



Onboarding Checklist for ProHEALTH NY Physicians, APCs and Licensed Clinical Professionals

Refer to this checklist daily. Complete all activities, ideally in the order listed, by following the instructions in the right column.

For anyone scheduled to be out of the office during the dates listed below (i.e., PTO or a leave of absence), contact Meaghan Slater at [mslater@caremount.com](mailto:m Slater@caremount.com) immediately.

Date(s)	Action	Instructions
July 9-11	The welcome email will be sent to your current business email and will include information on: <ul style="list-style-type: none">• UKG Pro Onboarding• Screening requirements• Form I-9 requirements The welcome email: <ul style="list-style-type: none">• Sender: <i>CareMount Medical, P.C./CareMount Health Solutions, LLC</i> <onboarding@cmmedical.com>• Subject line: <i>(Name of Employee), Welcome to CareMount!</i>	Click on the link in the email to navigate to UKG Pro Onboarding. Questions can be directed at: Tiffany Ward tifward@caremount.com 914-302-8431 Cyndi Palmer cpalmer@caremount.com 914-242-1302

Date(s)	Action	Instructions
July 9-15	<p>Use your UKG Pro credentials to complete your onboarding information:</p> <ul style="list-style-type: none"> • Screening requirements • Personal information • Employment eligibility forms • Pay, taxes & direct deposit forms • Policy & documents forms <p>There is no pre-validation for direct deposit, therefore please make sure your information is accurate since it will be used for your first paycheck.</p>	<p>Create your UKG Pro user name and password as outlined in your welcome email:</p> <ol style="list-style-type: none"> 1. Click the link which will direct you to the UKG Pro webpage 2. Click create/reset password 3. Enter your current business email 4. Go to email provided by UKG Pro and select <i>Click here to create your new password</i> 5. Insert password information and click <i>Reset Password</i> <p>(revised 7/12) There is a known issue that some team members are not receiving the email identified in step 4. If you think you may be impacted by this issue, please check your trash, spam, or non-focused folders first. If you cannot locate the email, contact Cyndi Palmer at cpalmer@caremount.com, or 914-242-1302.</p> <p>Must be completed by July 15.</p>
July 9-13	<p>Complete your screening requirements (i.e., background check) via CareMount's third-party vendor, Asurint. This takes less than 5 minutes and is required to remain eligible for transition and continued employment.</p> <p>Background check includes:</p> <ul style="list-style-type: none"> • Criminal searches • Verification of your social security number • Licensure check if you're in a professional role that requires a license 	<p>The link will be included in the welcome email: http://caremounthealthsolutions.asurint.com/ (portal code: StandardCMPC)</p> <p>Questions can be directed at: Asurint support@asurint.com 800-906-1674</p> <p>Sam Tartaglia startagl@caremount.com 914-302-8513</p> <p>Must be completed by July 13.</p>

Date(s)	Action	Instructions
July 13 <i>(revised 7/12)</i>	Licensed clinical professionals will receive an employment transition letter via DocuSign. The letter will include your compensation information and your new CareMount system title.	Email will be sent from DocuSign.com and require an electronic signature. Please be sure to check your spam or trash in the event your DocuSign is not in your current business email. Please review the letter and sign it no later than July 15.
Beginning July 11	Complete your Form I-9 electronically in UKG Pro Onboarding. After you submit Section 1 of the Form I-9, please meet with your manager so they can physically review your employment eligibility document(s) to satisfy Section 2 of your Form I-9 by July 31. Your manager will be required to scan or copy your document(s) and securely email them to CMM-BenefitSupport@caremount.com . If you present a List A document, copies of the front and back must be securely emailed to CareMount.	To access the electronic Form I-9, log in to UKG Pro using the link provided in your welcome email and follow the steps. You must have original and unexpired employment eligibility documentation as of Sept. 1 as described in the Form I-9 Lists of Acceptable Documents located on the transition website (enter CareMount2022 as the case-sensitive password). By law, both sections of your Form I-9 must be successfully submitted by 4 p.m. ET on Sept. 6 otherwise, you will not be able to continue employment with CareMount.
July 18-22	Join a CareMount benefit education session held virtually to help prepare for the enrollment.	All one-hour sessions will cover the same information. A recording will be posted to the transition website (enter CareMount2022 as the case-sensitive password).

