GNOHIE Member Onboarding Checklist

**Step 1: Introductory Meeting & Readiness Assessment**

* Review GNOHIE background and services
* Review onboarding checklist
* Complete Readiness Assessment

**Step 2: Execute Contracts & Initial Onboarding Meeting**

* Review and sign Participation Agreement and Business Associate Agreement
* Review patient consent policy and sign attestation
* Discuss GNOHIE services of interest, define user preferences, and determine next steps needed from list below

**Step 3: Establish Secure Connection**

***For Direct Mail or SFTP:***

* Receive email from GNOHIE with Direct Mail or SFTP account information
* Login & create password
* Send test message or file

***For EHR interface:***

* Submit request to EHR vendor
* Convene conference call with EHR vendor
* Establish and test connection
* Send test messages

**Step 4: Implement Services**

* Go live with notification services based on design preferences
* Go live with reports based on design preferences

**Ongoing Engagement:**

* Ongoing guidance and support from a designated GNOHIE Account Manager
* Refresh trainings available upon request
* GNOHIE newsletters with updates, reminders, and user tips
* Customized reports & services may be available upon request