | *From the e123 portal user...* First Last | Not Applicable | Not Applicable | Not Applicable | Not Applicable |
| Language | *User can overwrite the default...* English | *User can overwrite the default...* English | *User can overwrite the default...* English | *User can overwrite the default...* English | *User can overwrite the default...* English | *User can overwrite the default...* English |

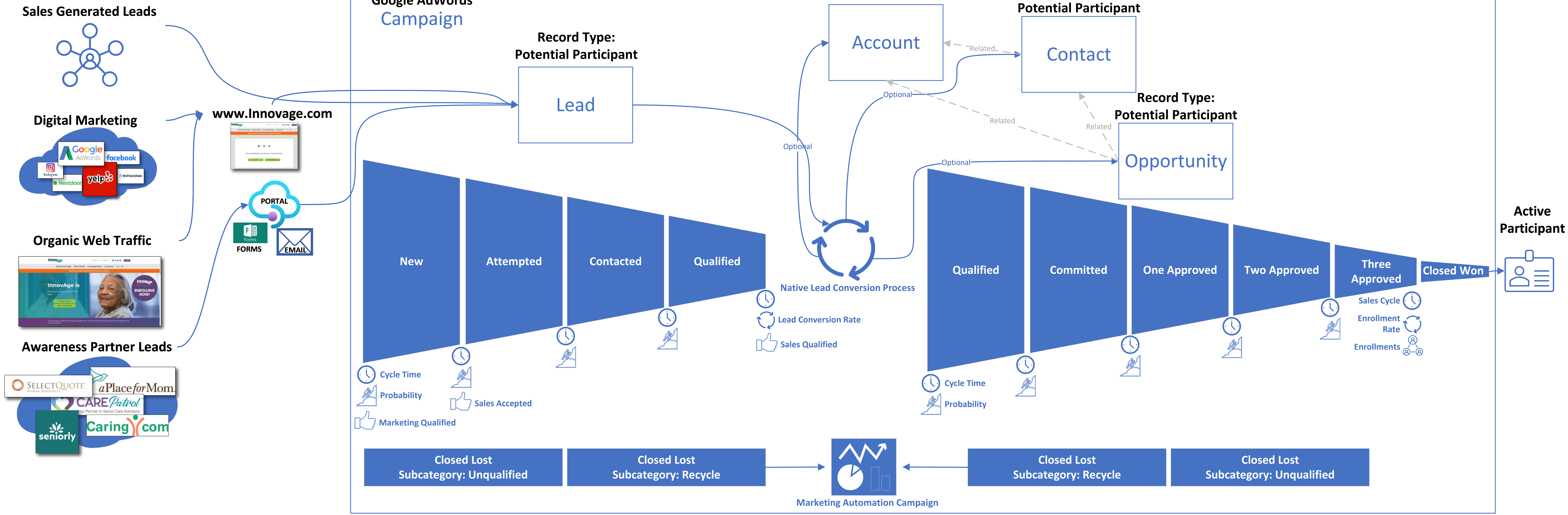
Cell fill denotes that example needs attention

Cell fill denotes that some value needs to be defaulted



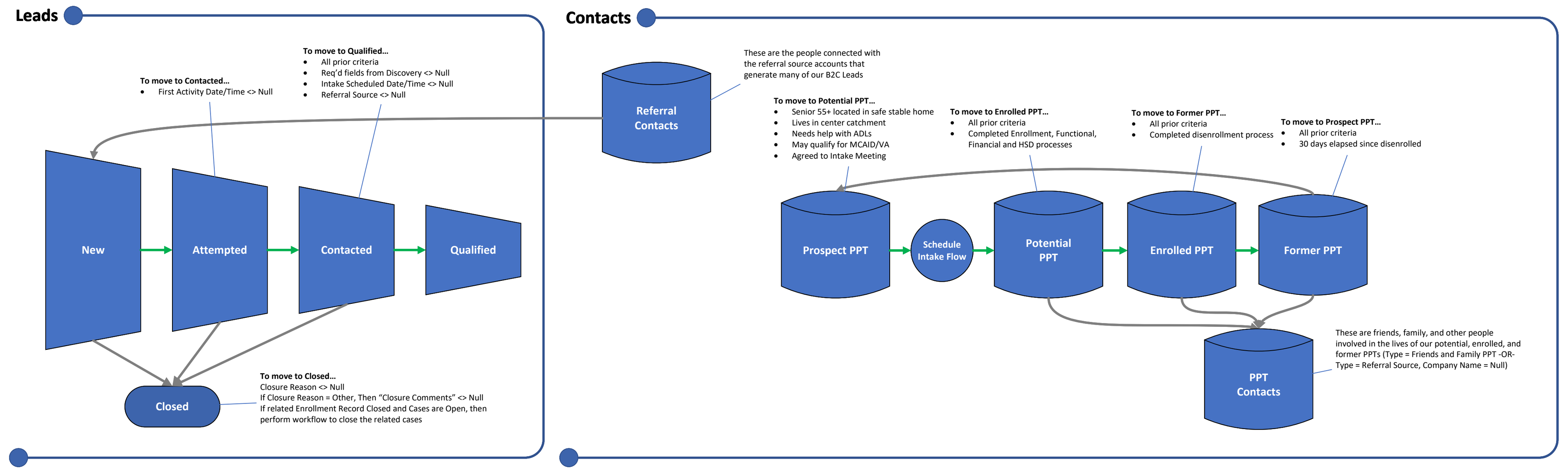

**Notes on the general workflow…**
Category --- Sales
Source ---If Medium = Broker, then Awareness Partner, else…
If Medium = Reputation, then Source = Reputation, else Source = Outside Sales
(we'll need to create accounts for each center and train to this process)
Medium --- Referral Source Channel
Campaign --- Referral Source Account Name
Language --- Preferred Language (we'll need to make a new field and have it map on over to the contact too)
Method --- User

# Participant Pipeline (FS)



## Parking Lot, Key Fields, Flows, etc.

- **FLOW** --- If the opportunity closed, then all open associated cases are marked closed; associated Contact remains Potential Participant
- **Enrollment/FXN/FIN/HSD** --- Create a "Last Stage Change Date" field with workflow to stamp when stage is changed
- **Enrollment/FXN/FIN/HSD** --- Create a "Days in Stage" field that calculated as Today – "Last Stage Change Date"
- **FIN** --- Create date/time stamp for first time case goes to "Ready" status.
- **FIN** --- To move to "Submitted" or "Re-Submitted", then "Third Party Expected Response Date" field <> Null -AND- "Third Party Submission Date" <= Today
- **FIN** --- Create a "Third Party Expected Response Date" field
- **FIN** --- Create a "Third Party Submission Date" field
- **HSD** --- Create an HSD Appointment form specific for HSDs only
- **HSD** --- Create a Pend Counter, Held Counter, Denial Counter, PHD Counters, Approval Counter
- **HSD** --- Create flow that stamps "First HSD Decision Date", "First HSD Decision", "Last HSD Decision Date", "Last HSD Decision", "HSD Decision Counter", "First HSD Scheduled Date", "Last HSD Scheduled Date", "HSD Scheduled Counter"
- **Enrollment** --- Create a "Prior Stage" field that is systematically stamped with the stage the record was in prior to having the stage updated. Will help us measure how many enrollments go from the various stages → closed.




### What does it take to complete an Intake?

**Demographics**
- DOB <> Null
- Mobile Phone, Home Phone, and Email <> All Be Null (e.g., one required)
- Legal Gender <> Null
- Race <> Null
- Ethnicity <> Null
- Marital Status <> Null
- Outreach Specialist <> Null
- Enrollment Representative <> Null
- Anticipated Signature Date <> Null

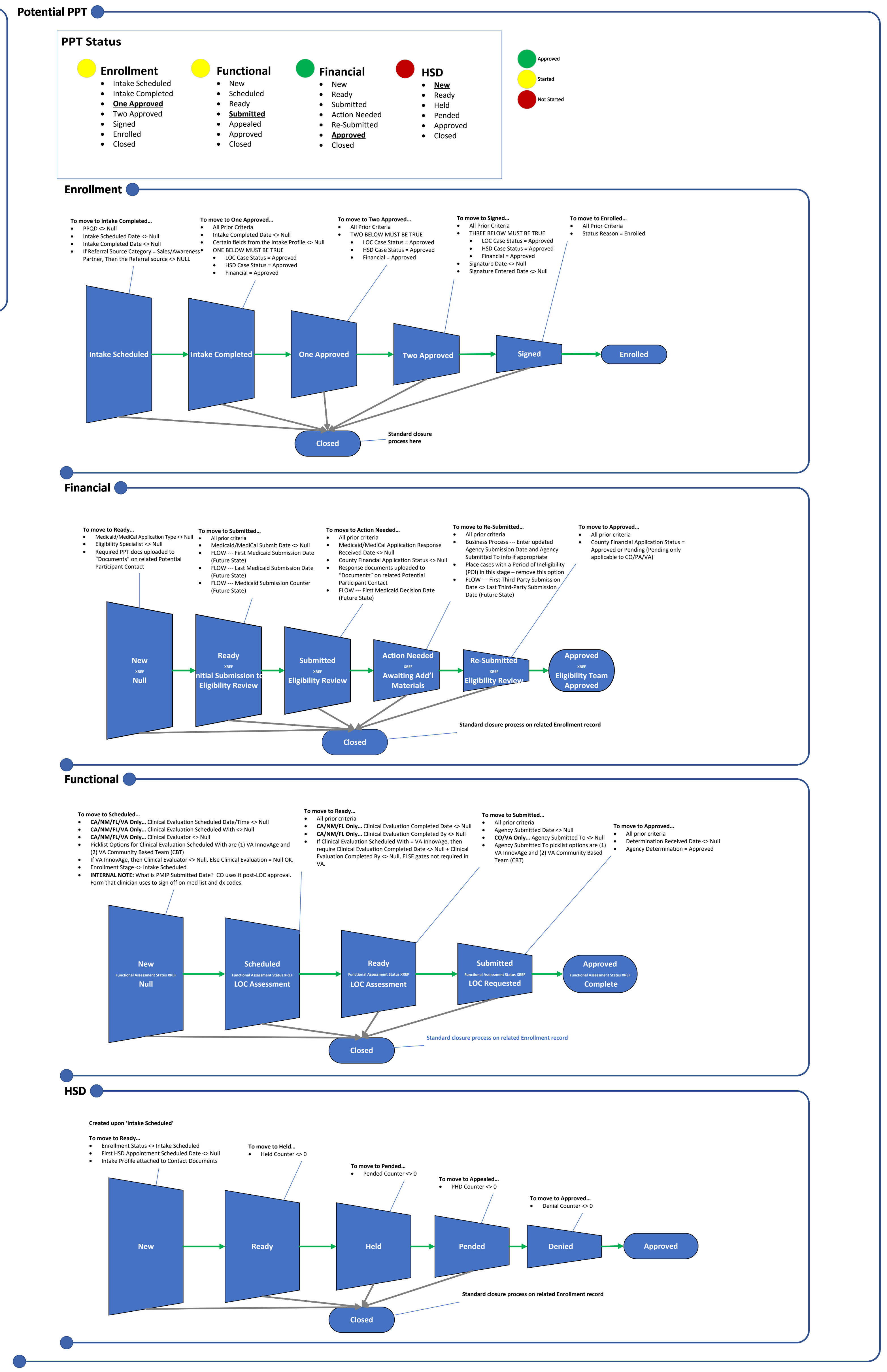
**Safe and Stable Home Near Located Near a Center Fields:**
- Center <> Null
- Residence Type <> Null
- Address <> Null
- Emergency Contact Name <> Null
- Emergency Contact Phone <> Null
- Emergency Contact Relationship <> Null

**Medicaid Fields:**
- Medicaid/MediCal at Intake <> Null
- Medicare at Intake <> Null
- Veteran <> Null
- Other Insurance Coverage <> Null
- Checking Account <> Null
- Savings Account <> Null
- Brokerage Account

