

Provider Onboarding Guide

Day-by-day plan for onboarding a new prescribing provider onto the CloudHealth platform.

Day 1 — Credentialing Verification

ITEM	OWNER
State medical license(s) — primary verification source check	CloudHealth Clinical Ops
DEA registration verified against active CSOS roster	CloudHealth Clinical Ops
NPI confirmed against NPPES registry	CloudHealth Clinical Ops
Malpractice insurance certificate on file (≥ \$1M/\$3M)	Provider
Background check & OIG/SAM exclusion screening complete	CloudHealth Clinical Ops

Day 2 — Platform Access

1. Provider account created with role **PRESCRIBER**.
2. MFA enrolled (TOTP authenticator).
3. Provider added to client's review queue routing rules.
4. EHR sandbox access granted; test patient created.

Day 3 — Clinical Workflow Training

- Review queue triage: how to read intake, flag for more info, approve, or decline.
- Prescribing workflow: drug selection, dose, refills, pharmacy routing.
- Patient messaging: HIPAA-safe templates, response SLA (24 hrs).
- Adverse event & safety reporting protocol.

- Documentation standards: every encounter requires SOAP-style note.

Day 4 — Shadow Reviews

Provider completes 5 shadow reviews alongside Clinical Ops Coordinator. No live prescriptions issued. Outcomes are compared against the lead reviewer's decision.

Day 5 — Supervised Go-Live

Provider reviews live patient intakes with Clinical Ops monitoring all decisions in real time. Provider may issue prescriptions. Decisions are audited end-of-day for the first 5 business days.

Day 10 — Independent Practice

Provider transitions to unsupervised practice. Random 10% audit continues for 30 days.

Ongoing — Quality & Compliance

CADENCE	ACTIVITY
Weekly	Review queue volume and SLA report
Monthly	Random chart audit (5%)
Quarterly	Clinical quality review with Medical Director
Annually	HIPAA training, license re-verification, malpractice renewal