DENTALXPAND LEARNING CENTER / PROVIDER AND DSO

Create Client BAA and Service Agreements

A repository-grounded operator guide to counsel-approved templates, verified legal parties, BAA variables, commercial terms, live preview, canvas signatures, PDF generation, Gmail delivery, protected records, retention, exact permissions, and default-practice ownership.

VERSION	1.0	AUDIENCE	Administrators and authorized agreement managers
FORMAT	Website + PDF	SCOPE	DentalXpand BAA and B2B Service Agreement workflow

Operational training, not legal advice
All examples are fictional. Use only counsel-approved, party-specific templates and terms. Never place patient PHI, credentials, banking data, another tenant, another Xpand product, or Guardian Connect data in agreement fields, screenshots, PDFs, email, support messages, or AI prompts.

Contents

Select a section in supported PDF viewers. Use the Contents link in the upper-right corner of each content page to return here.

Current release limitations
Client Agreements has no client-portal e-sign request, authenticated signing certificate, returned-document upload, mark-signed control, archive, restore, or practice selector. Selecting a provider fills party data but does not switch the record's practice owner.

01 / OPERATING MODEL

Separate drafting, approval, delivery, acceptance, and retention

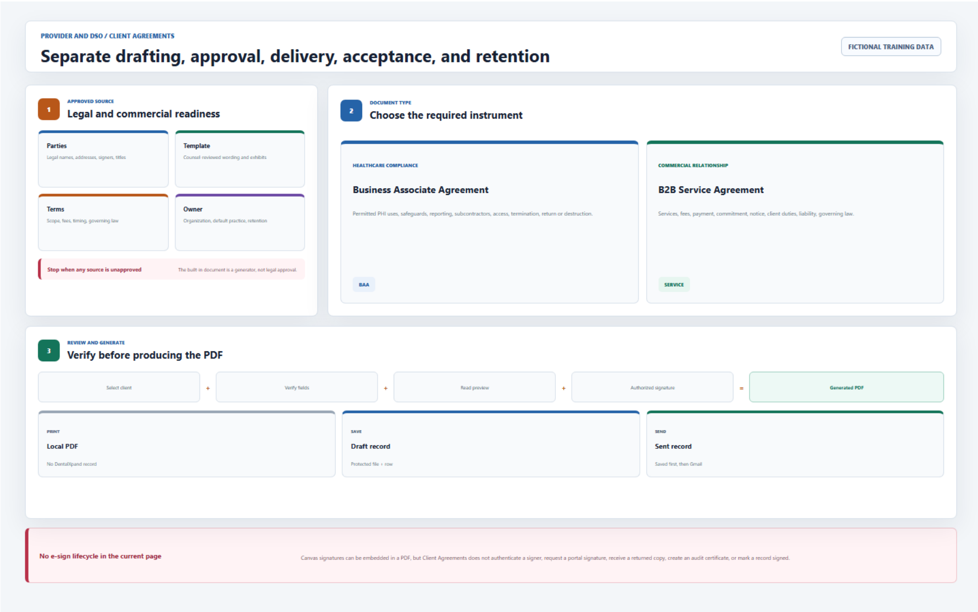

Figure 1. Fictional agreement operating flow separating approved sources, document type, preview, signature capture, PDF generation, protected records, delivery, acceptance, and retention.

Stage	DentalXpand behavior	Required external control
Source	Maintained BAA and Service Agreement templates plus entered values.	Counsel-approved wording, parties, exhibits, and commercial offer.
Draft	Live preview updates immediately from the selected type and form.	Full comparison against approved source after every correction.
Signature	Client and optional DentalXpand canvas marks embed as PNG in PDF.	Signer authority, consent, identity, and approved signing method.
Generate	Print creates local PDF; Save and Send upload protected PDF and row.	Controlled document owner and version or supersession procedure.
Deliver	Send persists status sent, then calls connected Gmail with attachment and link.	Explicit send evidence, acceptance workflow, and executed-copy custody.
Retain	Saved card can open or irreversibly delete a protected record.	Retention schedule, legal hold, deletion authority, and final reconciliation.