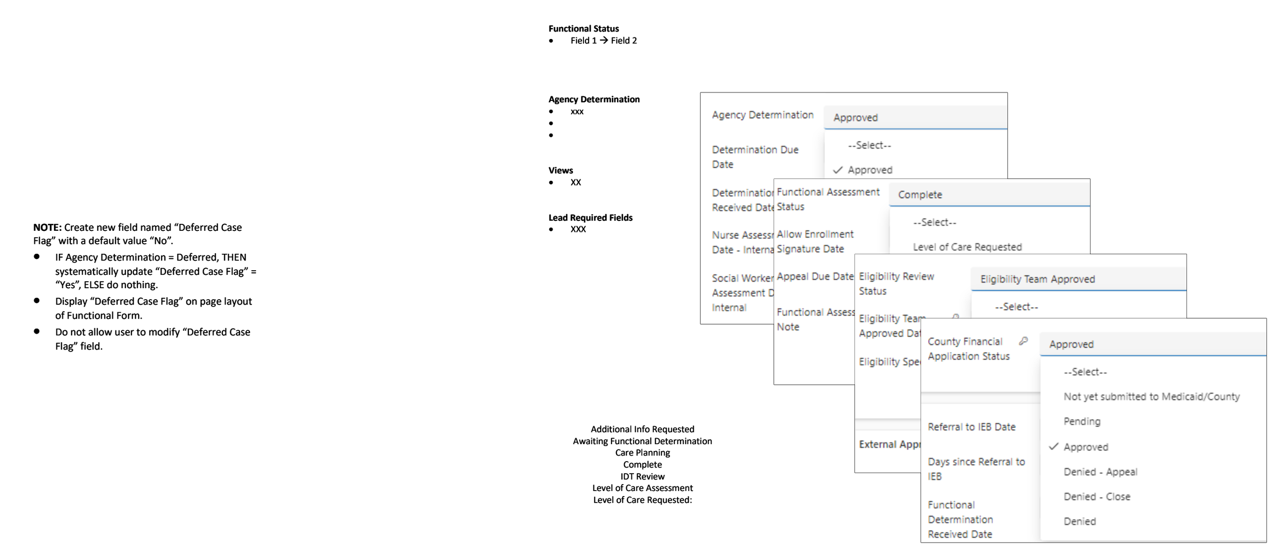

**Safe and Stable Home Near Located Near a Center Fields:**
- Center <> Null
- Residence Type <> Null
- Address <> Null
- Emergency Contact Name <> Null
- Emergency Contact Phone <> Null
- Emergency Contact Relationship <> Null


**Acts of Daily Living Fields:**
- Medical Diagnosis Comments <> Null
- XX

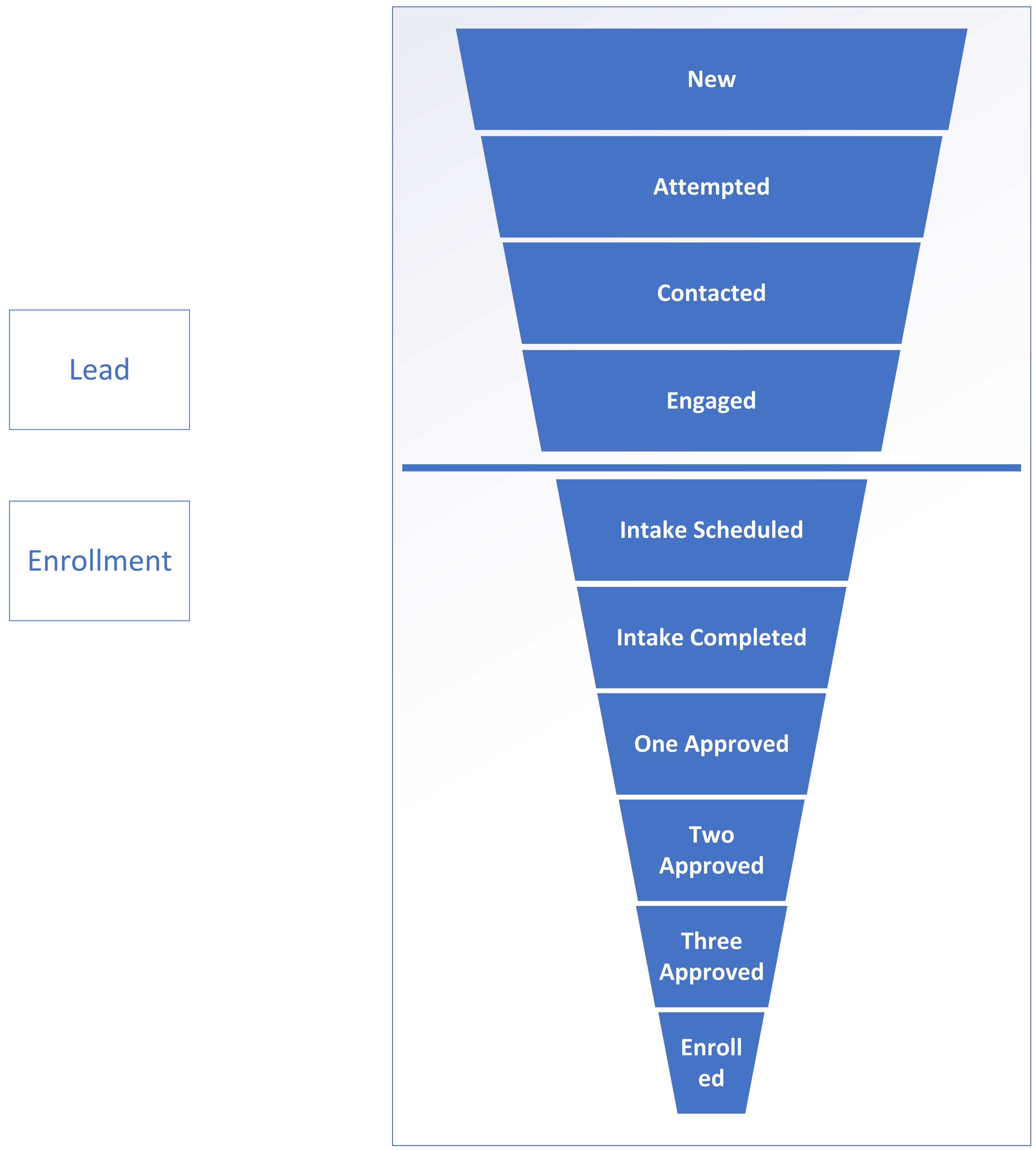
**Behavioral Health**
- Medical Diagnosis Comments <> Null
- XX




Denial Letter Status
New
Ready
Reviewed
Sent/Done
Denial Letter Approved Date
Denial Letter Sent Date
Denial Reason (picklist)
Denial Reason Subcategory (picklist)



## Participant Pipeline Stages (B2C)




**New** (*def.*) leads start the enrollment process and have not been attempted to be contacted yet

**Attempted** (*def.*) leads have been attempted to be contacted

**Contacted** (*def.*) leads have been contacted without having completed the full discovery process and/or the PPT has not yet agreed to schedule an intake within the next 14 days

**Engaged** (*def.*) leads have an upcoming discovery meeting and/or something needs to be resolved to schedule an intake within the next 14 days

**Intake Scheduled** (*def.*) enrollments have been pre-qualified with a scheduled the intake meeting

**Intake Completed** (*def.*) enrollments have completed the intake meeting

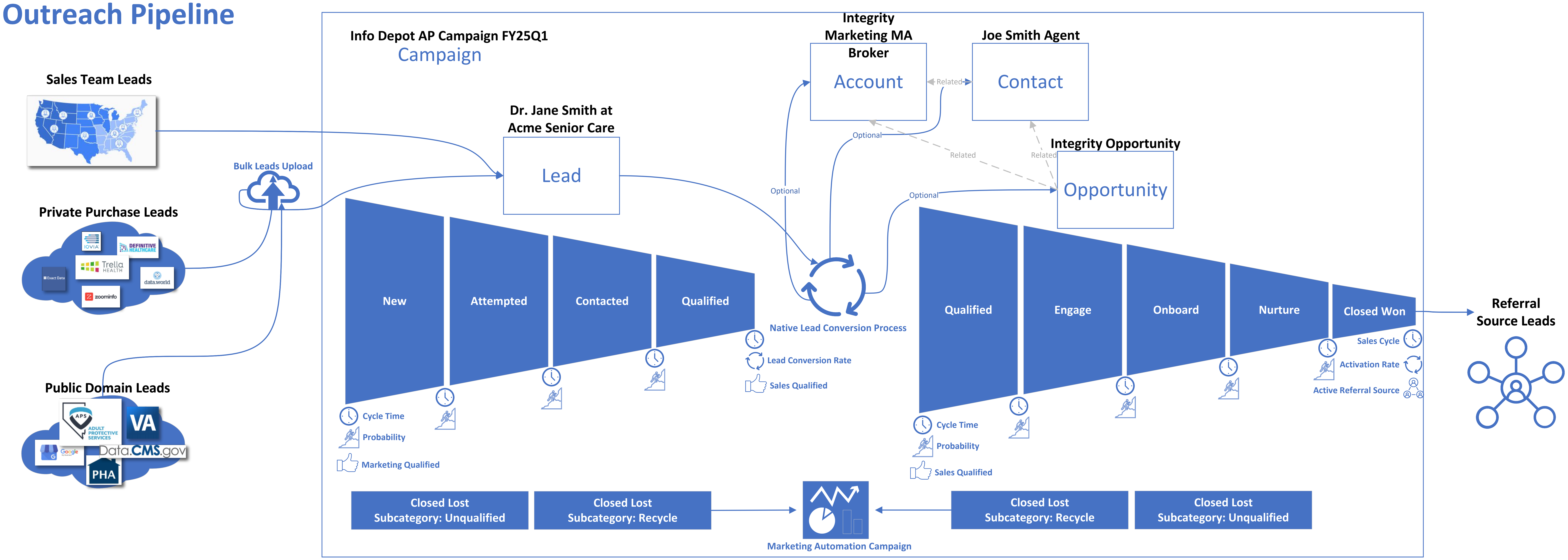
**One Approved** (*def.*) enrollments have approved one of the related Functional, Financial & HSD cases

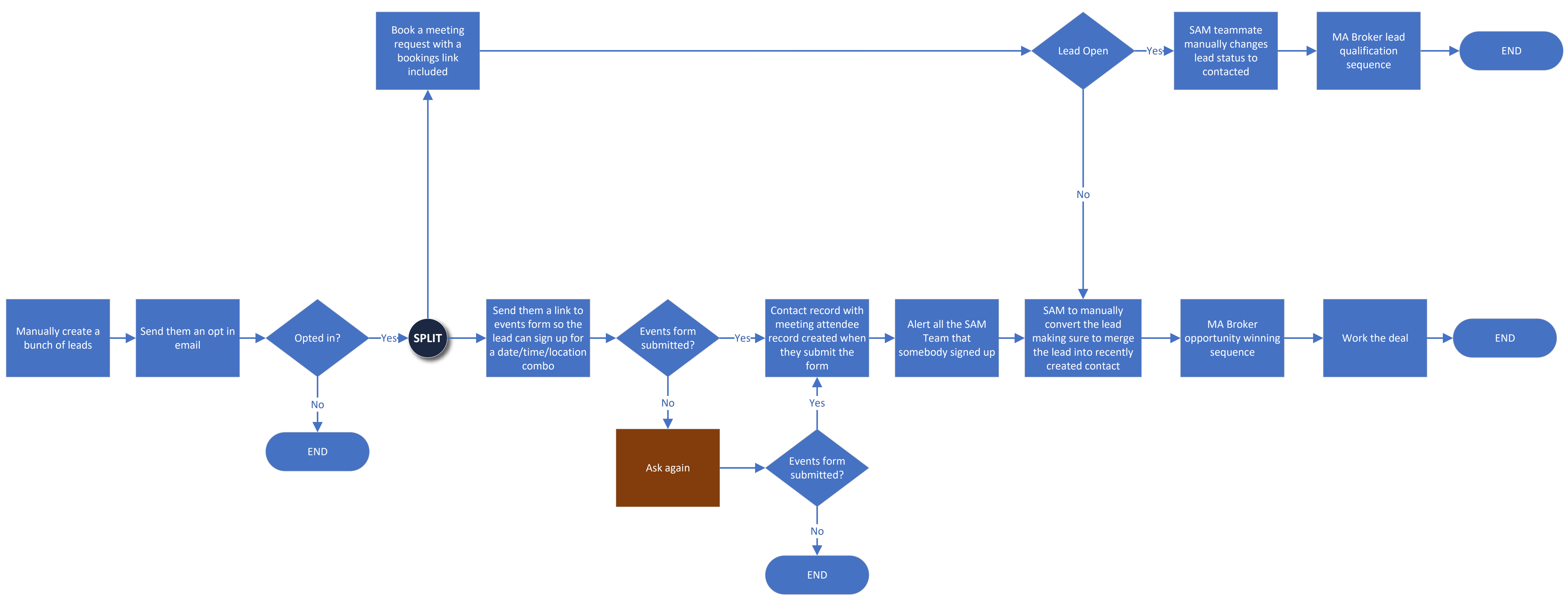
**Two Approved** (*def.*) enrollments have approved two of the related Functional, Financial & HSD cases

