## Merchant Name *(AE to fill)* Alaffia Health

## <https://app.hubspot.com/contacts/43610657/record/0-3/33176016401/> Implementation POC: Jeff *(IM to fill)* CX POC: *[IMP to Add]*

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| Notes Sections   *(AE to fill if they have, Implementation to be completion DRI on handoff)*   * Info on how merchant bills * Upfront platform fee plus claims usage data * claims review process:   + customer sends alaffia list of insurance claims to review   + alaffia finds customer savings in claims and lists them for review   + customer signs off on claim review and realized savings   + alaffia then invoices customer for:     1. Pre-Payment Claim Reviews: 30% of Realized Savings     2. Post-Payment Claim Reviews: 35% of Realized Savings     3. Client shall only pay a Service Fee when prevented (on a pre-payment basis) and/or retracted overpayments (on a post-payment basis) have occurred. * Some parent/child relationships with healthcare companies and their subsidiaries   1) What is the merchant temperament? * Straightforward, metrics driven   3) What are the Tabs features that the key POC cares about?  QBO connection, reducing DSO (collections), usage calculations on invoices |
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### Billing model *(Entire Section: Implementation to fill section)*

* Are there unique things about the customer creation process for this merchant?
* Information on how merchant bills
* How contract is broken up
* One off things to know about the merchant

### Contract Processing Steps *(Entire Section: Implementation/Success to fill Post-Go Live)*

* **General**
  + Most contracts will have usage fees that are a % of realized savings
    - Ensure that if there are multiple BTs with a % of savings, each has a unique event (events should exist but if they do not, try to match the item name exactly)
  + If implementation is comprised of multiple BTs, process all individually
  + Process discounts as a separate negative BT unless it is for a specific item, then use in-line discounting
* **Ignore**
  + Any “Administrative Allowance” %’s
* **Service Start Date:** order effective date
* **Months of Service:**
  + Found in “Term/Project Schedule” / “Initial Term”
  + For implementation, assume 2 months
* **Billing Start Date:** same as service start date
* **Item Name:** 
  + Use unique names if BTs are similar
  + If item name is too generic, try to use a more specific name
* **Frequency**
  + Usage BTs will be monthly in arrears unless stated otherwise
  + For implementation, assume 2 months
* **Net Terms**
  + Look for a similar clause: “All amounts due hereunder shall be paid in full within thirty (30) calendar days following receipt of invoice in US dollars.“
  + Otherwise default to 30 days
* **Example contracts**
  + [Regular 1 BT Bill Review service fee](https://garage.tabsplatform.com/prod/contracts/20ec090d-d0c1-41c5-98f5-bc6016b293f9/preview)
  + [4 different types of BTs with the same % of savings](https://garage.tabsplatform.com/prod/contracts/9b81270d-cef4-436a-88d9-0799dc2a421e/preview)
  + [Implementation fee + tiered service fee and rush service fee](https://garage.tabsplatform.com/prod/contracts/91a4abcb-bf96-4e6a-a619-9d55897a8c95/preview)
* **Minimum commitment**
  + [Example](https://garage.tabsplatform.com/prod/contracts/89369f68-66ce-4613-9b10-606b70c2312f/usage)
* **Integration Items**
  + [TBD]

1. Specifics processing things the merchant has requested that may differ by contract (e.g. always back-date invoice date to final day of the month)
2. Default Service Term
   1. If None Listed, Ops Default is 1 Year
3. Default Net Payment Terms
   1. If None, Ops Default is 0
4. Default Billing Frequency
   1. If None Listed, Ops Default is Monthly
5. How do we handle taxes as a line item?
   1. If None Listed, Ops Default is every tax line item becomes a BT

### Events Processing (if necessary) *(Entire Section: Implementation/Success to fill Post-Go Live)*

* Any important information on events billing

Integration Items Processing (if necessary)  
*(Entire Section: Implementation/Success to fill Post-Go Live)*

* What are the instructions for assigning integration items?
* Example: All Statsig integrations items should be labeled as “Sales”
* Example: All “Pinata” integration items should be labeled as “Software Subscription Bundle” unless otherwise noted by Merchant

Post Processing Communications (if necessary)  
*(Entire Section: Implementation/Success to fill Post-Go Live)*

* Does the Ops Team need to notify anyone on the team re: completion of processing batches in Implementation or Active phase?
* Who needs to be notified and when?
  + Example:
    - Who: Customer Success [Azmat Aziz] needs to be notified
    - Where: Messari internal merchant channel
    - When: contracts are processed [Merchant Phase: Active]

### Customer Information *(Entire Section: Implementation/Success to fill Post-Go Live)*

* Any important information on specifics customers of this merchant
  + Special memo’s certain invoices require
  + Invoice changes due to merchant/customer relationship

### Feature Requests *(AE to fill for all requests prior to Imp handoff, Imp to fill prior to go-live/Success to fill to fill Post-Go Live)*

* FR 1
  + What is it
  + Why it's important
  + Urgency

### Merchant Calls *(AE to fill for all videos prior to Imp involvement, Imp to fill prior to go-live/Success to fill to fill Post-Go Live)*

* Loom recording links by dates