02 / LEGAL AND OPERATIONAL READINESS

Approve the instrument, parties, terms, owner, and retention rule

Confirm	Approved evidence	Stop when
Agreement need	Authorized onboarding, renewal, amendment, compliance, or service request.	BAA, service agreement, both, or another instrument is unclear.
Legal parties	Exact legal names, entity types, full addresses, signers, and titles.	Nickname, outdated address, or assumed signer appears.
Template	Current counsel-reviewed version with required exhibits and amendments.	Built-in wording is not approved for this party and jurisdiction.
BAA variables	Permitted uses, reporting, cure, termination, return or destruction, governing law.	A variable, unit, or required provision is uncertain.
Commercial terms	Approved scope, fee basis and value, billing, payment, term, notice, and start date.	Fee is blank, unitless, or conflicts with authorized offer.
Owner and retention	Organization, default practice, recipient, execution owner, schedule, and legal hold.	Practice owner or executed-copy process is unknown.

Official HHS BAA reference
HHS explains required BAA topics and warns that sample provisions may not be sufficient for a binding state-law contract. Review the official HHS sample BAA provisions with qualified counsel; do not treat the sample or DentalXpand template as automatic legal sufficiency.

HHS sample BAA provisions	Client Agreements
HHS sample BAA provisions	**Client Agreements**

03 / ACCESS AND PREFLIGHT

Verify page, action, file, tenant, practice, and Gmail controls

Control	Current behavior	Required verification
Page	Admin route allows admins; custom users need pages:client_agreements.	Named account and minimum approved page access.
Agreement action	Table writes map to agreements create, update, or delete.	Exact action matches Save, Send, or Delete need.
File action	Save and Send upload generated PDF to protected files storage.	File upload or create authority is present.
Organization	Row receives current organization and tenant-aware RLS applies.	Expected DentalXpand tenant, never another client or product.
Practice	No selector; row and path use current default practice.	Intended owner is the active default before Save or Send.
Gmail	Send uses the connected Email Outreach Gmail account.	Authorized sending account and recipient are confirmed.
Training data	Form can render and generate supplied legal metadata.	Use fictional data; never test with PHI or credentials.

Page access is not write authority
Do not promote a user to Admin as a workaround. Review exact role, agreement action, file action, tenant membership, and default-practice context.

User Management	Roles	Email Outreach
User Management	**Roles**	**Email Outreach**

04 / CLIENT IDENTITY

Select a directory record, then verify every legal field

Step	Current behavior	Operator rule
Select type	BAA or B2B Service Agreement activates its maintained template.	Confirm authorized instrument before entering terms.
Search	Merged active dedicated providers and legacy provider employees; up to eight results.	Use the intended canonical client, not a similar display name.
Auto-fill	Name, phone, and city/state/ZIP locality fill both types; service also fills email.	Treat convenience data as unverified until matched to approved source.
Address	Street address is not populated by selection.	Enter full legal street, city, state, ZIP, and jurisdiction.
Signer	Signer name and title remain operator-entered.	Confirm current authority for this exact entity and instrument.
Provider link	Dedicated result can set provider_id; legacy result can leave it null.	Do not mistake a display match for a canonical relationship.
Practice	Selecting provider does not change default-practice ownership.	Verify intended default practice separately before persistence.
DentalXpand identity	Maintained template contains service-provider name, contact, website, and signer values.	Authorized owner must confirm every contracting-party field.

Canonical identity first
Correct approved directory data through Providers / Clients. Do not create a one-off legal identity inside the agreement when the source record is wrong.

