❖ Software and Programs

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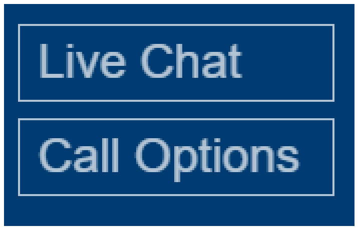
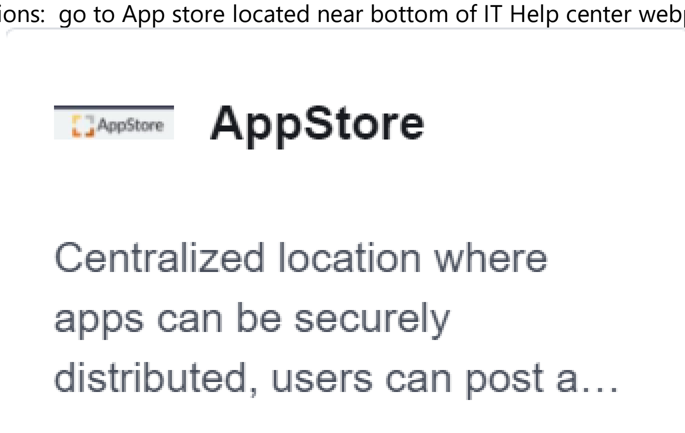
Located on desktop
- 

Located near bottom of IT Help Center webpage
- For the Help Desk, call 888-848-3375, have employee ID ready.
- Applications: go to App store located near bottom of IT Help center webpage.
  - 

Here you can requests apps under ”My Requests”
- RoboForm: Login and password application, Request form App store above.
- Power Bi: data repository, where to find reports
  - [Access Instructions]
  - Updates hourly
  - Common reports LM1 physicians will use:
    - RD Call Center Notes
    - RD LM1 Open Notes and Encounters
- Dragon Medical One app: use is not mandated, but many APCs find that documenting with this improves efficiency greatly.
  - [How to request Dragon Medical One]
  - Access provided to APCs by approval in Secure
- **Outlook including mailboxes**: [Outlook and email support - Optum]
  - Email signature: File -> Options -> Mail -> Signatures

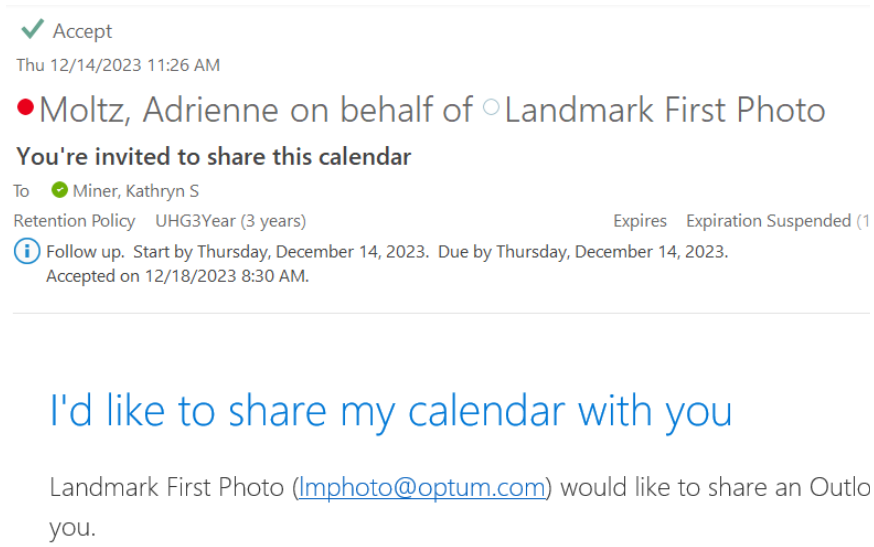
[Firstname] [Lastname] [Optional: he/him; she/her; they/them]
[Title], [business segment or product]
Home & Community | Optum

