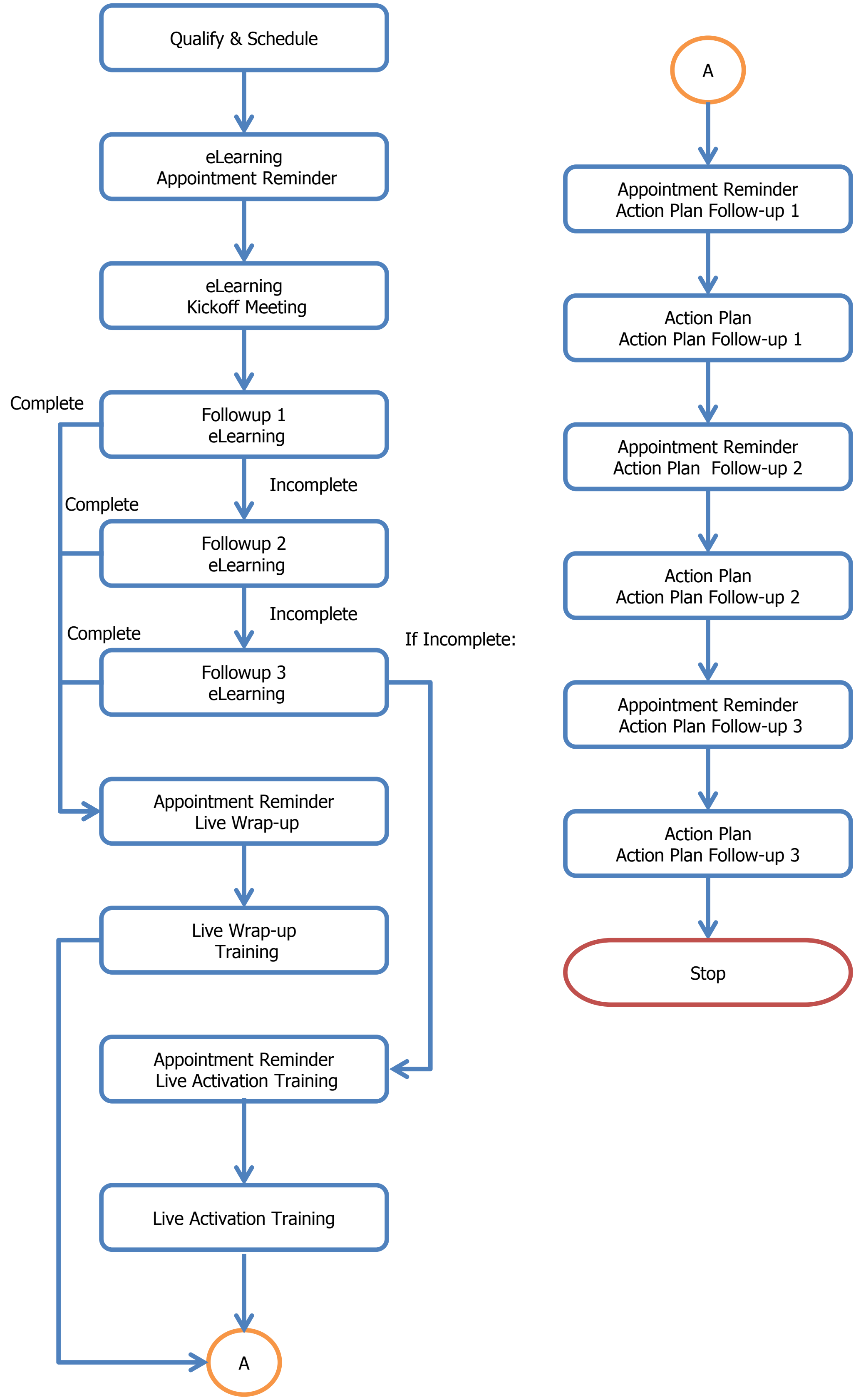
# Blended Process
## Draft 2



# eLearning Qualify and Schedule Call Guide Outline Draft 1.0

## When: Within 24 hours of approval
## Who: Newly approved offices

Objective: Schedule all Primary Learners (Learners who talk to the patients / clients regarding payment.