**Three Approved** (*def.*) enrollments have approved three of the related Functional, Financial & HSD cases

**Enrolled** (*def.*) enrollments are officially recognized as a gross enrollment

# Outreach Pipeline

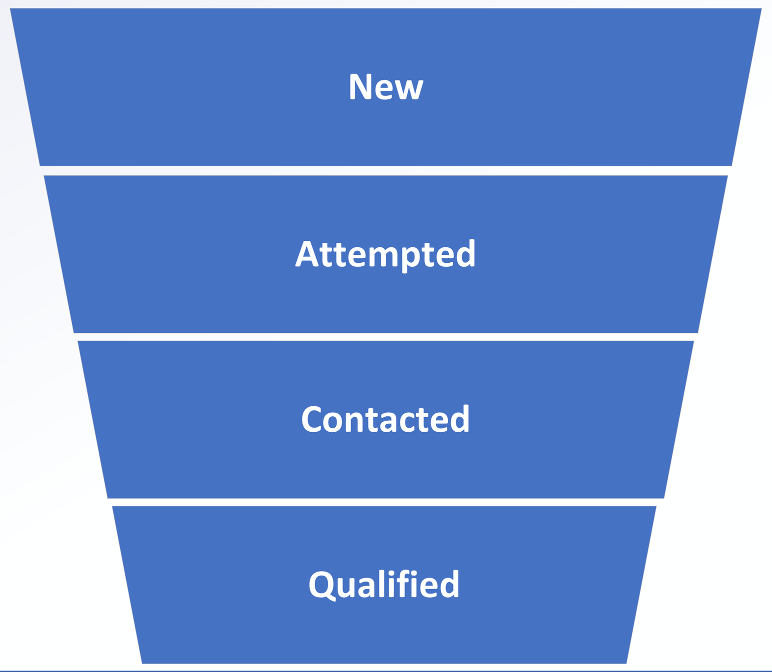


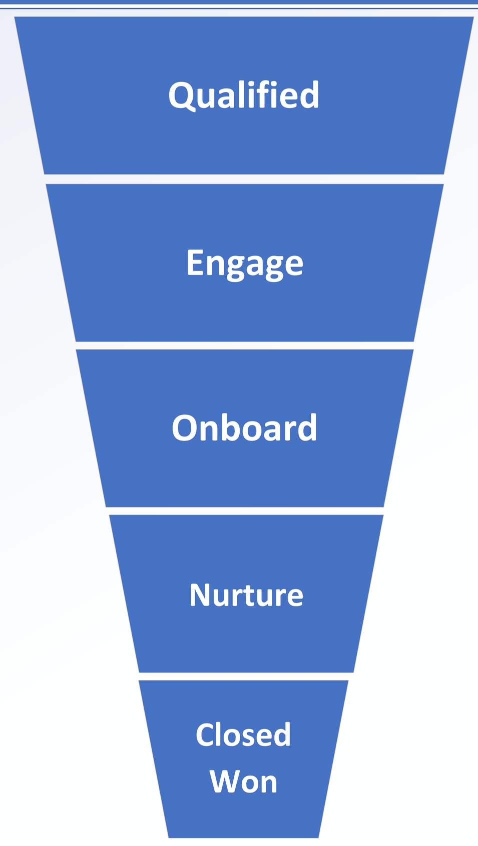
# Sales Outreach Funnel

## Lead

### Account Leads




## Opportunity




### Participant Leads

## Stage Definition / Stage Gates

| Stage Definition | Stage Gates |
|---|---|
| **New** (*def.*) Referral Source Leads have not been actioned by the Sales Team | **Required** \| First Name, Last Name, Phone **-or-** Email. **Nice-to-Have** \| Potential Leads Per Month, Licensed Insurance Agents, Agency Locations, Estimated Annual Plans Sold, Service Area (e.g., Local, State, Regional, National) **Note** \| Need to leverage this info to create a lead score for the B2B leads. |
| **Attempted** (*def.*) Referral Source Leads have been attempted to be contacted by the Sales Team | **Required** \| ABC<br>**Nice-to-Have** \| ABC |
| **Contacted** (*def.*) Referral Source Leads have been contacted by the Sales Team. Business address. Full name, phone, email. | **Required** \| ABC<br>**Nice-to-Have** \| ABC |
| **Qualified** (*def.*) Referral Source Leads appear to be a viable PACE/LIFE participant referral source | **Required** \| Business Address; Business Channel; Business Name; Business Phone; Full Name; Contact Phone; Contact Email; Estimated Annual PPT Leads;<br>**Nice-to-Have** \| ABC |
| **Qualified** (*def.*) Referral Source Leads appear to be a viable PACE/LIFE participant referral source | **Required** \| ABC. **Nice-to-Have** \| ABC. **Note** \| If new account created, then make the related contact the Primary Business Contact. Make a field for Secondary Business Contact. Create a field of Contract Signer Contact field that is a lookup to the related contacts. Should we create a tags-like system to identify the types of roles related contacts play for a business account? |
| **Engage** (*def.*) Referral Source Opportunities are actively discussing Innovage benefits and able to estimate leads per month. We get all the forms back from the customer. | **Required** \| ABC **Nice-to-Have** \| ABC **Note** \| Need to create a sequence of logical questions that reliably categorize the account for the $400 or $1200 type of awareness partner agreement. |
| **Onboard** (*def.*) Referral Source has started the onboarding process. Confirmations that the contract was executed in Lextree, training completed in our LMS, created a portal/web form/SharePoint, reference guide sent. CRM has info needed to populate the account detail request form, W9 request, vendor template, and contract. | **Required** \| W9 uploaded on account record; System stamp of first/last W9 upload date; $400 vs. $1200 AP Type; What are min. fields to populate the Adobe Sign templates for Vendor Accounts Payable/vendor onboarding and Lextree/contract; **Nice-to-Have** \| ABC |
| **Nurture** (*def.*) is the step where we continue to work with the account on submitting their first lead | **Required** \| ABC **Nice-to-Have** \| ABC |
| **Closed Won** (*def.*) Referral Source Opportunities have produced one (1) participant lead in the past three (3) months | **Required** \| ABC **Nice-to-Have** \| ABC |

## Account Performance Status


**Prospect** (*def.*) accounts have not generated 1 UQL/SQL/GE in the past ever

**Productive** (*def.*) accounts have generated 1 UQL/SQL/GE in the past 2 months

**At Risk** (*def.*) accounts have generated 1 UQL/SQL/GE in the past 3 to 4 months

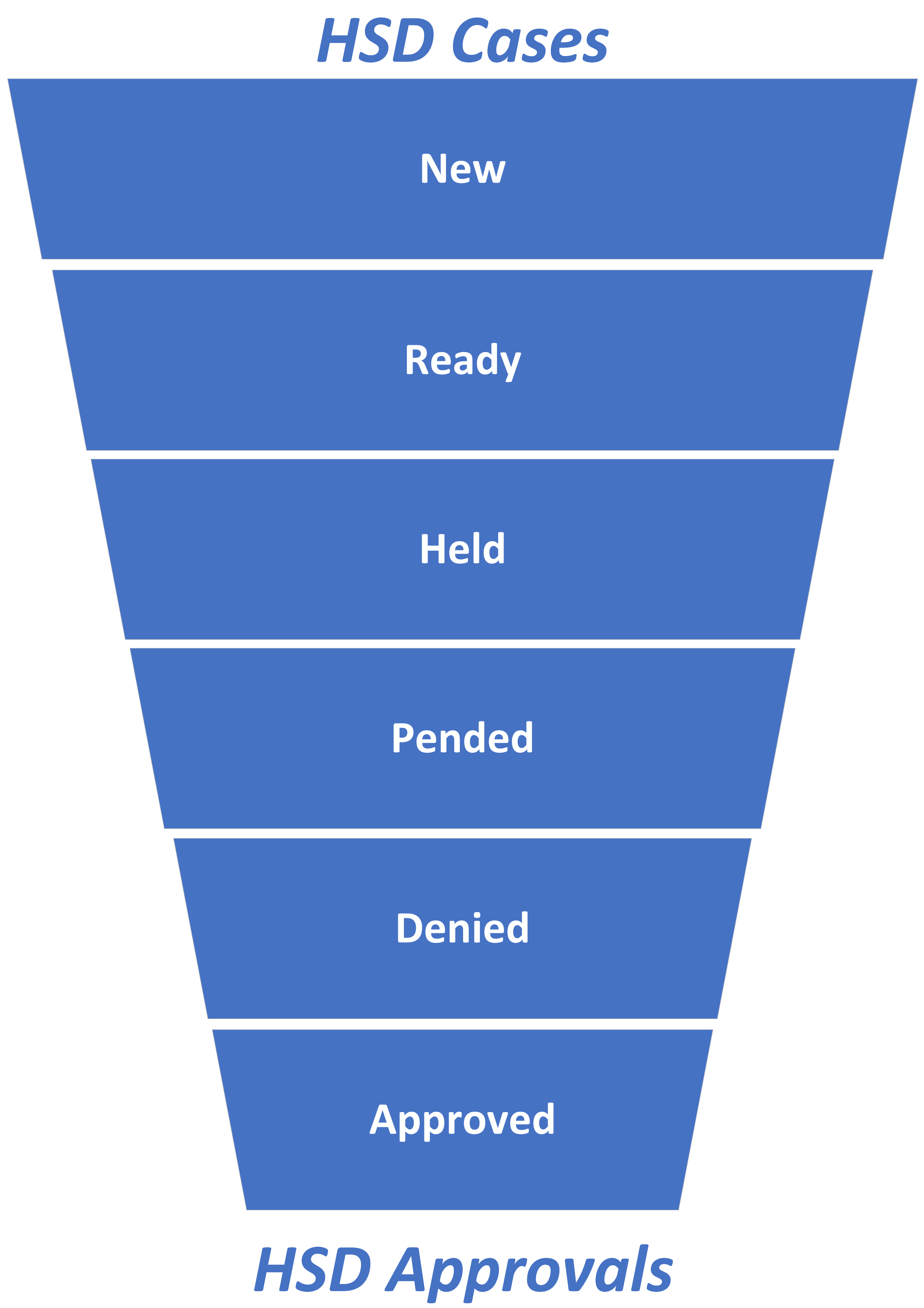
**Critical** (*def.*) accounts have generated 1 UQL/SQL/GE in the past 5 to 12 months

**Former** (*def.*) accounts were productive in the past but have not generated 1 UQL/SQL/GE in the past 12 months

### Discrete Field Metrics on Business Accounts

- First, Last, Next Activity Date
- First Lead Created Date, Last Lead Created Date, Leads All Time, Leads Last Month, Leads Last 2 Months, Leads Last 4 Months, Leads Last 5 Months, Leads Last 12 Months
- First Enrollment Completed Date, Last Enrollment Completed Date, Enrollments All Time, Enrollments Last Month, Enrollments Last 2 Months, Enrollments Last 4 Months, Enrollments Last 5 Months, Enrollments Last 12 Months

# Health and Safety Determination Stages




**New** (*def.*) cases default to this stage

**Ready** (*def.*) cases have all the information required to be reviewed by the HSD Committee

**Held** (*def.*) cases do need to be re-presented to the HSD committee once requested conditions have been met

**Pended** (*def.*) cases do not need to be re-presented to the HSD committee once requested conditions have been met

**Denied** (*def.*) cases have been denied and require internal escalation to resolve and/or the enrollment be closed

**Approved** (*def.*) cases have been deemed that the PPT can likely live safely with PACE/LIFE

# Financial Stages

***Financial Cases***


***Financial Approvals (MCAID/VA/SELF)***

**New** (*def.*) cases default to this stage

**Ready** (*def.*) cases have the attachments needed to verify existing Medicaid coverage and/or to apply for Medicaid (e.g., Sales → EFD)

**Submitted** (*def.*) cases have been handed off to the third-party agency (e.g., EFD → Third-Party)

**Action Needed** (*def.*) cases have requested additional information be provided for a final decision (e.g., Third-Party → EFD)

**Re-Submitted** (*def.*) cases have been handed off to the third-party agency two or more times (e.g., EFD → Third-Party)

**Approved** (*def.*) cases have been financially approved

# Financial Stages

*Financial Cases*


*Financial Approvals (MCAID/VA/SELF)*

**New** (*def.*) cases default to this stage
POA status. SS#. DOB. Financial release of information and Financial POA paperwork (if applicable).