[Optional: 1-000-000-0000]
[firstname.lastname@optum.com]

[Optional: 1234 Street Name], [Optional: Mail code]
[Optional: City, State ZIP]

- Basic email, create/schedule Teams and Zoom meetings
  - Recommend creating folders for:
    - APC teams
    - Markets covering
    - Ride-a-longs (RALs)
    - Peer Review, ACEs, CAPs
    - Licensing/ Credentialing
    - CPAs
  - ***Optum emails will be deleted after 90 days. ***Save and needed correspondence or materials onto your computer, OneDrive, or add to teams when appropriate.
    - OPA User Guide
    - Instructions to set the retention for folders
    - Detailed instructions to request Outlook archiving beyond 90 days
  - Calendar: All meetings should be populated here. Can create a meeting and place slots of time in OOO (Out of Office) for personal time (Doctor's visits, meetings elsewhere, licensing requirements, etc.)
    - Some meetings will have attachments and agendas.
    - Most meetings will have corresponding email that will ask for RSVP.
    - Change RSVP and inform the holder of that meeting if the meeting is required and you can't attend. Reschedule as needed.
    - Place times in which you do not want meetings scheduled to show OOO so that others know. Examples: daily drop off/ pick up of kids for school, medical appointments, volunteering, etc. that lands within the regular work hours in which you would otherwise be expected to be available.
    - Follow this procedure to Share your calendar with TaShawn Wilson so that she can better assist with scheduling meetings for you.
      1. Gi into your outlook calendar tab and clicking "share Calendar".
      2. Then click "calendar" in the drop down.
      3. A calendar properties pop up box will appear.
      4. Click "add" and type my first name into the search box and press enter.
      5. Double click my name from the list and my name will be added to the calendar properties list.
      6. Once my name is added, select "view titles and locations" under permissions and then click apply.

- Create PTO (or CME) for self:
    - New Items
    - Teams meeting
    - (Name) PTO (or CME)
    - Optional (NOT Required): LM1 Clinical Leadership - name individually
    - Choose dates as all day
    - Options: Out of office
    - Send
- Shared Mailboxes: Mailboxes used by multiple people, most often used as part of managing Triage emails in Genesys
    - Will receive an invite such as this:



Accept

Thu 12/14/2023 11:26 AM

Moltz, Adrienne on behalf of Landmark First Photo

You're invited to share this calendar

To Miner, Kathryn S

Retention Policy UHG3Year (3 years) Expires Expiration Suspended (1

Follow up. Start by Thursday, December 14, 2023. Due by Thursday, December 14, 2023.
Accepted on 12/18/2023 8:30 AM.

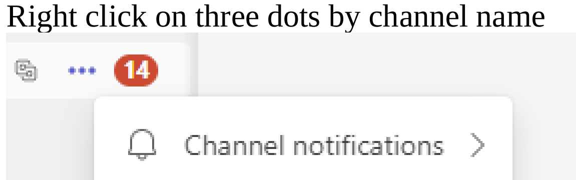
I'd like to share my calendar with you

Landmark First Photo (lmphoto@optum.com) would like to share an Outlo
you.

    - Click "Accept"
    - Video will show you how to add the mailbox to your Outlook. [How to add group mailbox]

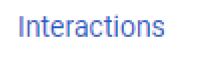
➢ Using Teams including which Teams pages to have, [Teams Meeting Best Practices Optum]

- Majority of meetings, create/schedule in Outlook
- Messages from all markets, LM1, chats occur throughout day/night
- LM1 Docs:
    - Chat ongoing
    - Channel: for more major announcements, storing files
- Adrienne to assign required Teams pages, LM1 AMD should have:
    - LM1 Full (APPs and PCCs)
        1. LM1 Full APP and PCC team channel (includes optum)
        2. Important Announcements
        3. Kudos Channel
        4. Systems Issues (with Optum)
    - LM1 APC Channel (Includes Optum)
        1. General
        2. Escalations