1. Qualify the provider office for eLearning (computer with internet connection and sound available for the eLearning).
    a. If office does not qualify, schedule a Live Training
2. Provide an overview of the Blended Activation Training Cycle
    a. Mention eLearning can take place anywhere that you can access a pc with an internet connection.
    b. Describe kickoff meeting
3. Record Primary Learner names, email addresses and cell phone numbers (notate if texting is OK)
4. Schedule in the date and time for
    a. eLearning Kickoff Meeting (via Webex)
        i. If any Primary Learners can't make the eLearning Kickoff Meeting, schedule more than one Kickoff Meeting.
        ii. Include link to CC Pro Video.
    b. Live Wrap–up Training
5. Explain Next Steps.

**Note: Full Call Guide is proprietary and confidential information.**

# eLearning  Appointment Reminder Call Guide Outline Draft 1.0

## When: 2 Days before eLearning kickoff meeting.

## Who: All eLearning qualified Primary Learners

1. Verify:
    a. Date time and phone number to call for all eLearning kickoff meetings scheduled
    b. Note Names of Learners attending
    c. Note Name of Primary Contact (person who administers provider portal access)
    d. Note Names and cell phone numbers of Primary Learners **not** attending
        i. Call Primary Learner non-attenders with a Qualify and Schedule Call
2. Provide an overview of the Blended Activation Training Cycle
3. Record Primary Learner names, email addresses and cell phone numbers (notate if texting is OK)
4. Schedule the date and time for
    a. eLearning Kickoff Meeting
    b. Face to Face Training
5. Explain Next Steps.
    a. At the end of the eLearning Kickoff meeting all eLearners will know how to access the eLearning and how to contact the CareCredit Training Coordinator if they have questions or problems.

**Note: Full Call Guide is proprietary and confidential information.**

# eLearning  Kickoff Meeting Guide Outline Draft 1.0

## When: On Scheduled Day (No more than 5 days after Provider Approval)

## Who: All eLearning qualified Primary Learners

1. Record in CRM:
    a. Names of Learners Present
    b. Names and cell phone numbers of Primary Learners **not** attending
2. If necessary, set up user ids and passwords for the learners.
3. Sign-on and Navigate to the “Basics” eLearning
    a. Show and explain how to sign on navigate to and launch the Basics eLEarning
    b. Have each learner practice
4. Get commitment to finish the 7 module eLearning (five 20 minute sessions)
    a. eLearning Kickoff Meeting
    b. Face to Face Training
5. Explain Next Steps.
    a. Contact the Training Coordinator if they have questions or problems.
        i. Email contact info
    b. Training Coordinator will call in 2 days to check progress.
        i. All leaners should have approximately 50% complete.
    c. Schedule an additional Kickoff for Primary Learners not present.

**Note: Full Call Guide is proprietary and confidential information.**

# eLearning Followup1 Guide Outline Draft 1.0

## When: 2 days after Kickoff

## Who: All eLearning qualified Primary Learners

1. Identify yourself
2. Answer or resolve any questions or issues
3. Record in CRM:
    a. FLUP1 and name of Primary eLearner
    b. # modules completed
    c. Estimated completion date
4. Explain Next Steps.
    a. Contact the Training Coordinator if they have questions or problems.
        i. Email contact info
    b. Training Coordinator will call in 2 days to check progress.

**Note: Full Call Guide is proprietary and confidential information.**

# eLearning  Followup2 Guide Outline Draft 1.0

## When: 2 days after Followup1

## Who: All eLearning qualified Primary Learners

1. Identify yourself
2. Answer or resolve any questions or issues
3. Record in CRM:
    a. FLUP2 and name of Primary eLearner
    b. # modules completed
    c. Estimated completion date
4. Explain Next Steps.
    a. Contact the Training Coordinator if they have questions or problems.
        i. Email contact info
    b. Training Coordinator will call in 2 days to check progress.

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# eLearning Followup 3 Guide Outline Draft 1.0

## When: 2 days after Followup 2

## Who: All eLearning qualified Primary Learners

1. Identify yourself
2. Answer or resolve any questions or issues
3. Record in CRM:
    a. FLUP3 and name of Primary eLearner
    b. modules completed
4. Schedule Live Wrap Up (preferably within 2 days) if all Modules are complete (email the schedule)
5. Schedule a Live Training (preferably within 2 days) if all modules are not complete
6. Explain Next Steps
    a. Contact the Training Coordinator if they have questions or problems.
        i. Email contact info
    b. Repeat date, time and phone number for the Live Training or Live Wrap Up

**Note: Full Call Guide is proprietary and confidential information.**