Providers / Clients	Client Agreements
Providers / Clients	**Client Agreements**

05 / BUSINESS ASSOCIATE AGREEMENT

Verify party identity, timing fields, obligations, and governing law

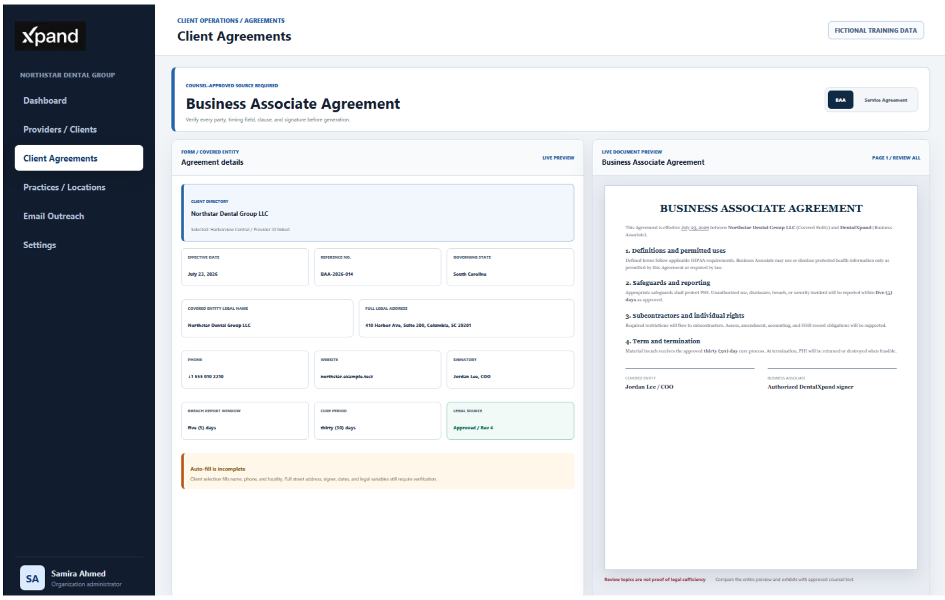

Figure 2. Fictional BAA form and live preview with covered entity, effective date, reference, reporting window, cure period, governing state, and full-clause review controls.

BAA control	Current default or content	Required review
Effective date / reference	Date starts as today; reference is optional.	Approved date, trigger, and controlled reference convention.
Covered Entity	Name, address, phone, website, signatory, and title.	Exact entity, complete address, authorized signer, and title.
Report window	Defaults to five (5).	Unit, trigger, method, and counsel-approved obligation.
Cure period	Defaults to thirty (30).	Material-breach process, timing, and termination rights.
Governing state	Defaults to South Carolina.	Approved jurisdiction for actual contracting parties.
Maintained clauses	Safeguards, incidents, subcontractors, rights support, HHS records, permitted uses, term, termination, return or destruction.	Full wording, definitions, exhibits, and party-specific requirements.

No patient PHI in the form
Use legal-party and contract metadata only. Patient names, dates of birth, insurance IDs, clinical records, credentials, and payer portal details do not belong in this workflow.

06 / B2B SERVICE AGREEMENT

Translate the approved offer into complete commercial terms

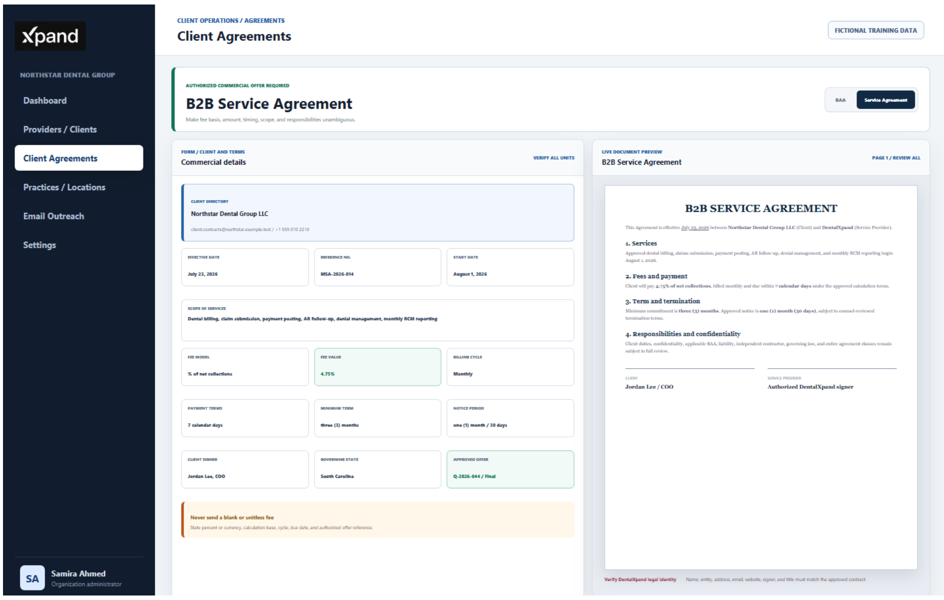

Figure 3. Fictional Service Agreement form and preview with verified client identity, scope, fee basis and value, cycle, payment terms, start date, commitment, notice, and governing law.