Date(s)	Action	Instructions
July 27- Aug. 3	<p>Enroll in or opt out of CareMount elected health and wellness benefits including medical, dental and vision.</p> <p>As long as you submit your elections during this initial enrollment period (July 27 – Aug. 3), your elected benefits are effective Sept. 1.</p> <p>This is your only opportunity to enroll in most elected benefits — including medical, dental or vision — until the next Open Enrollment period, unless you have a qualified life event, such as marriage, divorce, or birth/adoption of a child during the plan year</p>	<p>Enroll in benefits on the online enrollment portal: https://enroll.benefitsconnect.net/caremount</p> <ol style="list-style-type: none"> Your Username is <ul style="list-style-type: none"> The first 6 letters of your Last Name First letter of your First Name Last 4 digits of your Social Security Number <p><i>*If your Last Name is less than 6 letters, you would just utilize your full last name i.e., James Bond would be – BondJ0007</i></p> Your Password has been defaulted to your entire Social Security Number without the dashes. <p>Questions can be directed at: CMM-BenefitSupport@caremount.com</p> <p>Must be completed by Aug. 3.</p>
Beginning Aug. 29 <i>(revised 8/23)</i>	<p>You will need to set up your UKG credentials to use every time you login to UKG Pro.</p>	<ol style="list-style-type: none"> From your intranet site navigate to the “Administrative” menu and select “UKG Job Aid” You may also open Chrome and enter the following URL: https://e41.ultipro.com/login.aspx Enter your User ID which will be your first initial and full last name including any spaces or hyphens (e.g. JDoe@CMPC) Enter your temporary password which is your date of birth (DOB) in a mmddyyyy format and select “Sign in” When prompted, enter temporary password in step #3 to create your new password following the required minimum requirements. Once all three boxes have been completed and all requirements

		<p>met, the “OK” button will illuminate for you to click.</p> <p>6. You will be directed to a new page to select and answer three challenge questions which are case sensitive</p>
Sept. 1	<p>Review your Personal Information in UKG Pro and update, if necessary.</p> <p>You can make changes at any time.</p>	<p>Check your home and mailing addresses, phone numbers, email addresses and emergency contacts.</p>
Sept. 6 at 10 a.m. ET	<p>Deadline for managers to review and approve employee time for the Sept. 9 paycheck.</p>	<p>A job aid will be posted on the transition website prior to Sept. 1. In addition, you will be invited to attend UKG training.</p>
Sept. 9	<p>Receive your first CareMount-administered paycheck.</p>	<p>This check contains pay for Sept. 1 – 4.</p> <p>If you did not complete your direct deposit information as part of the onboarding process, you’ll receive a paper check in the mail at your address on record within UKG.</p>
Date(s)	Action	Instructions
Sept. 15 at 4:00 p.m. ET	<p>Deadline for eligible employees to enroll or change your contribution amount for the CareMount 401(k) plan in time for your paycheck on Sept. 23. You can make changes at any time.</p>	<p>Log in to Fidelity NetBenefits® to access and view both your prior ProHEALTH 401k as well as your CareMount 401k.</p> <p>Your ProHEALTH Fidelity user name and password will remain the same. If your login information is not available, please click the Register as a new user or Forgot login? link on Fidelity NetBenefits®</p> <p>As of Sept. 1, you’ll be able to navigate to your new 401k account with CareMount to update your contributions. If you do not take action, you’ll be automatically</p>

enrolled at a 3% pretax contribution rate on your Oct. 21 paycheck.

Sept. 23

Check the balance in your CareMount PTO bank if you were expecting ProHEALTH hours to transfer to ensure everything looks correct.

PTO and sick balances will be available by your second paycheck, Sept. 23, and visible in the UKG Pro Time and Attendance platform.

Questions can be directed at:
Matt Robinson at
marobins@caremount.com

Varies

Complete CareMount required training.

Log in to UKG Pro to access CareMount University to take annual mandatory training.

CareMount Learning Services will send a communication with instructions to complete training in Sept.
