

Multi-Party Client Onboarding

Mapped the parties in a multi-stakeholder onboarding process and defined who is responsible, accountable, consulted, and informed at each step.

Role: Patient Care Coordinator (most recent role)

Process: Onboarding a new case from intake to active service across five external partners

Stakeholder Map

- **Care Coordinator (you):** owns coordination across every party and drives each case from intake to active service.
- **Referring Provider:** approval authority for authorizations and program certifications; engage with concise, complete requests to avoid back-and-forth.
- **Payer / Insurance:** controls coverage decisions; engage with accurate documentation and disciplined follow-up.
- **Partner Assistance Programs:** provide financial assistance and access support; engage per each program's rules and timelines.
- **Clinical Reviewer (Pharmacist):** verification and final-release accountability; consulted and informed on clinical steps.
- **Client (Patient):** the reason for the work; needs clear communication and the lightest possible burden.

RACI Matrix

R = Responsible (does the work) A = Accountable (owns the outcome) C = Consulted I = Informed - = not involved

Activity	Care Coordinator	Provider	Payer	Partner Programs	Clinical Reviewer	Client
Referral intake and verification	A/R	C	-	-	I	I
Benefits and coverage investigation	A/R	I	C	-	I	I
Coverage approval submission and follow-up	R	A	C	-	I	I
Assistance program enrollment	R	C	-	A	I	C
Required regulatory program enrollment	R	C	-	-	A	C
Client onboarding, education, and consent	A/R	I	-	-	C	C
Service initiation and first delivery	R	I	-	-	A	C
Ongoing monitoring and renewal coordination	A/R	I	-	-	C	C
Documentation and audit support	A/R	I	I	I	C	-

Project Management Competencies Demonstrated

- Stakeholder identification and analysis
- Role clarity through RACI assignment
- Process mapping across a multi-party workflow
- Cross-functional coordination and communication planning