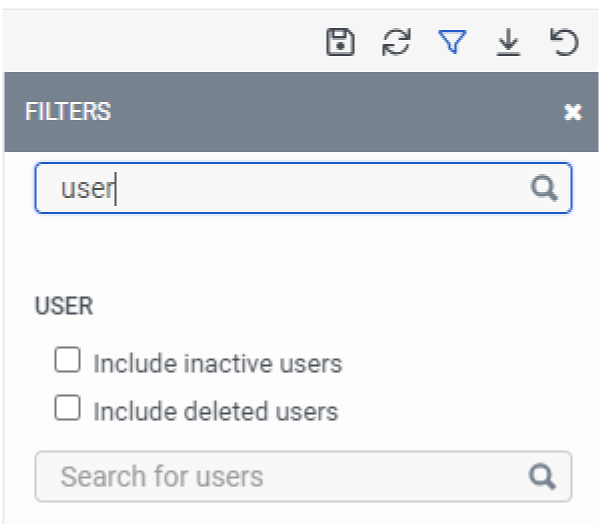
        3. Team Support (APC TL and Doc of the Day): where those providing team support and Doc of the Day coverage posts their presence and where clinicians can post questions.
    - LM1 TIQ (Training, Implementation, and Quality): Contains Reference Documents, Admin and Clinical Reference manuals, other basic work files
    - LM1 Attendance Tracker: for the attendance tracker/ Unplanned PTO tracker, under files, managed by WFM.
    - LM1 Leadership Meeting: Weekly notes to guide Monday meeting discussions and keep tabs on ongoing projects.
    - LM1 Clinical Leadership: Not connected to a meeting, but includes Team Leads, Physicians, trainer(s), and other main LM1 Leadership. Contains APC TL coverage gaps and Territory divisions files.
    - UE Operations: Invite through Tom Charlton. Optional.
    - Market Teams pages will populate your Teams pages as Adrienne add you. Some of these you can suppress if you are not following those markets. LM1 Physicians do not commonly keep track of every posting on the Market teams channels they are a member of.
    - Workforce (Reporting)
    - May make your own Teams page to include your APCs, and include both Landmark and Optum users as well transition. This can be useful for updates regarding your PTO, time available for RALs, or other updates.
    - Tutorial on how to make your own Teams pages: [Job Aid, Collaborating on Teams]
    - How to silence a Teams channel:
        1. Right click on three dots by channel name
        2. 

        3. Select OFF
        4. Silencing a channel will only give the notifications that include you specifically
  - Teams Calendar: mirrors Outlook Calendar, click on meeting to Chat, find past meeting notes
- Using Humanity: Who is working/on call when and where
  - Shift planning
  - Markets: Who is on
  - Landmark First: Find schedules of APCs
  - [Landmark First Humanity reference document]
- IEX: as of June 2024, this is the scheduling software program for LM1 PCCs, RNs and APCs not in leadership roles.
  - [LM1 Leadership IEX training video]
  - LM1 APCs and RNs will use this to see their schedules, make schedule requests, and request time off.

- If an APC "calls out" for their shift, IEX will send an email to the AMD they report to who will then need to forward this to lm1attendance@optum.com so that the UPTO is recorded and tracked.
- IEX inquiries can be sent to : HouseCallsWFM_DL@ds.uhc.com

