



## Mend New-Hire Schedule & Checklist

### Welcome to the Mend Family!

We're glad you're here! Whether you are in a sales, support, implementation, or development role, this checklist is intended to guide you through your first few days to lay the groundwork for the service we provide.

The schedule and checklist below is a guideline, and may be adjusted by your supervisor to accommodate for other training needs specific to your role, or to better fit your team's schedule.

DAY 1 - WELCOME		
Training or Task	Notes	Completed
Workstation security configuration	Typically configured before you receive your computer, but if you're not sure, please reach out to your supervisor to confirm!  We may have you go through a few checklist items with a member of our Information Security team.	✓
HIPAA Training	Hosted at <a href="https://mendtraining.talentlms.com">mendtraining.talentlms.com</a> .  This must be completed before you receive access to our internal systems.	
Intro to Mend	Hosted at <a href="https://mendtraining.talentlms.com">mendtraining.talentlms.com</a> .	
Access Setup	Please refer to the specific <a href="#">access setup checklists</a> below.	
Supervisor Check-in	Check in with your supervisor to discuss your progress and next steps	
If you're in our Baldwin Park office...		
Set up your space	Monitors, ports, power strips, keyboard, mouse, headphones, etc.	
Office Access	Key fob, backdoor key if applicable	
Office Tour	Bathrooms, kitchen, coffee, soda machine	

## DAY 2 - PRODUCT CERTIFICATION

Training or Task	Notes	Completed
Mend Now Certification	Hosted at <a href="https://mendtraining.talentlms.com">mendtraining.talentlms.com</a>	
Mend Pro Certification	Hosted at <a href="https://mendtraining.talentlms.com">mendtraining.talentlms.com</a>	
Paperless Intake Certification	Hosted at <a href="https://mendtraining.talentlms.com">mendtraining.talentlms.com</a>	
Platform Practice	Please refer to the <a href="#">platform practice guide</a> below.	
Supervisor Check-in	Check in with your supervisor to discuss your progress and next steps	

## DAY 3 - ROLE APPLICATION

Training or Task	Notes	Completed
Product certification or platform practice overflow	What do you still need to learn or practice today?	
Role-Specific Training	If applicable to your role, you may have additional courses assigned at <a href="https://mendtraining.talentlms.com">mendtraining.talentlms.com</a>	
Role-Specific Shadowing	If applicable, your supervisor may ask you to shadow a member of your team	
Additional Role-Specific Workstation Setup	If applicable, you may need to install and set up tools to configure your local development environment	
Supervisor Check-in	Check in with your supervisor to discuss your progress and next steps	





## Access Setup Checklists

The following checklists are role-specific, and may not be exhaustive. Please coordinate with your supervisor to confirm what's needed, and to grant you appropriate access.

ACCESS SETUP - ALL TEAMS		
Application	Notes	Completed
Gmail	Typically completed prior to your first day.  Ask your supervisor how your department configures signature and additional settings.	
Email Distribution Lists	We will add you to the <a href="mailto:all@mendfamily.com">all@mendfamily.com</a> distribution list when you complete HIPAA training. Your supervisor may also request permission from InfoSec to add you to role-specific distribution lists.	
Mend Family Calendar		
Google Drive Mend Folder	Your supervisor may also request permission from InfoSec to add you to role-specific Drive folders.	
Slack	Subscribe to #general and #insperity for company-wide announcements and HR/Benefits updates.  Your supervisor will help add you to the appropriate channels and group tags for your role.	
***Mend (Production Environment)***	<p>Click <a href="#">here</a> to create a patient account using your <a href="mailto:@mendfamily.com">@mendfamily.com</a> email address: <a href="https://portal.mendfamily.com/signup/new-patient/2">https://portal.mendfamily.com/signup/new-patient/2</a></p> <p>Then, click your name to open your Patient page. Copy the URL - the digits after /patient/ are your User ID. Provide your User ID to your supervisor.</p> <p>Then, your supervisor will send an email to <a href="mailto:infosec@mendfamily.com">infosec@mendfamily.com</a> containing:</p> <ul style="list-style-type: none"><li>• Your user name (<a href="mailto:name@mendfamily.com">name@mendfamily.com</a>)</li><li>• Supervisor name</li><li>• Resource you need to access (Mend Production environment)</li><li>• Role necessary to perform your job duties</li></ul>	

	<ul style="list-style-type: none"> <li>Reason why you need access</li> </ul> <p>You should receive confirmation of appropriate access within 24 hours.</p>	
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ACCESS SETUP - TECH DEVELOPMENT		
Application	Notes	Completed
Mend Staging Environment	<p>Click here to create a patient account using your @mendfamily.com email address:  <a href="https://portal-stage.mendvip.com/signup/new-patient/2">https://portal-stage.mendvip.com/signup/new-patient/2</a></p> <p>Then, click your name to open your Patient page. Copy the URL - the digits after /patient/ are your User ID. Provide your User ID to your supervisor.</p> <p>Then, your supervisor will send an email to <a href="mailto:infosec@mendfamily.com">infosec@mendfamily.com</a> containing:</p> <ul style="list-style-type: none"> <li>Your user name (<a href="mailto:name@mendfamily.com">name@mendfamily.com</a>)</li> <li>Supervisor name</li> <li>Resource you need to access (Mend Staging environment)</li> <li>Role necessary to perform your job duties</li> <li>Reason why you need access</li> </ul> <p>You should receive confirmation of appropriate access within 24 hours.</p> <p>You may also need to provide your email address and mobile phone number to the dev team so you can be whitelisted for notifications in the staging environment.</p>	
Dashlane	<p>Your supervisor must request permission from InfoSec.</p> <p>*Note: no permission is needed to store personal passwords in Dashlane.</p>	
GitHub		
Jira		
PHP Storm		
Remote Access VPN		
Confluence		



