Client Onboarding Automation

Gabriel, Karim, Michael

Team Member Information

Gabriel Chandler

Karim Mahfouz

Michael Knudsen

Client Information

Documentor - Electronic visitation verification

Documentor is a company that provides services to care givers, while integrating with state requirements.

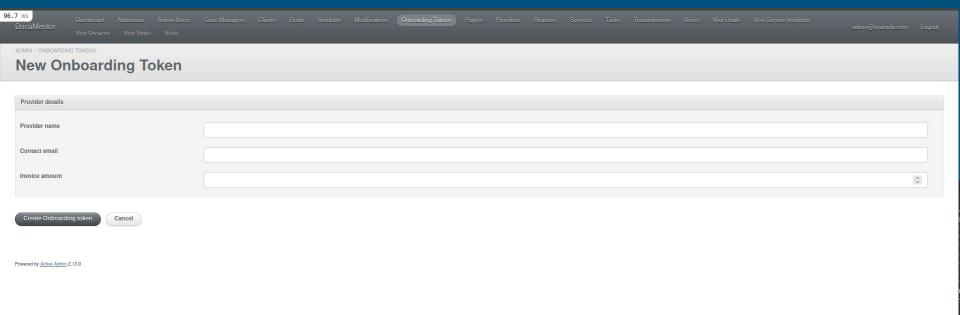Their services help providers track their time, set goals and makes complying with state regulations easier.

Mentor Feedback

Our mentor is very happy with how the project turned out and glad that we made it through the year. He offered some advice for the project closure and handoff. He also went through our tests and was happy with the changes we made to better represent code coverage and test our UI.

Client Feedback

Our Client was very happy with our fifth iteration and confirmed that this is going to save him so much time in the end and is so excited to implement it into live as soon as possible

Create onboarding token page

DocuMentor

Dashboard Addresses Admin Users Case Managers Clients Goals Incidents Modifications Onboarding Tokens Payers Providers Reasons Services Tasks Transmissions Users Visit Goals Visit Service Incidents
Visit Services Visit Tasks Visits

admin@example.com   Logout

ADMIN / ONBOARDING TOKENS /

New Onboarding Token

Provider details

Provider name

Contact email

Invoice amount

[Create Onboarding token] [Cancel]

Onboarding Token created successfully

ADMIN / ONBOARDING TOKENS /

kmahfouz@bsu.edu

Edit Onboarding Token   Delete Onboarding Token   Invite link   Quickbooks link

Onboarding token was successfully created.

Onboarding Token Details

PROVIDER NAME	ad
CONTACT EMAIL	kmahfouz@bsu.edu
CREATED AT	April 20, 2023 00:37
UPDATED AT	April 20, 2023 00:37
PROVIDER	0439be84-5155-4c99-928a-bb0cf212b00a
EMAIL	kmahfouz@bsu.edu
INVITATION TOKEN	e9d72a41ba5df59db231d3993b178d173d7e6615e9a7ad12a6d80c9fdafcc211
INVITATION CREATED AT	April 20, 2023 00:37
INVITATION SENT AT	April 20, 2023 00:37
INVITATION ACCEPTED AT	EMPTY
INVITATION LIMIT	EMPTY
INVITED BY TYPE	EMPTY
INVITED BY	EMPTY
STREET	EMPTY
CITY	EMPTY
STATE	EMPTY
ZIP	EMPTY
COUNTRY	EMPTY
FIRST NAME	EMPTY
LAST NAME	EMPTY
INVOICE	EMPTY
INVOICE AMOUNT	0045

Invite Email

You've been invited to DocuMentor! Inbox ×

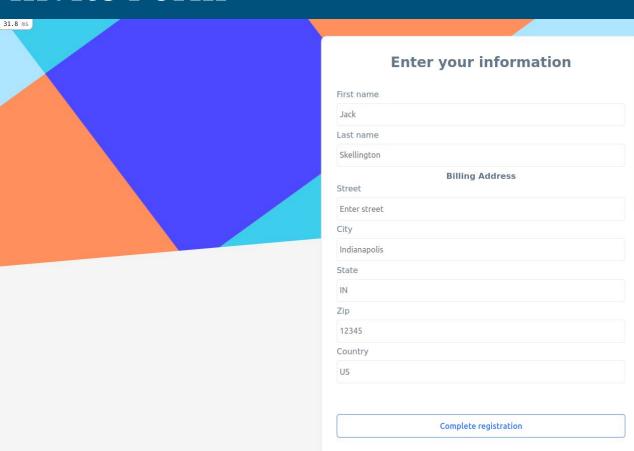**DocuMentor** info@yourdocumentor.com via mg.appdevproject.com