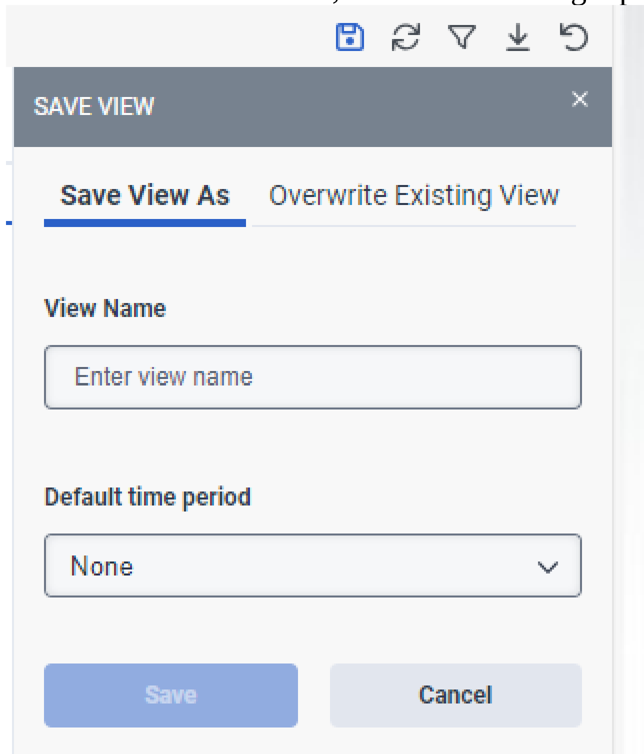
➢ Genesys: Our Telephony system. Below are the basic trainings that will include how to listen and download a call, and view statuses. I will include the instructions for two workflows not included in the trainings.
  - Genesys Supervisor training video and PowerPoint
  - Genesys Mobile Application Training Video
  - Training video for all
    - Agent training PPT
    - Operation training PPT
  - Creating a team in Genesys:
    - Performance _> Workspace->  to create new tab -> 

on left
    - Find filter and search for user

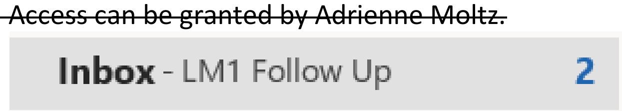


    - Search for APC in "search for users". This will add that user to this profile and their calls for that date will show up.
    - To change the date, click on the date shown in the middle and change to what time frame you want to include.

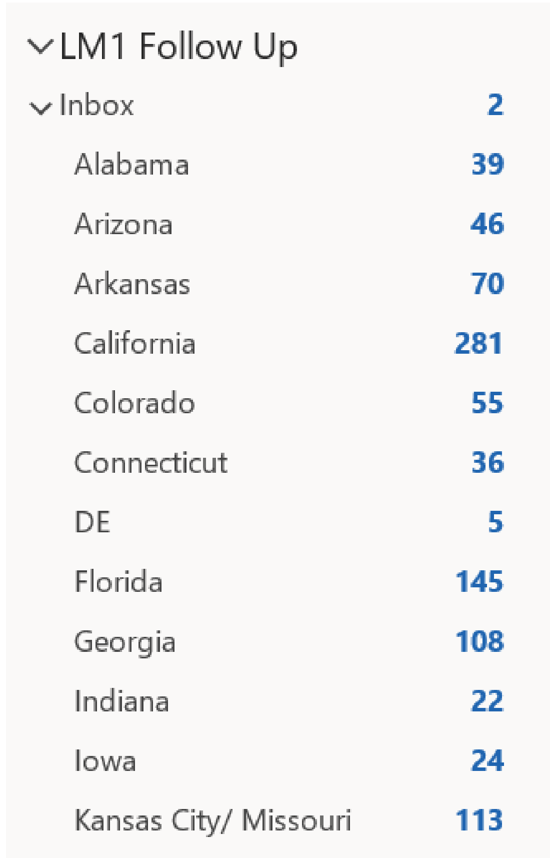
- To rename view and save, hit save icon in right panel.



- ~~Management of the Triage email box does require access to the LM1 Follow up box. Access can be granted by Adrienne Moltz.~~



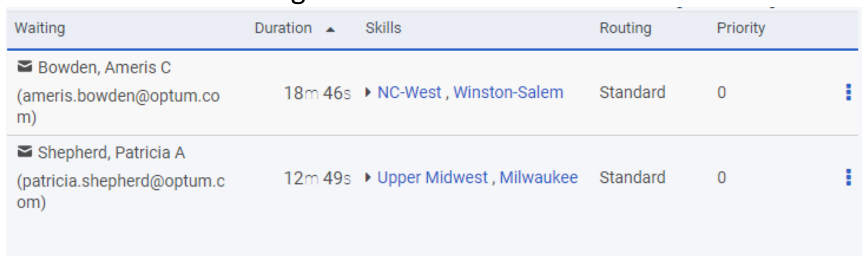
- ~~Once granted, set to Favorites.~~
- ~~Additional access will be needed to the State/Market subfolders (~35 in total) in order to categorize and store email triages that have been completed.~~