**Verify** (*def.*) cases are prepared to have primary insurance status confirmed. (e.g., Sales → EFD)
Income and assets tab. Bank statements. Medicaid App Type. Signed Medicaid Application. Financial history requirements.

**Review** (*def.*) cases have the attachments needed to verify existing Medicaid coverage and/or to apply for Medicaid. Financial checklist is created. If checklist completed, then EFD specialist submits/approves, else click the 'back stage button' to send back to Ready
To go into submitted then Submission Counter <> 0.
**Checklist** (*def.*) cases require additional information and/or documentation in order to be submitted/approved pending.

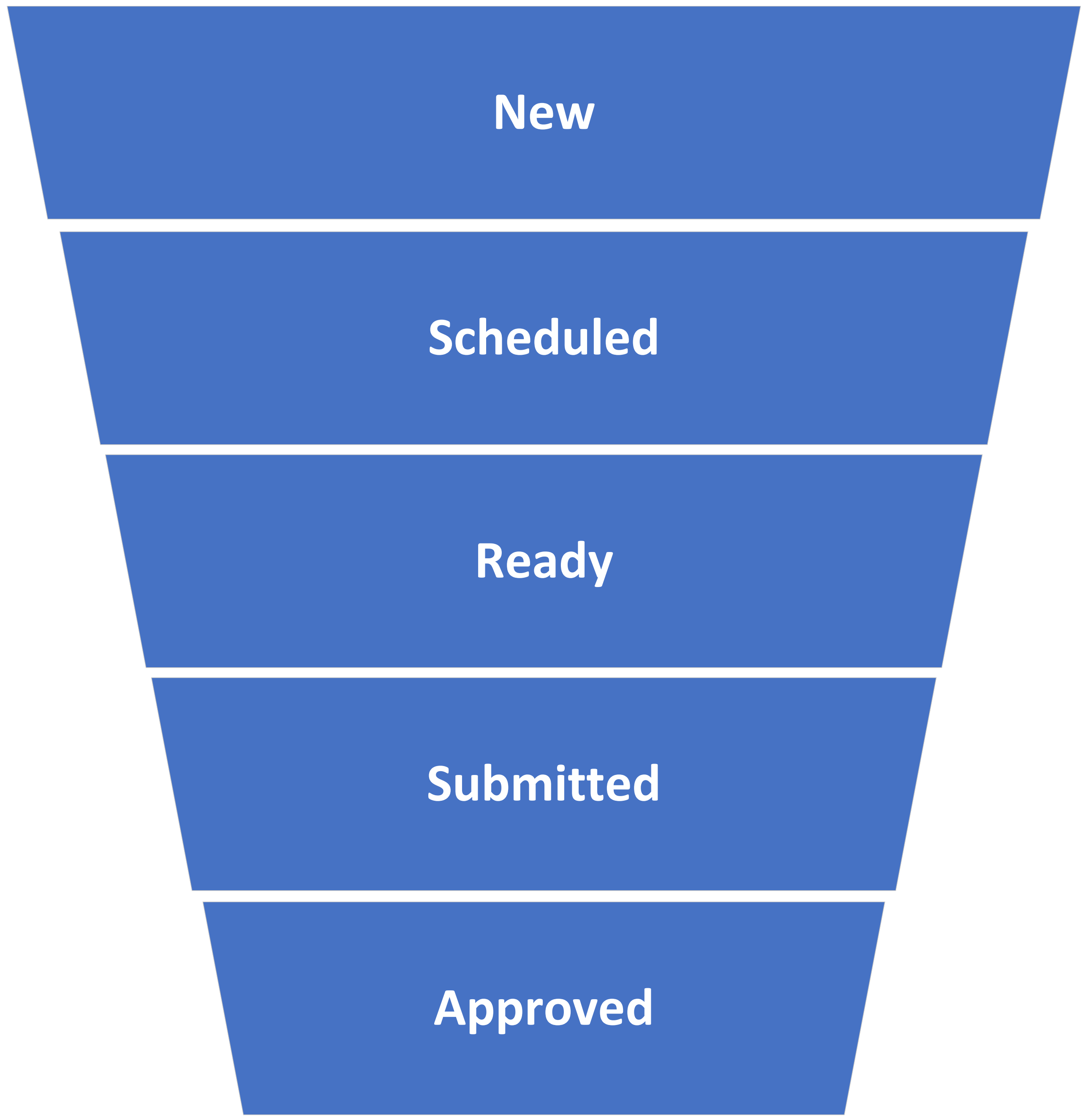
**Submitted** (*def.*) cases have been handed off to the third-party agency (e.g., EFD → Third-Party).
Create a first and last submission date and type on the related Financial record. First and last submission outcome stamps too.

**Action Needed** (*def.*) cases have requested additional information be provided for a final decision (e.g., Third-Party → EFD)

**Approved** (*def.*) cases have been financially approved

# Functional Stages

***Functional Cases***




***Certified Nursing Home LOC***

**New** (*def.*) cases default to this stage

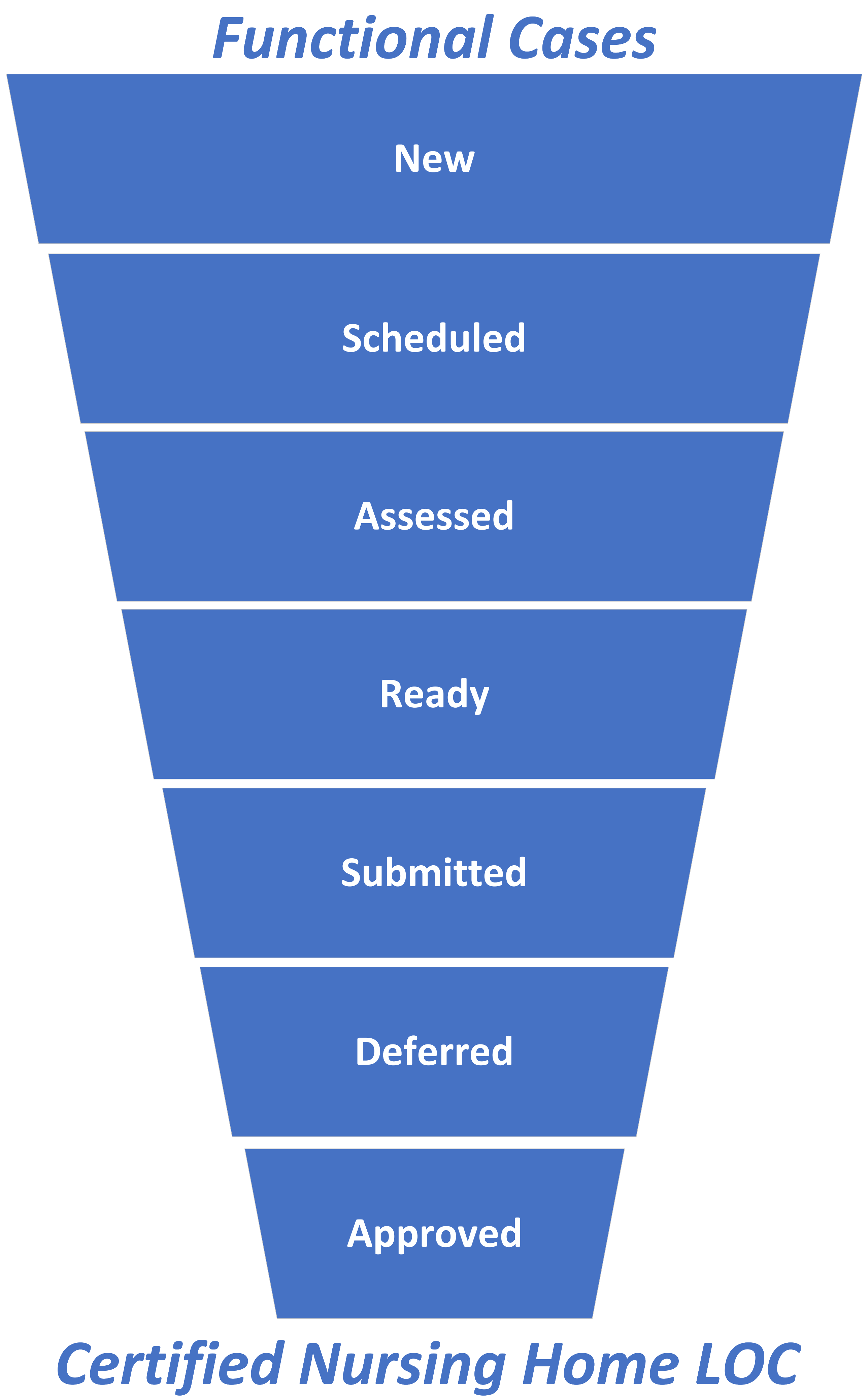
**Scheduled** (*def.*) cases have had a clinical resource to perform an LOC assessment in CA/VA/NM/CO

**Ready** (*def.*) cases have received the clinical assessment from the clinical resource in CA/VA/NM/CO

**Submitted** (*def.*) cases have been handed off to the third-party LOC certification agency (Submitted LOC assessment in CA/NM/VA and have requested LOC assessment be performed in CO/FL/PA)

**Approved** (*def.*) cases certified the PPT has an official nursing home level of care

# Functional Stages




**New** (*def.*) cases default to this stage

**Scheduled** (*def.*) cases have had a clinical resource to perform an LOC assessment in CA/VA/NM

**Assessed** (*def.*) cases are being finalized by the clinical resource in CA/VA/NM

**Ready** (*def.*) cases have received the clinical assessment from the clinical resource in CA/VA/NM

**Submitted** (*def.*) cases have been handed off to the third-party LOC certification agency (Submitted LOC assessment in CA/NM and have requested LOC assessment be performed in CO/FL/PA/VA)

**Deferred** (*def.*) cases received a deferral back from the third-party LOC certification agency

**Approved** (*def.*) cases certified the PPT has an official nursing home level of care

Dashboard Info:
1. Appointments scheduled today/this week
1a. Appointments completed this week/month/year
2. LOC write ups not completed
3. LOC write ups recently completed
4. Scheduled/Completed/Cancelled/~~Declined~~/~~Rescheduled~~ appointment rates (mimic how appointments are being used on the HSD currently)
4a. If scheduled date/time changes outside initial creation, then increment the named "Rescheduled Counter" up by one. Make sure to enable field level audit tracking on appointment scheduled date/time.
5a. Stamp the clinical assessment appointment scheduled date/time on related functional record.
5b. Stamp the clinical assessment appointment completed date/time on related functional record.
5c. Utilize the existing fields:
    Submitted to Agency Date
    Determination Due Date
    Determination Received Date
    Agency Determination (approved, pending, denied, etc.)
5d. Start to use new fields that include:
    Clinical Assessment First Scheduled Date (should be date/time field). And possibly re-use the LOC scheduled date field)
    Clinical Assessment Last Scheduled Date (should be date/time field). And possibly re-use the LOC scheduled date field)
    Clinical Assessment Scheduled Counter
    Clinical Assessment Cancelled Counter
    Clinical Assessment Completed Date (should be date/time field).
6. All these appointments need to be synced back into Outlook.
7. When the Clinical Assessment Completed Date updated, system calculates days from first scheduled to first completed. Field should have one decimal place and be based on days. Field can be named Days to Complete Clinical Assessment

Ensure all these outlook details are passed to the event in Outlook:
- First Name
- Last Name
- Address (w/hyperlink)
- Phone number
- How to access the site field (e.g., door code, etc.)
- Translator required
- Identify the POA information in the appointment

How to handle the deferred assessment process?

Timestamp exactly when the assessment was completed. Flow is already there to capture when the LOC appointment is marked completed.

Create SLUMS score field. Integer field type.

Create LOC Submission Task Type with these possible outcomes:
1. Approved (maybe Accepted)
2. Deferred
3. Denied

Must add field to capture what nurse did the actual LOC write up. Goal is to measure the approved, deferred, and denied rate by nurse, center, state, ER, OS.