ACCESS SETUP - SUPPORT / QA		
Application	Notes	Completed
Mend Staging Environment	<p>Click here to create a patient account using your @mendfamily.com email address:  <a href="https://portal-stage.mendvip.com/signup/new-patient/2">https://portal-stage.mendvip.com/signup/new-patient/2</a></p> <p>Then, click your name to open your Patient page. Copy the URL - the digits after /patient/ are your User ID. Provide your User ID to your supervisor.</p> <p>Then, your supervisor will send an email to <a href="mailto:infosec@mendfamily.com">infosec@mendfamily.com</a> containing:</p> <ul style="list-style-type: none"> <li>• Your user name (<a href="mailto:name@mendfamily.com">name@mendfamily.com</a>)</li> <li>• Supervisor name</li> <li>• Resource you need to access (Mend Staging environment)</li> <li>• Role necessary to perform your job duties</li> <li>• Reason why you need access</li> </ul> <p>You should receive confirmation of appropriate access within 24 hours.</p> <p>You may also need to provide your email address and mobile phone number to the dev team so you can be whitelisted for notifications in the staging environment.</p>	
Email Archive	Your supervisor must request permission from InfoSec.	
Zendesk	Your supervisor must request permission from InfoSec.	
Jira		
Dashlane	<p>Your supervisor must request permission from InfoSec.</p> <p>*Note: no permission is needed to store personal passwords in Dashlane.</p>	
SessionStack	Your supervisor must request permission from InfoSec.	
OpenTok Inspector		
Twilio	Your supervisor must request permission from InfoSec.	

Phone or Softphone		
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ACCESS SETUP - IMPLEMENTATIONS		
Application	Notes	Completed
Mend Staging Environment	<p>Click here to create a patient account using your @mendfamily.com email address:  <a href="https://portal-stage.mendvip.com/signup/new-patient/2">https://portal-stage.mendvip.com/signup/new-patient/2</a></p> <p>Then, click your name to open your Patient page. Copy the URL - the digits after /patient/ are your User ID. Provide your User ID to your supervisor.</p> <p>Then, your supervisor will send an email to <a href="mailto:infosec@mendfamily.com">infosec@mendfamily.com</a> containing:</p> <ul style="list-style-type: none"> <li>• Your user name (<a href="mailto:name@mendfamily.com">name@mendfamily.com</a>)</li> <li>• Supervisor name</li> <li>• Resource you need to access (Mend Staging environment)</li> <li>• Role necessary to perform your job duties</li> <li>• Reason why you need access</li> </ul> <p>You should receive confirmation of appropriate access within 24 hours.</p> <p>You may also need to provide your email address and mobile phone number to the dev team so you can be whitelisted for notifications in the staging environment.</p>	
Trello		
Jira		
Basecamp		
Salesforce		
Calendly		

ACCESS SETUP - SALES		
Application	Notes	Completed
Salesforce		
Calendly		
Phone or Softphone		

## Platform Practice

The following scenarios are suggested practice tasks based on common user workflows.

Please use the Mend Training Sandbox Org in production to explore and practice the features addressed in the Product Certification courses. If you have difficulty completing any of these tasks, take a look in the Mend Knowledge Base to see if your questions are answered. If you continue to have difficulty, please take note of where you are stuck and bring them up with your supervisor when you next touch base.

1. Create a new provider and give them virtual availability for Mondays and Fridays
2. Invite an anonymous user to connect for an immediate video session.
3. Schedule a primary care appointment for a child.
4. Manually assign an assessment to a patient.
5. Review and download a completed assessment.
6. Create and preview a new bulk notification template
  - o Please do not actually send your notification - some "patient" email addresses in this org belong to staff and providers who have used this org for training practice.
7. Schedule an appointment that will use Kiosk Mode
  - o If you're logged in with a provider or staff member account, you can also practice initiating a Kiosk Mode appointment, but this is restricted from Mend Admins





8. Change a patient's notification settings
9. Set up a recurring group appointment

1. Log out, then create a new test patient account in Mend Demo:

- To create a unique email address for your patient that still routes notifications to your inbox, add a “+” and any text you’d like before the @mendfamily.com in your email address.
- For example, if your email address is [Newhire@mendfamily.com](mailto:Newhire@mendfamily.com), you may use [Newhire+testpatient@mendfamily.com](mailto:Newhire+testpatient@mendfamily.com)

## 2. Request and join an On Demand appointment