~~(example)~~

- ~~Triage Mailbox monitoring: Occasionally LM1 physicians may be needed to help with triage mailbox support and assign those triage emails that have been waiting for =>55 minutes as it is our goal to call the patient back within one hour of their first contact with LM1.~~
    - ~~Triage emails typically are created when a patient/caller calls LM1 and communicates with a PCC or market staff member. If the PCC cannot find an LM1 Clinician (RN or APC) for that patient's market available and there is not a buzzword, the concern will be placed in the Triage mailbox and auto assigned to the next LM1 Clinician when they become available. Our goal is to call the patient back within one hour.~~
    - ~~If the triage email is not auto assigned in 55 minutes, it will roll over into a separate email triage box that can be monitored.~~
        1. ~~Within Workspace, create a new tab by clicking the "+", Queue Activity, APP Email Escalation.~~
        2. ~~This view can then be saved and named according to your preference, for example: ">55 minutes".~~
    - ~~It is the task of the PCC lead or TL (Or LM1 phsyician) on to assign to the next appropriate Clinician to help avoid delay, or send back to the market for market owned management.~~
    - ~~It is important to have the Online Agents Genesys tab open, as well as the Humanity schedule for the day showing all the Clinicians working, and the RN and APC Licensing and Credentialing list to~~

~~refer to incase there is a Clinician not in the appropriate skill in Genesys to have the email triage automatically sent to them. If it's found that a RN or APC is not in the appropriate skill, send an email detailing this to WFM.~~



Waiting	Duration	Skills	Routing	Priority
Bowden, Ameris C (ameris.bowden@optum.com)	18m 46s	NC-West , Winston-Salem	Standard	0
Shepherd, Patricia A (patricia.shepherd@optum.com)	12m 49s	Upper Midwest , Milwaukee	Standard	0

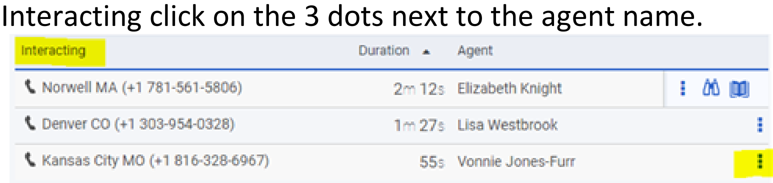
- ~~In the lower left of the Online Agents tab will be the Mailbox as above. It will contain the name of the PCC who took the patient call and sent the email, the duration of time the triage emails has been waiting, what skills are needed by the Clinician to answer the email (call the patient back and triage them).~~
    1. ~~Clicking on the skills will show to the right of the mailbox all the Clinicians in that skill who are logged on to Genesys at that time.~~

Filter user(s) Online Agents Skill: Cincinnati Clear All 1 - 4 of 4 active agents 0 inactive agents

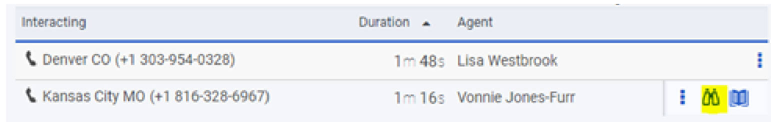
Agent	Time in	Status	Skills	Duration	Media Types
Julie Crotzer	3m 3s	Interacting	Arizona , Arkansas , Atlanta , Baltimor...	3m 3s	
Katie Miner	16m 13s	Available	AL , Albany , Arizona , Arkansas , Atlan...		
Mandy Heaton	3m 58s	Interacting	Cedar Rapids , Chicago , Cincinnati , Cl...	3m 58s	
Michelle Chaffen	50m 53s	Busy	Albany , Arizona , Bay Area , Birmingha...	50m 59s	