Create counter fields for each LOC Assessment Appointment outcomes. Also, need counters for LOC Submission Task Type outcomes. Mimic functionality of HSD.

Need a list of all nurses that may be doing LOC assessments from Courtney to get them into CRM

Similar approach for line item security, make sure we put nursing hierarchy onto user record.

@Courtney to create a templatized paper script as backup

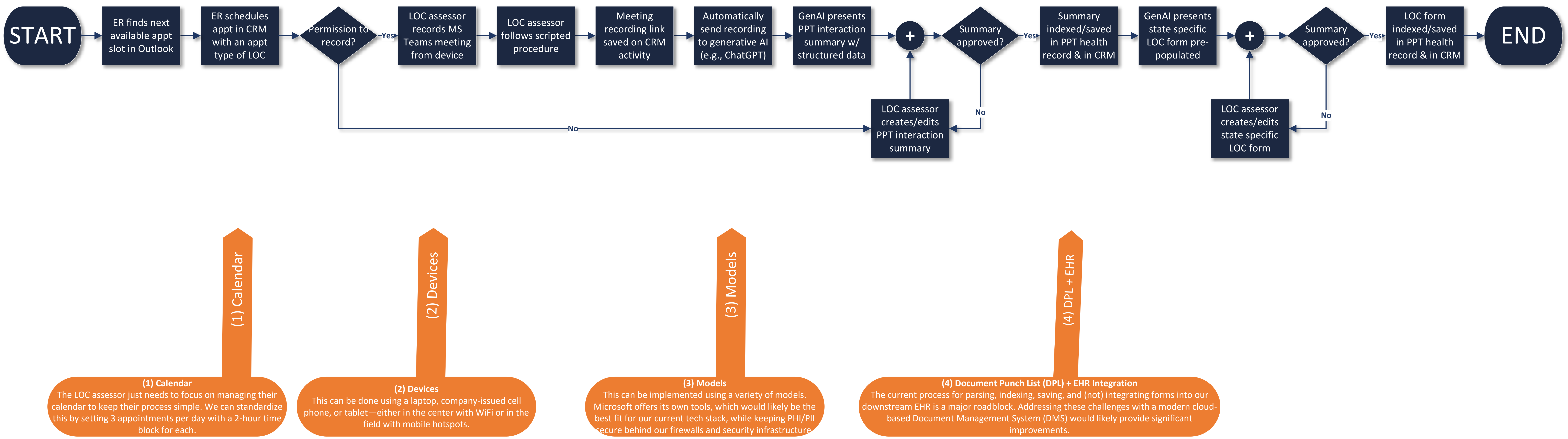
Create logic that prompts user with an "Are You Sure?" type message getting them to attest that the info on the enrollment profile/nursing assessment is accurate

How to determine which nurse will do assessment?
ER teammates know the local nurses and check Outlook availability.

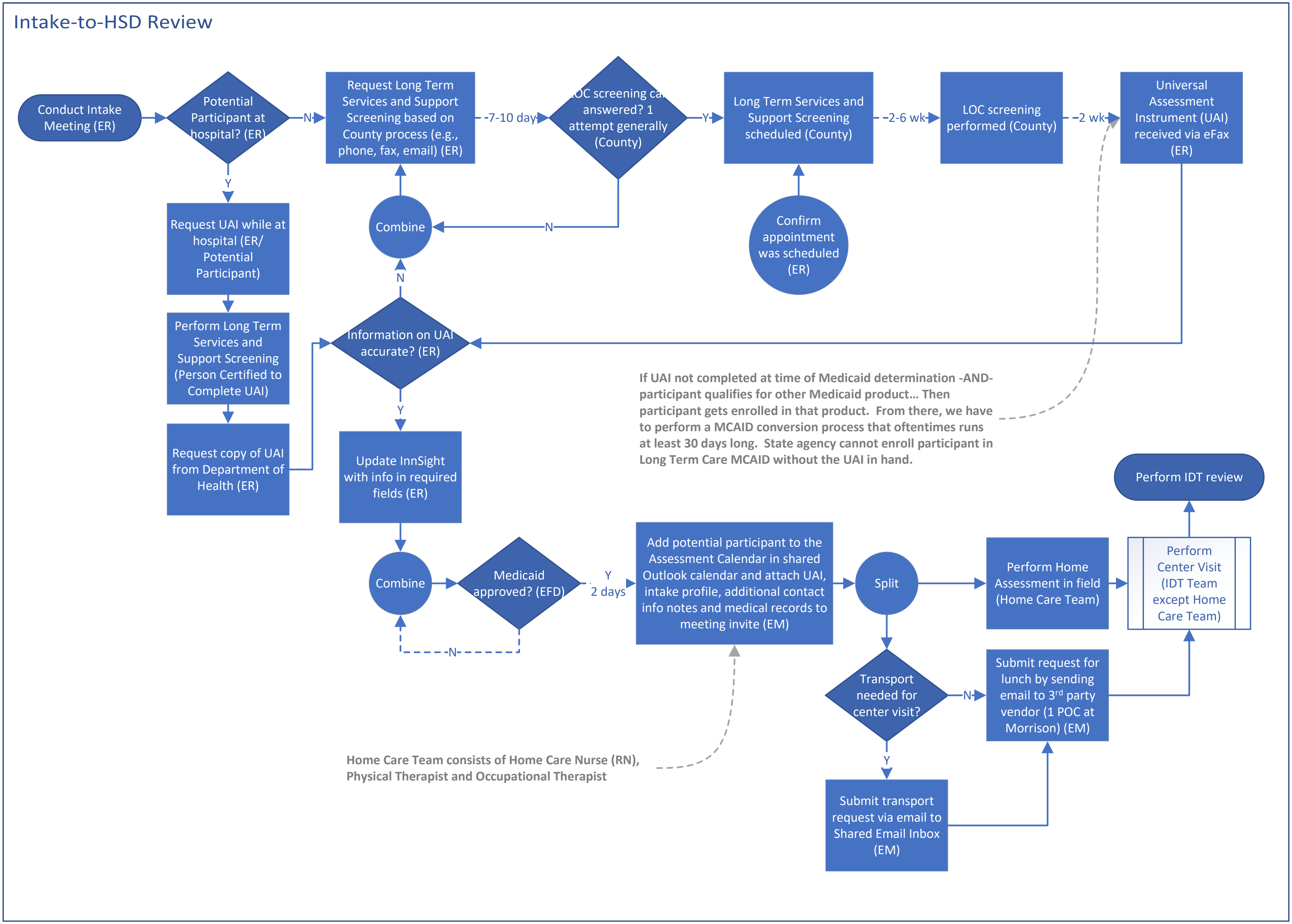
Confirmed the outlook response status does not show in timeline.

