

## REFERRAL PROGRAM POLICY

Health Informatics Consulting, LLC (HIC) depends on referrals from employees, contractors, affiliates, clients, business associates, and friends to generate leads for new business opportunities. The purpose of this policy is to outline the scope, rules of engagement, compensation, and exceptions.

### **Program Scope:**

At HIC, we value our clients. Good customer service is our primary concern. We believe that if you are satisfied with the services we provide, you will actively share your experience with your colleagues and friends. There is no better reference for us than a recommendation from a satisfied customer. We are happy to compensate you for your interest in promoting our business by providing a referral fee for new contracted business that you bring to HIC.

All referrals are welcome, and we will follow up on each one on a timely basis to ensure we close your referral as soon as possible. Don't overlook the smallest opportunity or assume that one will not pan out or be lucrative. You would be surprised how many fruitful opportunities are won when least expected.

## Definitions:

- New Client Referral: A new client is one who has not had prior contact with HIC. Clients with previously contracted work, non-contracted work, grant training, pro-bono work, or have a pre-existing working relationship with an HIC team member are not considered to be new clients.
- New Service Referral: A client purchasing a new service from HIC is considered a new service referral. Clients who extend or expand existing services that are or have been contracted previously or an active or previous grant recipient, do not qualify. For example, a current client has contracted with HIC to do EHR implementation, and chooses to also contract with HIC for HIPAA and OSHA training. This would be considered a new service referral.
- New Service Referral Exceptions: Grant clients that have exhausted their training hours and request a contract for services that are a direct extension of approved training courses under their grant application do not qualify. New services will qualify as a New Client or New Service Referral.
- New Enterprise Referral: An enterprise is a hospital, large multi-practice organization, IPO, IPA, HIE or other large health care organization that contracts with HIC for new services.

## Rules:

1. All referrals are required to be submitted on an HIC Referral Lead Form with accurate and complete information and signed by the person making the referral. It can be faxed or emailed to Stevie Davidson **and** Amanda DeNapoli. If the Referral Lead Form does not have accurate or has incomplete information, it will be your responsibility to complete and resubmit in order for HIC to follow-up on your referral lead.
2. Before you engage a New Client Referral, you should inquire if they have had prior interaction or a current working relationship with Stevie Davidson or any other member of the HIC team. It is mandatory that you submit a Referral Lead Form via fax or email to Stevie Davidson and Amanda DeNapoli. You will receive a confirmation of receipt, and due-dilligence of the referral will be performed on a timely basis.
3. PLEASE DO NOT DISCLOSE RATES or TERMS OF OUR CONTRACT AT ANY TIME. Your practice may have received favorable rates due to a program or special offer. These rates may not always be available to new clients. It is okay to say that the HIC rates are reasonable and affordable and a good value for your investment.

4. Referrals where contact has already been established by a representative of HIC or another referral source do not qualify and referral fees will not be paid unless there are extenuating circumstances where payment is appropriate. Exceptions will be made solely at the discretion of HIC management and not unreasonably withheld.
5. If a contract is closed based on your approved referral submission, a letter will be provided to you within five (5) business days. Referral fees are only paid on services sold in the initial contract. Services outside the scope of the initial contract do not qualify unless a referral form is submitted by you for a New Service Referral.
6. Referral fees are based solely on consulting services. Taxes, travel and other expenses are not included when calculating referral fees.
7. All proposals and contracts will be developed, delivered and negotiated by HIC management.
8. HIC provides marketing materials to help you pursue additional opportunities. If you need materials or have suggestions for modifying or adding new tools and materials, please send your request to our Office Administrator, Amanda DeNapoli.

### **Compensation:**

HIC appreciates the efforts of its clients, partners, and friends, and will provide compensation for your extra effort. This program is intended to compensate individuals who assist us in finding business. Payments are made to the referring individual, not to the practice or office, unless specifically requested. All compensation is subject to current tax laws and other regulations. Judgments as to the applicability of referral compensation and exceptions to the policy are at the sole discretion of HIC management.

Payment will be made at the end of each month in which payment is received from the client. At the time of payment, you will receive a letter stating the basis for the referral fee. Referrals will be compensated according to the following table. Any questions regarding the appropriateness or applicability of this information should be addressed prior to any contact or discussions with a referral candidate.

**Referral Fee Compensation Table:**

<b>Referral Type</b>	<b>Contract Requirement</b>	<b>Compensation*</b>
New Client Referral	Minimum 8 hours	5% of each invoice
New Service Referral	Minimum 8 hours	5% of each invoice
New Enterprise Referral	Minimum 40 hours	5% of each invoice

\* Compensation over \$500.00 in a calendar year will be subject to 1099 reporting based on applicable laws. Payment will not be made unless a completed W-9 form has been provided to HIC.

On behalf of the HIC team, we thank you in advance for your extra efforts in identifying additional business opportunities.

Contact Information:

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