



Onboarding Process

INTRODUCTION TO CONNECT

This includes a presentation and demonstration of the system. CONNECT Coordinator will provide information regarding the system.

AGENCY CONFIRMATION

Agency needs to confirm they would like to continue with the onboarding process.

REFERRAL MAPPING

Referral mapping is completed to ensure agencies have referral partners. If agencies are identified that are not on the system, the CONNECT coordinator will pursue onboarding.

COMPLETE AGENCY ACCOUNT AND LIST OF USERS FORM

This will help categorize each agency in the system. Each person will need to have their own login.

AGENCY AND USER PROFILES ARE CREATED

The CONNECT Coordinator will use the account form as a guide and create profiles.

AGREEMENTS ARE SIGNED

Each agency designee must sign an agreement of use. Users will also have to sign an agreement at first login.

USER TRAINING IS PROVIDED

Each user should participate in user training. This can be provided in groups or on a 1:1.

GO-LIVE

Once agreements are signed, agencies can use the system.

CONTINUED AGENCY RESPONSIBILITIES

Any new or uses that need to be removed must be reported to CONNECT Coordinator

FOLLOW UP

The coordinator will conduct regular follow-ups. Technical assistance is provided as needed. Continues communication will include updates on new agencies, system enhancements, updated referral agencies, and newsletters