

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