Commercial control	Current default	Required review
Scope	Dental billing, claims, posting, AR follow-up, denials, and RCM.	Only contracted services, exclusions, dependencies, and exhibits.
Fee	Percentage of net collections; value starts blank.	Exact percent or currency, calculation base, and authorized offer.
Billing / payment	Monthly billing; payment due in 7 days.	Cycle, trigger, due date, taxes, dispute, late, and remittance rules.
Commitment	Three (3) minimum term.	Time unit, renewal, early termination, and liability terms.
Notice	One (1) month (30 days).	Notice method, timing, recipient, and effective termination date.
Start / jurisdiction	Start blank; governing state South Carolina.	Execution, effective, onboarding, service start, governing law, and venue.
Maintained clauses	Services, payment, term, client duties, confidentiality/BAA, liability, contractor, law, entire agreement.	Full counsel-approved wording and interaction with BAA.

Never send a blank or unitless fee
A bare number is ambiguous. State the fee value, percent or currency, calculation base, billing cycle, due date, and approved source reference.

07 / PREVIEW AND SIGNATURES

Read the complete rendered document before applying a mark

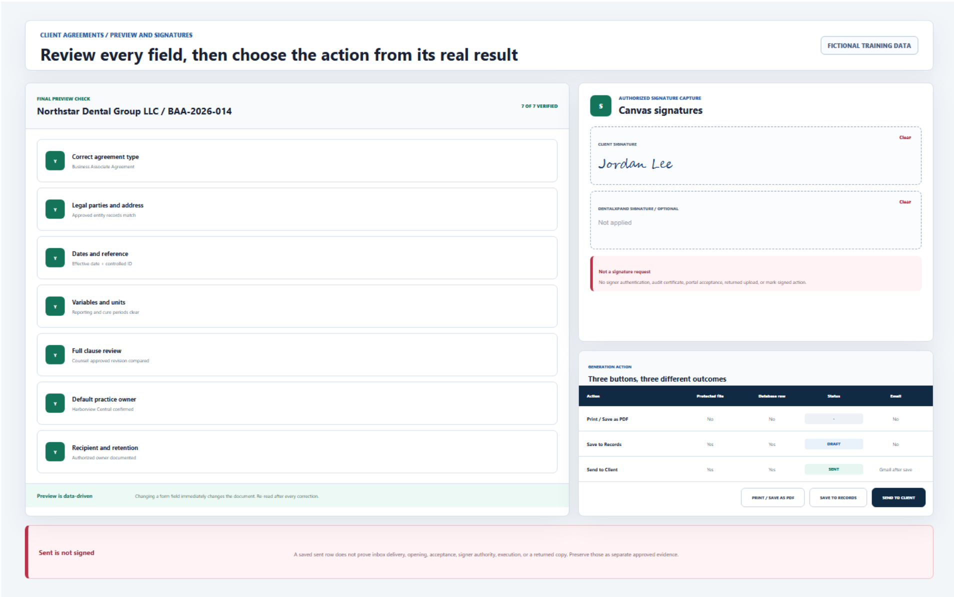

Figure 4. Fictional final-preview checklist, client and optional DentalXpand signature pads, and action matrix for Print, Save, and Send.

Review step	Required action	Do not assume
Read all text	Check title, parties, addresses, dates, references, defined terms, variables, units, clauses, and signature blocks.	A complete-looking preview is current or approved.
Compare source	Review every maintained clause and exhibit against approved revision.	Visible variable fields are the only legal changes.
Verify provider identity	Confirm DentalXpand entity, address, contact, website, signer, and title.	Brand name equals contracting entity.
Capture client mark	Only with authorized signer present and approved canvas process.	Drawing authenticates identity or consent.
Capture provider mark	Optional and only by authorized DentalXpand signer.	A saved image can be reused by staff.
Clear errors	Clear and redraw before generation; re-read after any field correction.	Generated PDF can be edited in the current page later.
Execution	Govern acceptance, counter-signature, effective conditions, and final copy separately.	Canvas signatures create an e-sign certificate or signed status.