# LOC x GPT

## Determine PPT Level of Care Process

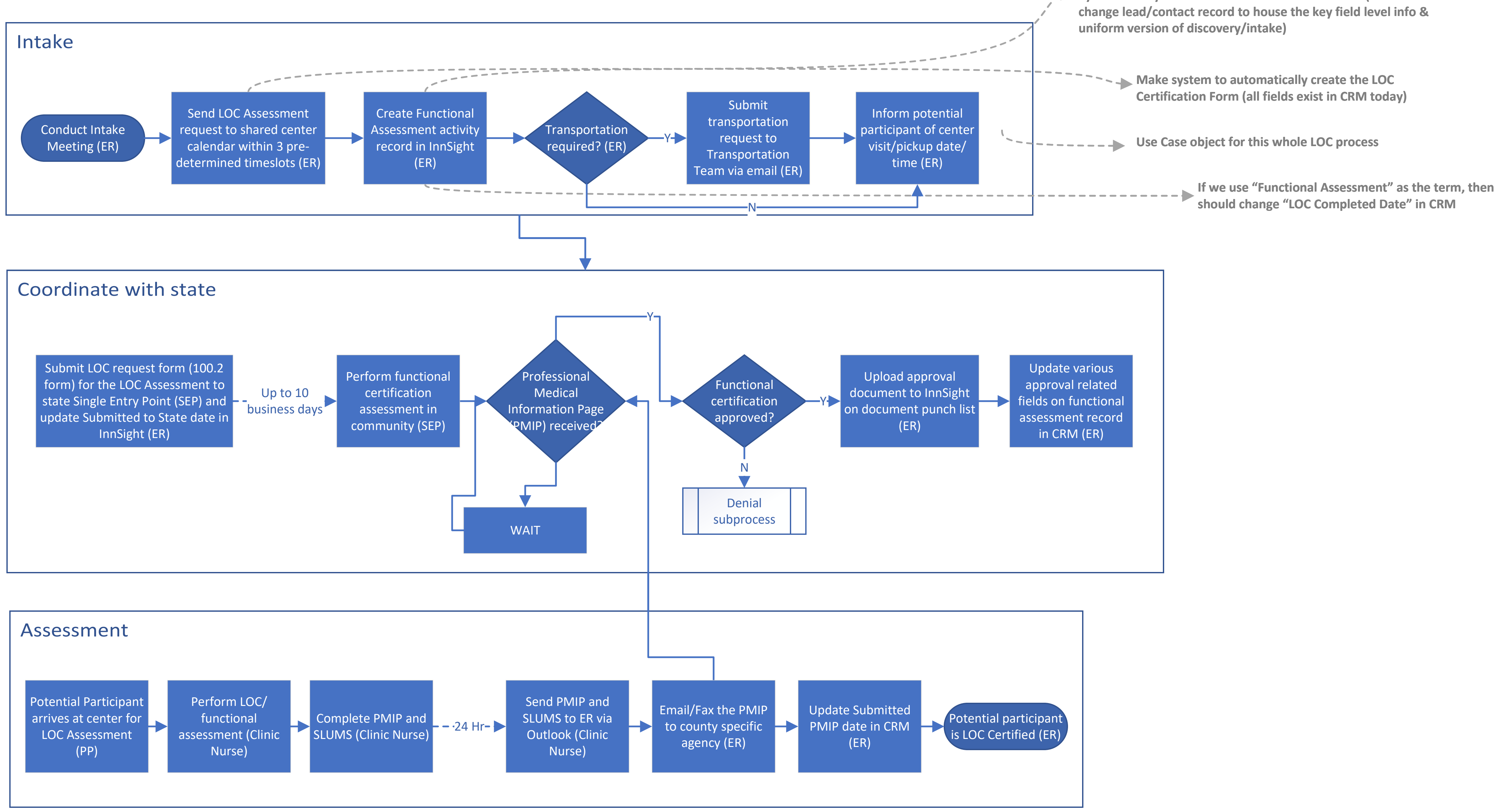


# Virginia Level of Care Assessment Process (Current State)



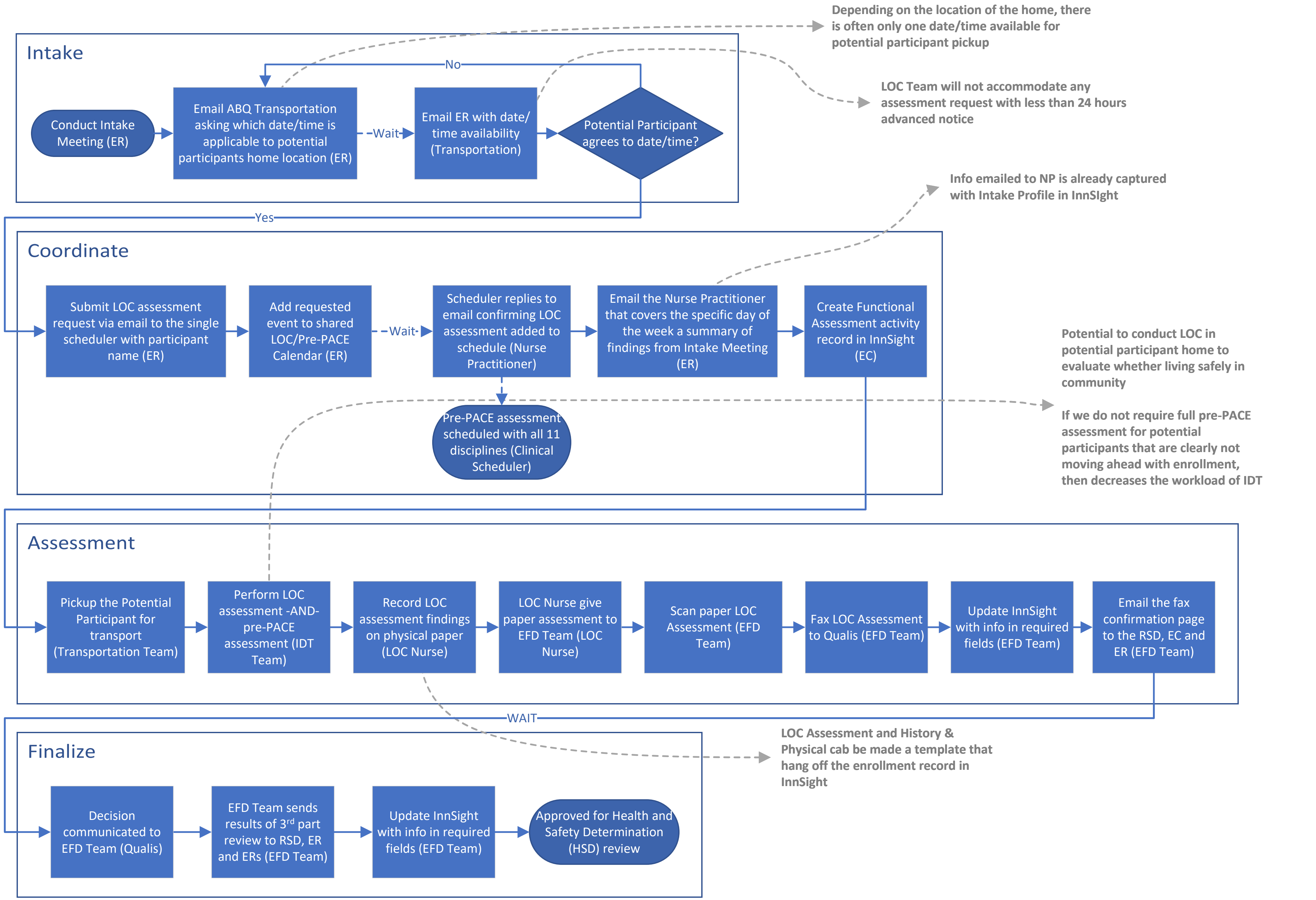
## Colorado Level of Care Assessment Process (Current State)

# Colorado Level of Care Assessment Process (Future State)

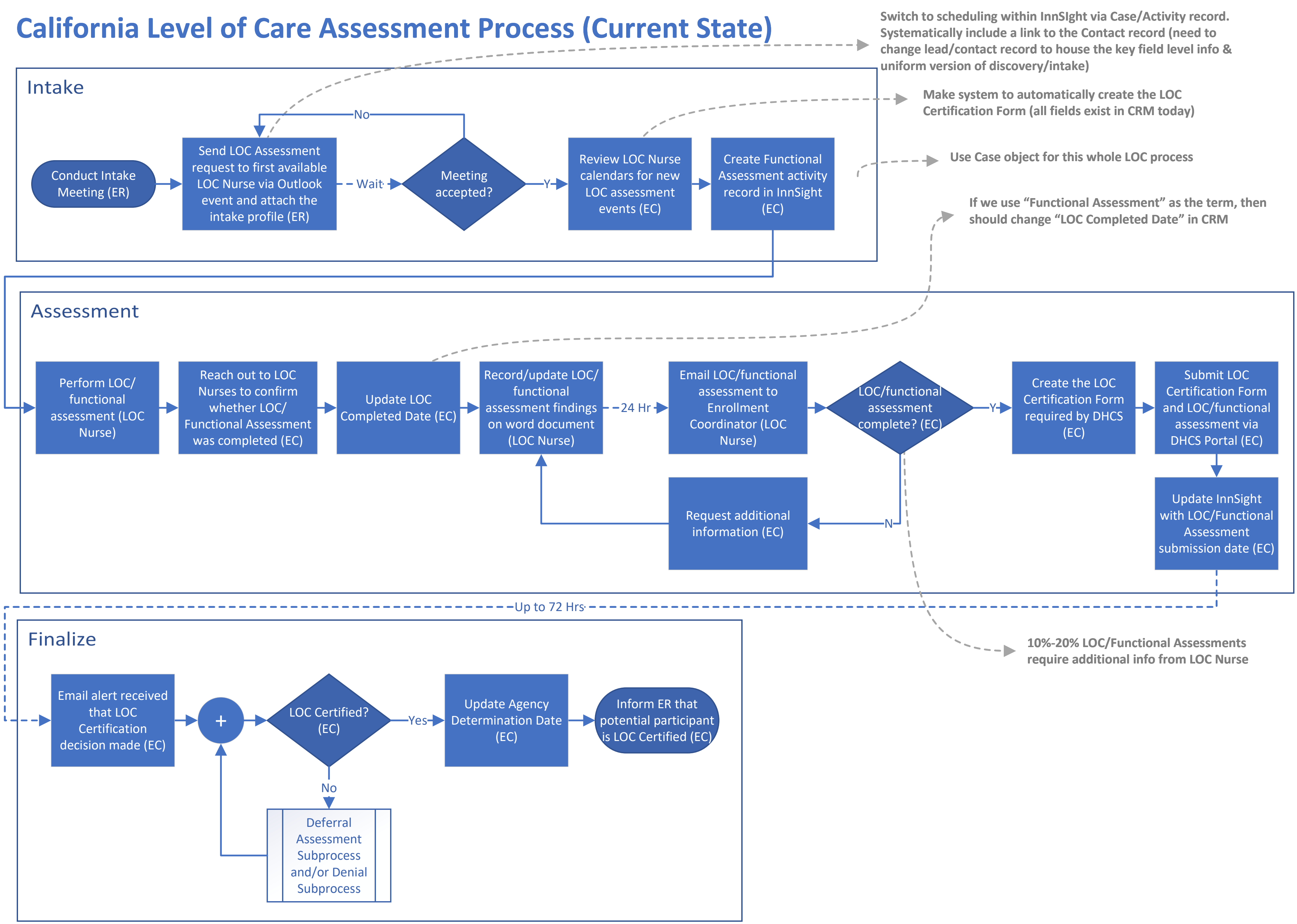



Put this role into the field

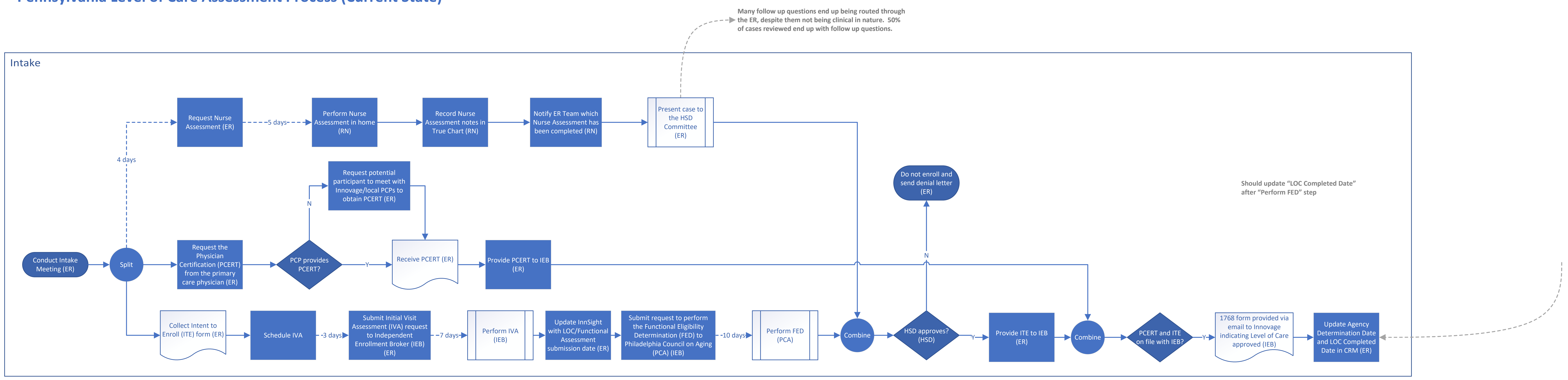
# New Mexico Level of Care Assessment Process (Current State)



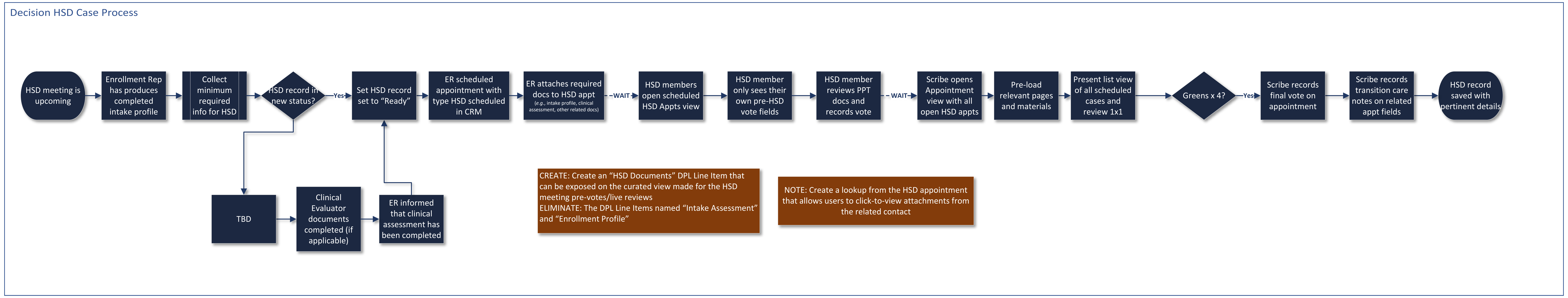
# California Level of Care Assessment Process (Current State)



# Pennsylvania Level of Care Assessment Process (Current State)



# Florida Level of Care Assessment Process (Current State)




**Meeting Roles**

- **Leader** *(def.)* is responsible for driving the meeting agenda to ensure all cases are reviewed timely. They will often be the person who calls for the official vote after reviewing case details. Typically, this person is the center director.
- **Organizer** *(def.)* is responsible for scheduling both recurring and ad hoc HSD meetings. Typically, this person is the enrollment manager or other persons acting in that function within the sales team.
- **Scribe** *(def.)* is responsible for preparing for the HSD meeting by having all cases and relevant materials ready to be shared on screen before the start of the meeting. Responsible for recording all pertinent information (e.g., HSD member votes, transition notes, unique medical needs, pre-enrollment safety remediation steps, etc.) in CRM while sharing their screen.

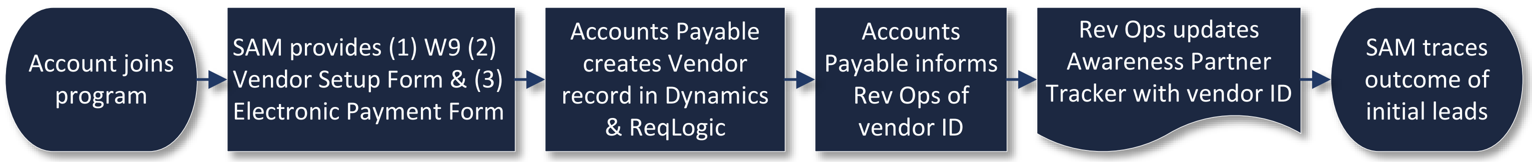
**HSD Roles**

- XX
- XX

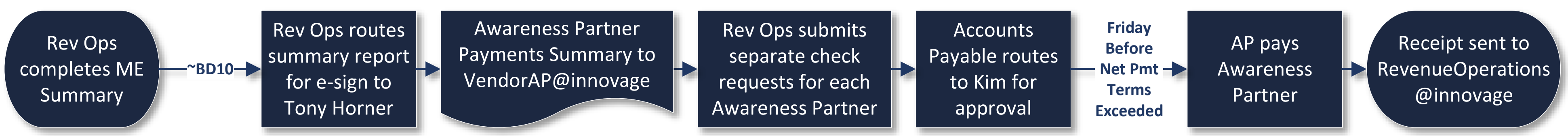
**Parking Lot**

- @Cody can we present an attachment that can be click-to-open inline on a view (either from appointments or from HSD)
- @Cody create an applet that allows all HSD participants to access CRM. Need to figure out all what roles, titles, etc. would need to be included. Also, what is the relative cost of adding all people with the lightest CRM license.