to me ▼

Hello,

Someone has invited you to join their team on DocuMentor. Accept the invitation through the link below.
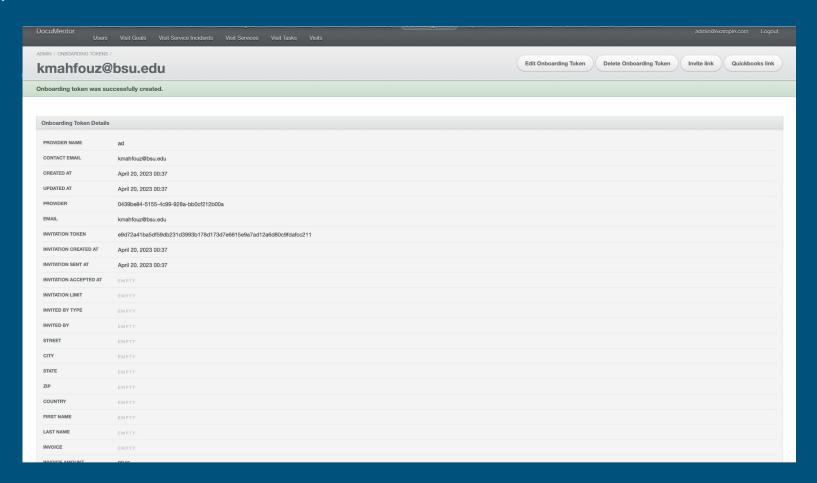
Accept invitation

If you don't want to accept the invitation, please ignore this email. Your account won't be created until you access the link above and set your password.
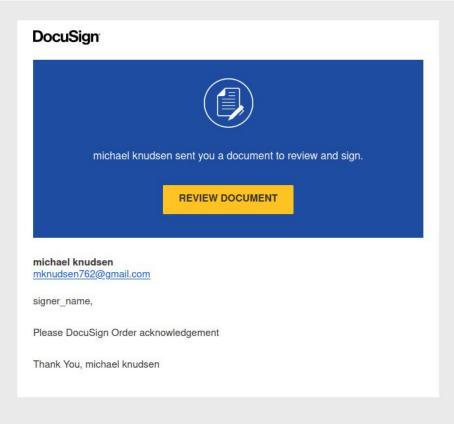
↩ Reply   ↗ Forward

Invite Form

31.8 ms

Enter your information

First name

Jack

Last name

Skellington

Billing Address

Street

Enter street

City

Indianapolis

State

IN

Zip

12345

Country

US

Complete registration

Quickbooks Button

ADMIN / ONBOARDING TOKENS /

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LAST NAME	EMPTY
INVOICE	EMPTY
INVOICE AMOUNT	

Sign Docusign Document

Iteration 5 Features

Todo 2

⊙ ClientOnboardingAutomation #10 •••

NF4 - Create Ruby jobs to automatically check for payment processing

⊙ ClientOnboardingAutomation #11

FR3 - Make status variable update throughout the onboarding process

In Progress 0

Done 8

⊘ ClientOnboardingAutomation #9

FR7 - implement docusign functionality

⊘ ClientOnboardingAutomation #1

FR1 - Automatically create Support account - BR1 - HIGH

⊘ ClientOnboardingAutomation #2

FR2 - Automatically create initial account - BR1 - HIGH

⊘ ClientOnboardingAutomation #3

FR6 - customer can input their own information for new provider and initial account - BR1 - HIGH

⊘ ClientOnboardingAutomation #4

FR7 - functioning frontend for customer to use - BR1 - HIGH

⊘ ClientOnboardingAutomation #6

+ Add item

Project's Overall Benefit

Before we started this project, our client William had to do so many different processes that were redundant and wasted a lot of time for someone who needs to be out pursuing more providers to onboard. Now he can do what used to take him on average 10-15 minutes, down to a 3-5 minutes process because many unnecessary manual steps have now been made automatic and allow for him to onboard more people in a more timely manner. This will also help him bring in more money for Documentor and make his job easier.

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