Stage 2: Provider Partner Onboarding Setting-up the Referral Partner Purchase Apply Tag Task completed Plan 1 Yearly - Active Provider Portal Plan 1 Yearly SKU Remove Tag Referral Partner Setup Pending Email Link clicked Referral Partner Send Email with Send Email for Apply Tag Send Email to Choose Payment Plan Referral Partner Plan 1 Web form Account Info & Agreements Setup Commission Plan 1 Setup Pending submitted Access Links to: Referral Partner Center Provider Partner Portal Purchase Apply Tag Task completed Welcome Kit Plan 1 Monthly - Active Provider Portal Plan 1 Monthly SKU Remove Tag Referral Partner Setup Pending Send Email for Email Link clicked Apply Tag Referral Partner Apply Tag Task completed Send Email with Referral Partner Plan 2 Web form Plan 2 Free - Active Agreements Account Info & Setup Commission Plan 2 Setup Pending submitted Remove Tag Access Links to: Referral Partner Setup Pending Referral Partner Center Provider Partner Portal Welcome Kit Agreements Web Form Submitted Send Email for Email Link clicked Apply Tag Referral Partner Send Email to Product purchased Task completed Send Email with Apply Tag Agreements Referral Partner Plan 3 Web form Choose Payment Plan Plan 2 Free - Active Account Info & Setup Commission Plan 3 Setup Pending Remove Tag Access Links to: submitted Referral Partner Setup Pending Referral Partner Center Provider Partner Portal Welcome Kit Email Link clicked Send Email for Apply Tag Referral Partner Task completed Send Email with Apply Tag Referral Partner Plan 3 Web form Plan 2 Free - Active Account Info & Agreements Setup Commission Plan 2 Remove Tag Setup Pending submitted Access Links to: Referral Partner Setup Pending Referral Partner Center Provider Partner Portal

Welcome Kit