08 / PRINT, SAVE, OR SEND

Choose the button from its actual persistence and delivery result

Action	Actual result	Does not do
Print / Save as PDF	Requires name, opens browser print dialog through hidden frame, and can create a local PDF.	No upload, database row, status, or email.
Save to Records	Requires name, creates A4 PDF, uploads protected file, inserts status draft row.	No email, signature request, acceptance, or signed status.
Send to Client	Requires name and valid email; creates one PDF, saves status sent row, then sends Gmail attachment and link.	No guarantee of Gmail delivery, opening, acceptance, signature, or execution.

Controlled action sequence

1. Print only for an approved local handoff; store the local PDF in the authorized repository and remember it will not appear in Records.
2. For Save, wait for success, refresh the list, open the PDF, and verify client, type, content, organization, and default-practice ownership.
3. For Send, confirm connected Gmail, recipient, legal approval, and minimum necessary content before clicking.
4. Do not click repeatedly while generation or delivery is running; wait for completion or a clear error.
5. Never treat a draft or sent row as a signed, accepted, or executed agreement.

Client Agreements	Email Outreach
Client Agreements	Email Outreach

09 / DELIVERY EVIDENCE

Separate persistence success from Gmail success

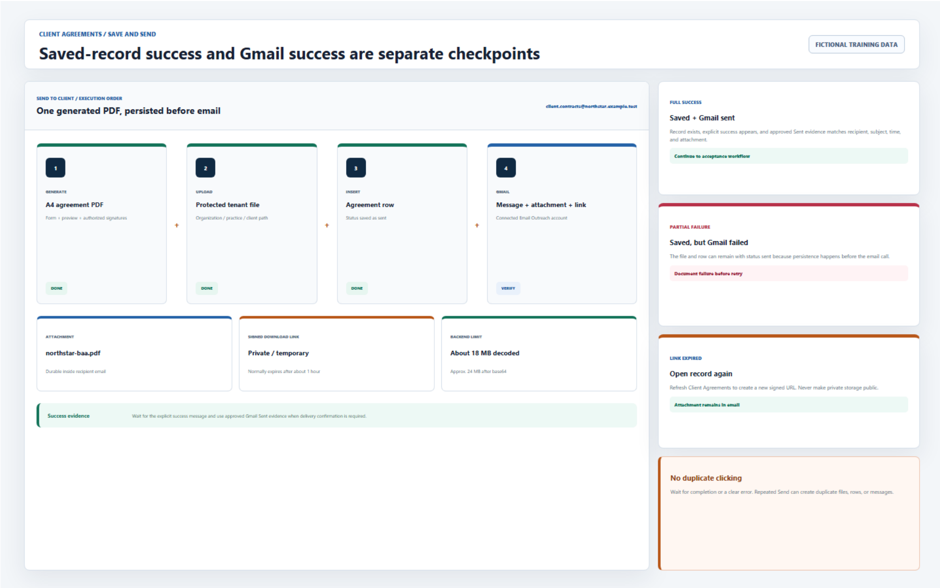

Figure 5. Fictional Send flow: generate PDF, upload private file, insert sent row, call Gmail, attach PDF, include temporary link, then verify success or partial failure.

Checkpoint	Current behavior	Required evidence
Persistence	File and sent row are created before Gmail call.	Saved record is correct, but is not proof of delivery.
Email success	Connected Gmail sends attachment and signed URL after save.	Explicit success plus approved Sent-folder evidence when required.
Partial failure	Row and file can remain with sent status if Gmail fails.	Document failure and use approved retry or alternate delivery.
Attachment	PDF remains with recipient email.	Recipient, subject, time, attachment name, and authorization match.
Signed link	Protected URL normally expires after about one hour.	Refresh and Open PDF for a new link; never make bucket public.
Size	Backend rejects attachment set above roughly 18 MB decoded / 24 MB base64.	Generated agreement and any allowed attachments remain within limit.
Acceptance	No returned-signature or portal-acceptance step exists here.	Approved execution process captures identity, consent, dates, and final copy.