## Accounts Payable Onboard Vendor Process



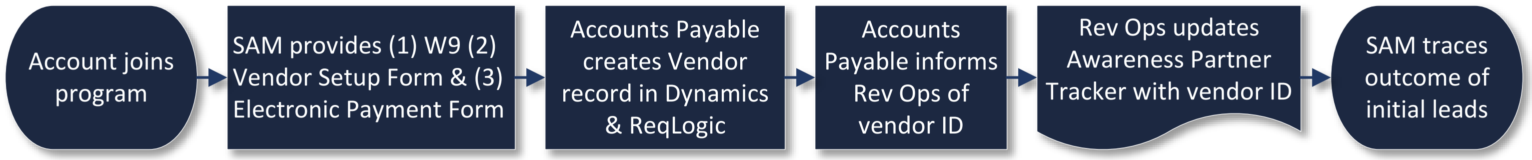

## Pay Awareness Partners Process



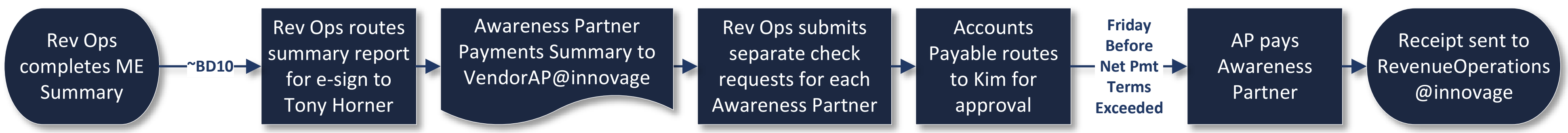

Required Info for GL Entry:

1. Company Code
2. Account
3. Department Code
4. Location Code
5. Vendor Name Subtotal

## Accounts Payable Onboard Vendor Process

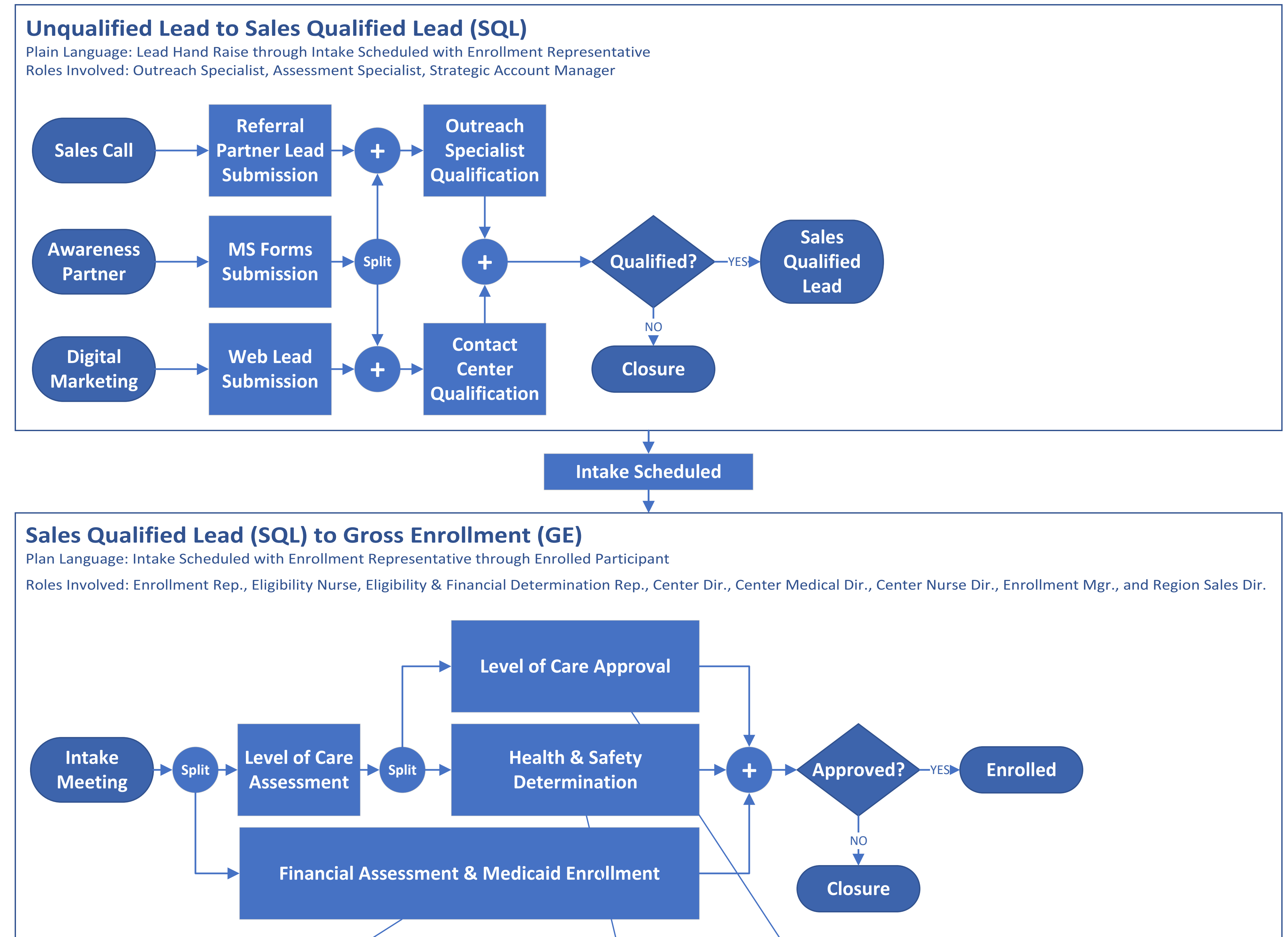



## Pay Awareness Partners Process




Required Info for GL Entry:
1. Company Code
2. Account
3. Department Code
4. Location Code
5. Vendor Name Subtotal

# Participant Enrollment Process




MediCal? No, Medi-County… Can only confirm county details when we need a ZIP match to confirm MCAID benefits are applicable for PACE benefits. Requires change of address request to get the MCAID benefits in place pre-first cutoff.

Defects here look like requests for more information or documents related to financial information that is discovered by the state during the MCAID approval requests, but we did not know about ahead of time. There are solutions on market, Equifax specifically, that can pull bank account info proactively to ensure we submit complete a whole financial records to the state.

If a PPT has In Home Supportive Services and are a second cutoff enrollment the state will attempt to enroll manually and then inform us (after the 1st of the month and when we think it was in the bag) that a manual phone call by the participant must be made to the state in-order to manually remove the IHSS waiver supported care. This is often called the 'paid care giver' programs.

Estimate a 75% first pass yield.

Biggest lever: In Depth Financial History

Policy adherence; Policy Adherence; Process Consistency; More Details in PPT Profile

Defects here look like pended and held cases (internal policy) -OR- denied cases (external policy)

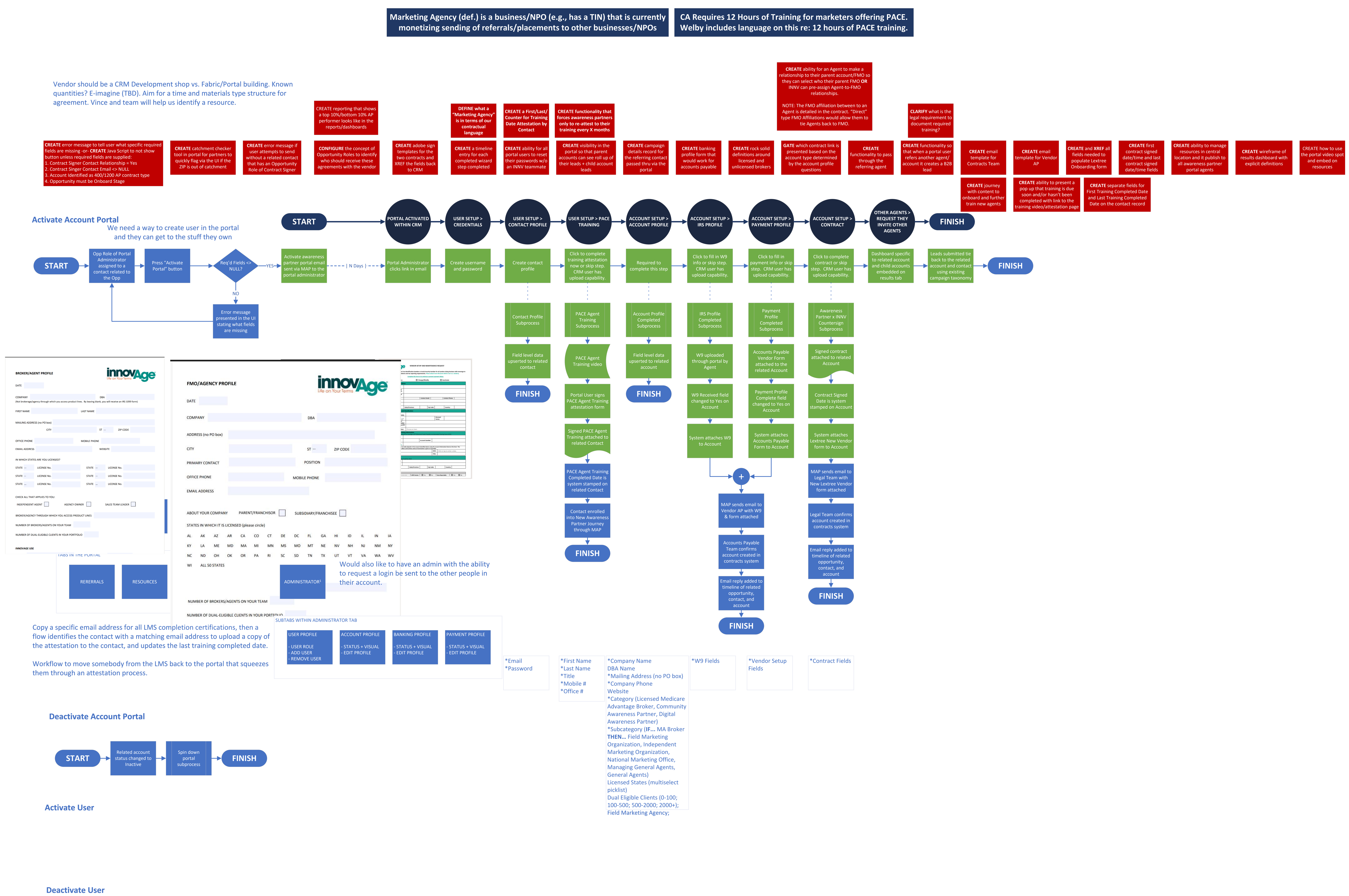
Estimate a 75% first pass yield.

Biggest lever: Consistent usage of pended and held PPT policy

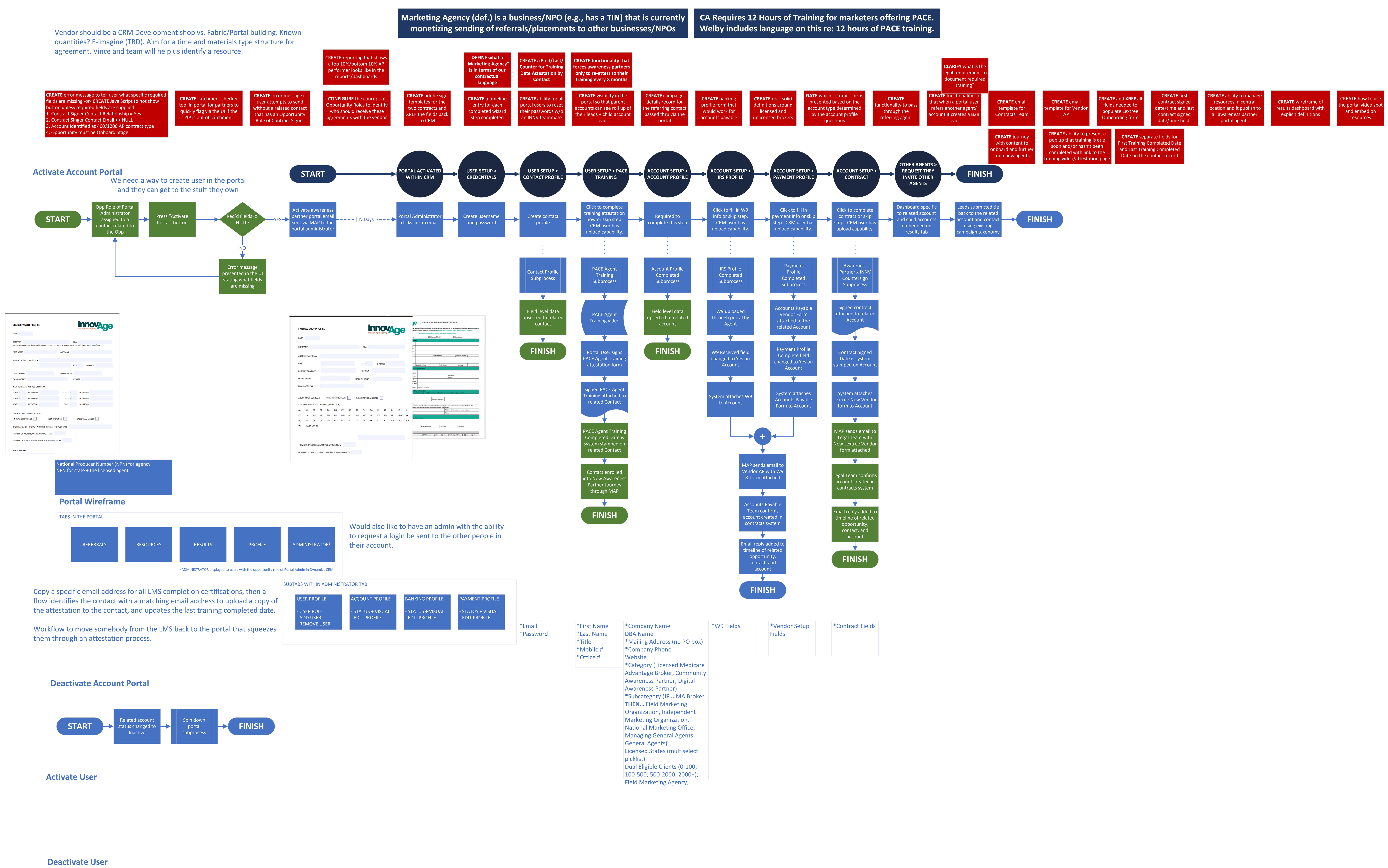
Defects here look like requests for more information based on unclear info provided in documentation -OR- provide more justification on why this PPT is nursing facility level of care.

