

| Operational Tasks | Due Date | Lead |
|---|----------|------|
| <input type="checkbox"/> Sign required documents (e.g., contracts, non-disclosure agreements, and a BAA as a HIPAA covered entity) | | |
| <input type="checkbox"/> Host operations workflow meeting with key leadership (e.g., physician champion, VP of Case Management, Director of Operations) | | |
| <input type="checkbox"/> Identify costs (e.g., integration, licensing, etc.) to healthcare entity and understand financial considerations | | |
| <input type="checkbox"/> Complete Partner Registration Form and list all identified staff (users) who will need access to the platform (i.e., who will send referrals) | | |
| <input type="checkbox"/> Develop and distribute communication to staff about the initiative (i.e., high-level overview, how to prepare for training, etc.) | | |
| <input type="checkbox"/> Communicate next step of attending Unite Us training requirement to identified staff | | |
| <input type="checkbox"/> Schedule Unite Us training (virtual or in-person) for identified staff | | |
| Technical Tasks | | |
| <input type="checkbox"/> Complete Healthcare Entity IT Security Assessment of Unite Us (if required) | | |
| <input type="checkbox"/> Obtain Legal, Compliance, and IT Leadership Approval | | |
| <input type="checkbox"/> List the EHR systems and their respective versions | | |
| <input type="checkbox"/> Contact the EHR App Developer team (i.e., App Orchard for Epic, CODE for Cerner...) to start the process of adding Unite Us to the EHR | | |
| <input type="checkbox"/> Host implementation team meeting with EHR liaison, Healthcare Entity Project Manager, Unite Us EHR Product Manager, Community Engagement Manager, & Customer Success Manager | | |
| <input type="checkbox"/> Whitelist the following domains: uniteus.io and uniteustraining.com | | |
| <input type="checkbox"/> Decide from where in the EHR to launch Unite Us for the SMART on FHIR Standard and which Unite Us screen (e.g. Dashboard, Referral, Screening) should be launched from each integration point | | |
| <input type="checkbox"/> Provide Test and Production FHIR URLs to Unite Us | | |
| <input type="checkbox"/> Configure the FHIR URLs on the EHR side for both the Testing and Production environments | | |
| <input type="checkbox"/> Provide a list of all EHR users who are listed on the Partner Registration Form by first name, last name, email and EHR ID to Unite Us point of contact (Users must have a license in order to access Unite Us from EHR) | | |
| <input type="checkbox"/> Go live by releasing Unite Us access to all trained users | | |

If you have any questions about this process, feel free to reach out to your Account Manager