10 / SAVED RECORDS AND RETENTION

Reconcile the PDF, metadata, delivery evidence, and executed copy

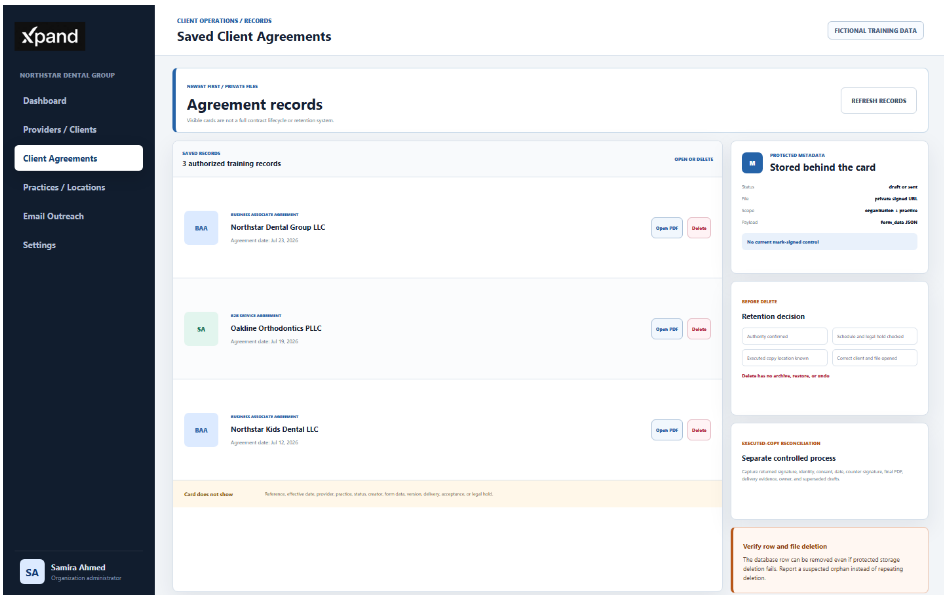

Figure 6. Fictional newest-first saved records with Open PDF, Delete, hidden metadata, status limits, executed-copy reconciliation, and retention controls.

Record control	Current behavior	Operator rule
Card	Shows client, type, agreement date, Open PDF, and Delete.	Hidden reference, effective date, practice, provider, status, and form data still need review.
Open PDF	Creates a signed URL normally valid 3,600 seconds.	Open only for authorized work; refresh after expiry.
Status	Schema supports draft, sent, signed; page creates only draft and sent.	Never mark or describe sent as signed without external evidence.
Version / returned copy	No edit, replace, version, or returned-file upload control.	Govern corrections, amendments, executed copies, and superseded drafts separately.
Delete	Attempts storage deletion, then removes row; no archive, restore, or undo.	Check authority, schedule, legal hold, client, and executed copy before deletion.
Partial delete	Row can be removed even if storage delete fails.	Verify row and object outcomes; report a suspected orphan.