Estimate a 80-90% first pass yield.

Biggest lever: Quality Detailed Write Ups That Get to Yes



Marketing Agency (def.) is a business/NPO (e.g., has a TIN) that is currently monetizing sending of referrals/placements to other businesses/NPOs
CA Requires 12 Hours of Training for marketers offering PACE. Welby includes language on this re: 12 hours of PACE training.
Vendor should be a CRM Development shop vs. Fabric/Portal building. Known quantities? E-imagine (TBD). Aim for a time and materials type structure for agreement. Vince and team will help us identify a resource.
CREATE error message to tell user what specific required fields are missing -or- CREATE Java Script to not show button unless required fields are supplied:
1. Contract Signer Contact Relationship = Yes
2. Contract Singer Contact Email <> NULL
3. Account Identified as 400/1200 AP contract type
4. Opportunity must be Onboard Stage
CREATE catchment checker tool in portal for partners to quickly flag via the UI if the ZIP is out of catchment
CREATE error message if user attempts to send without a related contact that has an Opportunity Role of Contract Signer
CREATE reporting that shows a top 10%/bottom 10% AP performer looks like in the reports/dashboards
CONFIGURE the concept of Opportunity Roles to identify who should receive these agreements with the vendor
CREATE adobe sign templates for the two contracts and XREF the fields back to CRM
DEFINE what a "Marketing Agency" is in terms of our contractual language
CREATE a timeline entry for each completed wizard step completed
CREATE a First/Last/ Counter for Training Date Attestation by Contact
CREATE ability for all portal users to reset their passwords w/o an INNV teammate
CREATE functionality that forces awareness partners only to re-attest to their training every X months
CREATE visibility in the portal so that parent accounts can see roll up of their leads + child account leads
CREATE campaign details record for the referring contact passed thru via the portal
CREATE banking profile form that would work for accounts payable
CREATE rock solid definitions around licensed and unlicensed brokers
CREATE ability for an Agent to make a relationship to their parent account/FMO so they can select who their parent FMO OR INNV can pre-assign Agent-to-FMO relationships.
NOTE: The FMO affiliation between to an Agent is detailed in the contract. "Direct" type FMO Affiliations would allow them to tie Agents back to FMO.
GATE which contract link is presented based on the account type determined by the account profile questions
CREATE functionality to pass through the referring agent
CLARIFY what is the legal requirement to document required training?
CREATE functionality so that when a portal user refers another agent/ account it creates a B2B lead
CREATE email template for Contracts Team
CREATE email template for Vendor AP
CREATE and XREF all fields needed to populate Lextree Onboarding form
CREATE first contract signed date/time and last contract signed date/time fields
CREATE ability to manage resources in central location and it publish to all awareness partner portal agents
CREATE wireframe of results dashboard with explicit definitions
CREATE how to use the portal video spot and embed on resources
CREATE journey with content to onboard and further train new agents
CREATE ability to present a pop up that training is due soon and/or hasn't been completed with link to the training video/attestation page
CREATE separate fields for First Training Completed Date and Last Training Completed Date on the contact record
Activate Account Portal
We need a way to create user in the portal and they can get to the stuff they own
START
Opp Role of Portal Administrator assigned to a contact related to the Opp
Press "Activate Portal" button
Req'd Fields <> NULL?
YES
NO
Error message presented in the UI stating what fields are missing
Activate awareness partner portal email sent via MAP to the portal administrator
| N Days |
START
PORTAL ACTIVATED WITHIN CRM
USER SETUP > CREDENTIALS
USER SETUP > CONTACT PROFILE
USER SETUP > PACE TRAINING
ACCOUNT SETUP > ACCOUNT PROFILE
ACCOUNT SETUP > IRS PROFILE
ACCOUNT SETUP > PAYMENT PROFILE
ACCOUNT SETUP > CONTRACT
OTHER AGENTS > REQUEST THEY INVITE OTHER AGENTS
FINISH
Portal Administrator clicks link in email
Create username and password
Create contact profile
Click to complete training attestation now or skip step. CRM user has upload capability.
Required to complete this step
Click to fill in W9 info or skip step. CRM user has upload capability.
Click to fill in payment info or skip step. CRM user has upload capability.
Click to complete contract or skip step. CRM user has upload capability.
Dashboard specific to related account and child accounts embedded on results tab
Leads submitted tie back to the related account and contact using existing campaign taxonomy
FINISH
Contact Profile Subprocess
Field level data upserted to related contact
FINISH
PACE Agent Training Subprocess
PACE Agent Training video
Portal User signs PACE Agent Training attestation form
Signed PACE Agent Training attached to related Contact
PACE Agent Training Completed Date is system stamped on related Contact
Contact enrolled into New Awareness Partner Journey through MAP
FINISH
Account Profile Completed Subprocess
Field level data upserted to related account
FINISH
IRS Profile Completed Subprocess
W9 uploaded through portal by Agent
W9 Received field changed to Yes on Account
System attaches W9 to Account
Payment Profile Completed Subprocess
Accounts Payable Vendor Form attached to the related Account
Payment Profile Complete field changed to Yes on Account
System attaches Accounts Payable Form to Account
+
MAP sends email to Vendor AP with W9 & form attached
Accounts Payable Team confirms account created in contracts system
Email reply added to timeline of related opportunity, contact, and account
FINISH
Awareness Partner x INNV Countersign Subprocess
Signed contract attached to related Account
Contract Signed Date is system stamped on Account
System attaches Lextree New Vendor form to Account
MAP sends email to Legal Team with New Lextree Vendor form attached
Legal Team confirms account created in contracts system
Email reply added to timeline of related opportunity, contact, and account
FINISH
BROKER/AGENT PROFILE
innovAge
FMO/AGENCY PROFILE
innovAge
DATE
COMPANY
DBA
ADDRESS (no PO box)
CITY
ST
ZIP CODE
PRIMARY CONTACT
POSITION
OFFICE PHONE
MOBILE PHONE
EMAIL ADDRESS
CHECK ALL THAT APPLIES TO YOU:
INDEPENDENT AGENT
AGENCY OWNER
SALES TEAM LEADER
BROKER/AGENCY THROUGH WHICH YOU ACCESS PRODUCT LINES
NUMBER OF BROKERS/AGENTS ON YOUR TEAM
NUMBER OF DUAL-ELIGIBLE CLIENTS IN YOUR PORTFOLIO
INNOVAGE USE
ABOUT YOUR COMPANY
PARENT/FRANCHISOR
SUBSIDIARY/FRANCHISEE
STATES IN WHICH IT IS LICENSED (please circle)
AL AK AZ AR CA CO CT DE DC FL GA HI ID IL IN IA
KY LA ME MD MA MI MN MS MO MT NE NV NH NJ NM NY
NC ND OH OK OR PA RI SC SD TN TX UT VT VA WA WV
WI ALL 50 STATES
TABS IN THE PORTAL
RERERRALS
RESOURCES
ADMINISTRATOR[1]
Would also like to have an admin with the ability to request a login be sent to the other people in their account.
SUBTABS WITHIN ADMINISTRATOR TAB
USER PROFILE
- USER ROLE
- ADD USER
- REMOVE USER
ACCOUNT PROFILE
- STATUS + VISUAL
- EDIT PROFILE
BANKING PROFILE
- STATUS + VISUAL
- EDIT PROFILE
PAYMENT PROFILE
- STATUS + VISUAL
- EDIT PROFILE
Copy a specific email address for all LMS completion certifications, then a flow identifies the contact with a matching email address to upload a copy of the attestation to the contact, and updates the last training completed date.
Workflow to move somebody from the LMS back to the portal that squeezes them through an attestation process.
*Email
*Password
*First Name
*Last Name
*Title
*Mobile #
*Office #
*Company Name
DBA Name
*Mailing Address (no PO box)
*Company Phone
Website
*Category (Licensed Medicare Advantage Broker, Community Awareness Partner, Digital Awareness Partner)
*Subcategory (IF... MA Broker THEN... Field Marketing Organization, Independent Marketing Organization, National Marketing Office, Managing General Agents, General Agents)
Licensed States (multiselect picklist)
Dual Eligible Clients (0-100; 100-500; 500-2000; 2000+);
Field Marketing Agency;
*W9 Fields
*Vendor Setup Fields
*Contract Fields
Deactivate Account Portal
START
Related account status changed to Inactive
Spin down portal subprocess
FINISH
Activate User
Deactivate User



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ACCOUNT SETUP > ACCOUNT PROFILE
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ACCOUNT SETUP > PAYMENT PROFILE
ACCOUNT SETUP > CONTRACT
OTHER AGENTS > REQUEST THEY INVITE OTHER AGENTS
FINISH
Portal Administrator clicks link in email
Create username and password
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Click to complete training attestation now or skip step. CRM user has upload capability.
Required to complete this step
Click to fill in W9 info or skip step. CRM user has upload capability.
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MAP sends email to Legal Team with New Lextree Vendor form attached
Legal Team confirms account created in contracts system
Email reply added to timeline of related opportunity, contact, and account
FINISH
National Producer Number (NPN) for agency
NPN for state + the licensed agent
Portal Wireframe
TABS IN THE PORTAL
RERERRALS
RESOURCES
RESULTS
PROFILE
ADMINISTRATOR[1]
[1]ADMINISTRATOR displayed to users with the opportunity role of Portal Admin in Dynamics CRM
Would also like to have an admin with the ability to request a login be sent to the other people in their account.
Copy a specific email address for all LMS completion certifications, then a flow identifies the contact with a matching email address to upload a copy of the attestation to the contact, and updates the last training completed date.
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SUBTABS WITHIN ADMINISTRATOR TAB
USER PROFILE - USER ROLE - ADD USER - REMOVE USER
ACCOUNT PROFILE - STATUS + VISUAL - EDIT PROFILE
BANKING PROFILE - STATUS + VISUAL - EDIT PROFILE
PAYMENT PROFILE - STATUS + VISUAL - EDIT PROFILE
*Email *Password
*First Name *Last Name *Title *Mobile # *Office #
*Company Name DBA Name *Mailing Address (no PO box) *Company Phone Website *Category (Licensed Medicare Advantage Broker, Community Awareness Partner, Digital Awareness Partner) *Subcategory (IF... MA Broker THEN... Field Marketing Organization, Independent Marketing Organization, National Marketing Office, Managing General Agents, General Agents) Licensed States (multiselect picklist) Dual Eligible Clients (0-100; 100-500; 500-2000; 2000+); Field Marketing Agency;
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Activate User
Deactivate User