

Step by Step Enrollment Process

1. How to be prepare for the Enrollment Day

- Please ensure that your clients have a list of their current medications, viral load, and CD4. This information will be added to Clinikly.ai after you have completed the download process.

2. Initial Meet and Greet

- Conduct a friendly introduction in either a group or individual setting.

3. Introduction to Clinikly.ai

- The Engagement Specialist / Case Manager explains the benefits of using Clinikly.ai, highlighting its features and how it can assist clients in managing their health.

4. Assess Device Eligibility

- **Pre-screening:** The Case Manager checks if the client qualifies for a free 5G smart device based on income or participation in government assistance programs (e.g., SNAP, Medicaid).
- **Qualification Criteria:**
 - Income below 138% of FPL
 - Participation in government assistance programs such as:
 - Supplemental Nutrition Assistance Program (SNAP)
 - Medicaid
 - Supplemental Security Income (SSI)
 - Federal Public Housing Assistance (FPHA)
 - Veterans Pension or Survivors Benefit Program
 - Tribal Specific Programs
- If the client doesn't qualify, assist the client with completing an online application with:
 - [Lifewireless](#)
 - [Safelink Wireless](#)
 - [Assurance](#)

5. Loaner Phone Agreement

- If the client does not have a device, The client will have access to receive a loaner phone from Clinikly.ai.
- Review the terms and agreement for the loaner phone with the client.
- The client signs and dates the agreement after acknowledging the terms.

6. Complete the Profile Form

- The Case Manager fills out the Profile Form with the following details:
 - Client's Name
 - Clinikly.ai ID number
 - Client's New/Existing Telephone Number
 - Agency
 - Case Manager
 - Date
 - Is this a Replacement Telephone? (Yes/No)
 - What number of Replacement phone will this be?

7. Client Evaluation Forms

- The client completes the Evaluation Forms, which should take about 15-20 minutes based on their individual needs.

8. Review User Consent and HIPAA Responsibilities

- The client reviews the Clinikly.ai User Consent Form and HIPAA User Responsibilities Form.
- After review, the client signs and dates the forms to acknowledge their agreement.

9. Enrollment Completion

- Once the client has completed all enrollment paperwork and downloaded the Clinikly.ai app, the Engagement Specialist assists the Case Manager in obtaining access to Clinikly.ai Pro.
- The Case Manager receives the website address, username, and a temporary password via email.

10. Provide Technical Support Information

- Share contact information with the Case Manager and clients for any technical problems or suggestions they may encounter.

This structured approach should help facilitate a smooth and organized Day 1 for client enrollment and orientation.

- The client will complete the Evaluation forms which should take about 15 to 20 depending on the client's needs.