11 / TENANT, PRACTICE, AND DATA PROTECTION

Verify the default-practice owner before Save or Send

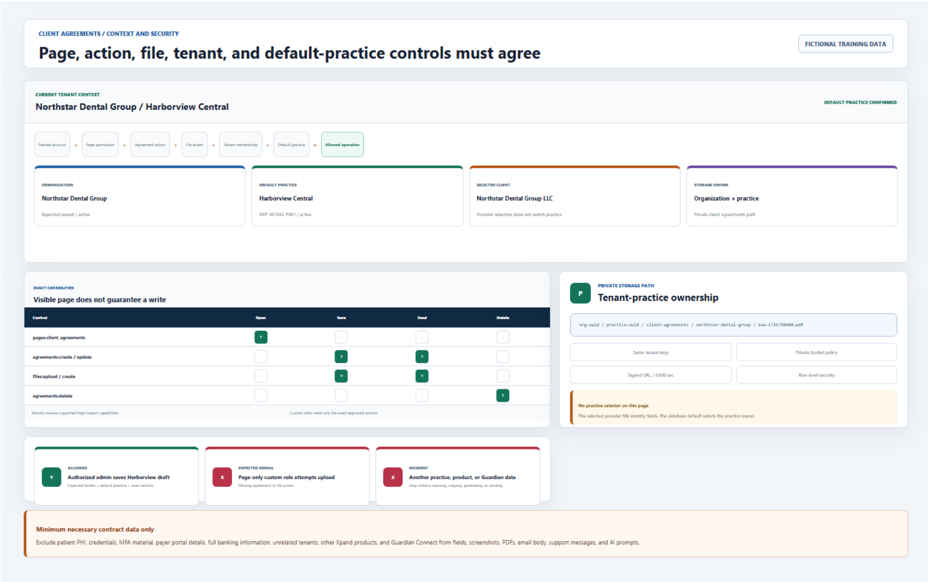

Figure 7. Fictional agreement security board showing exact page and action permissions, current organization, default practice, selected client, private storage path, RLS, allowed work, expected denial, and incident stop conditions.

Control	Repository-backed behavior	Verification
Organization	Row receives current organization and tenant-aware RLS.	Expected client tenant; no other product or Guardian data.
Practice	Row and path use current_default_practice_id(); no page selector.	Active default is the intended agreement owner before persistence.
Provider	Optional provider_id and form auto-fill only.	Selection is not a practice switch; legacy result may have null ID.
Storage	organization/practice/client-agreements/safe-client/type-timestamp.pdf.	Use application actions; never expose, move, or rename object manually.
Authorization	Tenant/practice policy and exact agreement and file actions must pass.	Test allowed work and expected denial with approved fictional accounts.
Minimum necessary	Form is for legal-party and contract terms.	Exclude PHI, credentials, banking, other tenants, Xpand products, and Guardian.

> Wrong practice or cross-tenant data is an incident
> Stop without opening more records, generating, sending, copying, downloading, screenshotting, changing IDs or SQL, making storage public, or asking AI to analyze the exposure. Report only a minimum non-sensitive symptom through the approved Support path.

Practices / Locations	Client Agreements
Practices / Locations	**Client Agreements**

12 / TROUBLESHOOT AND COMPLETE

Resolve the failed stage without widening access or inventing evidence

What you see	Likely cause	Correct first response
Client missing	Archived, outside merged sources, duplicated, or inaccessible record.	Verify canonical client in Providers / Clients.
Name required	Client or practice name is blank.	Select and verify legal identity before generation.
Email required	Recipient is blank or invalid.	Confirm authorized delivery address.
RLS / permission error	Page, agreement, file, tenant, practice, or membership denial.	Review exact access and default practice; do not widen to Admin.
PDF failed	Browser library, network, content, or print behavior failed.	Preserve values, retry once, then report exact action and error.
Saved but email failed	Persistence completed before Gmail call.	Verify record and Gmail, document partial failure, use approved retry.
Link expired	Signed URL passed normal lifetime.	Refresh and Open PDF again; keep bucket private.
No signed status	Current page has no executed-copy lifecycle.	Use approved signing and final-record process.
Wrong practice	Unintended default owned the row and file.	Stop delivery and request approved correction.
Wrong tenant / product	Session, context, cache, integration, deployment, or policy failure.	Stop immediately and report without reproducing data.

Completion check

- I use a counsel-approved, party-specific BAA or service template and verify every legal identity and commercial term.
- I confirm named access, exact agreement and file actions, connected Gmail when sending, expected organization, and intended default practice.
- I read the entire preview, capture signatures only through an authorized process, and never call canvas marks a complete e-sign lifecycle.
- I know Print creates no record, Save creates draft, and Send creates sent before Gmail completes.
- I verify delivery separately from acceptance and reconcile the protected PDF, metadata, executed copy, retention owner, and legal hold.
- I exclude PHI, credentials, banking data, other tenants, other Xpand products, and Guardian Connect, and stop at wrong-practice or cross-tenant exposure.

Next lesson: Continue with Configure organization branding and client context. Also open the website guide, previous lesson, official HHS BAA reference, or all resources.