    2. ~~Here we can see who could be next in line to receive that email triage automatically and, by comparing to Humanity and the RN and APC Licensing and Credentialing list, who else could be available but not skilled in that market.~~
- ~~When an email triage has been in the box for 55 minutes:~~
    1. ~~Go "On Queue"~~
        1. ~~This will route the email triage to you.~~
        2. ~~Answer the email triage. This will open the email up.~~
        3. ~~Go off Queue. (some elect to stay on Queue during the entirety of the time managing the box. Others elect to manually go on and off Queue to avoid getting back to back email triages sent to them that may cause confusion.)~~
        4. ~~It is also important to have an idea of the schedule of the PCC you are sending the email triage back to and this can be found on Humanity or on the PCC Dashboard. If the PCC is off or is close to the end of their shift, contact the PCC Lead who can help escalate the email triage to the next available PCC.~~

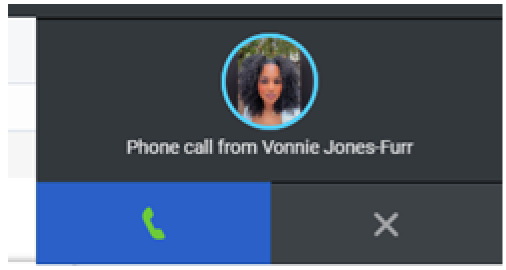
        5. ~~Copy the patient name and ID # from the subject line.~~
        6. ~~Click Reply and the Include message history.~~
        7. ~~Reply with "There are no LM1 Clinicians to manage, please contact the daytime clinician or on call provider to manage" and paste the patient name and ID#.~~
        8. ~~Copy the verbiage you just wrote in the reply along with the patient name and ID#.~~
        9. ~~Click Send.~~
        10. ~~On the right column choose "Transfer to the Market Provider" as the wrap up code, and close.~~
    2. ~~In the LM1 Full APC and PCC Teams Channel, create a new post tagging the PCC you sent the email triage back to, and paste the body of your email response in the message.~~
        1. ~~Flag autogenerated email in the Outlook Follow up box.~~
        2. ~~Make sure the PCC has acknowledged the post with a thumbs up (or equivalent).~~
    3. ~~In the Outlook LM1 Follow up box, once the triage email has been taken care of and either the patient has been called back and/or managed, this email can then be placed in the appropriate state subfolder.~~
    4. ~~We can also request the market sender escalate to the market clinician to manage using similar language as above, "There are no LM1 Clinicians to manage, please escalate to market clinicians to manage."~~
    5. ~~If the original sender of the email triage is no longer on shift or not responding, Reach out to the PCC Lead on.~~

- Monitoring a Live call in Genesys:
    - Monitoring allows you to listen to an interaction without disturbing the conversation between the agent and the customer. Neither the customer nor the agent are aware that you're monitoring the interaction.
    - Coaching allows you to drive improvements by offering comments and advice to the agent during the interaction. Customers are not aware of the coaching session and cannot hear your conversation with the agent.
    - Under Interacting click on the 3 dots next to the agent name.
        1. 

- Click on Monitor Conversation

1. 

- Click on the green phone icon to accept the call.

1. 

- [Step-bystep guide on how to monitor and coach agents during calls using a different approach.]()

▪ Other helpful Genesys tips include hitting refresh to get the most up to date view.

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➢ Using Trident care for Imaging results
  - [Connectonline.tridentcare.com]()
  - [APC workflow for responding to Trident Care referrals]() FYI
  - Originally coordinated by the Ops team, [lorelei.schmidt@tridentcare.com]() is primary contact for system administrator issues, etc.

➢ Using RightFax for faxes
  - Follow the steps outlined below to gain access
    - **Visit the [UHG IT Provisioning Portal]()**, click the tab for **Enterprise Fax**.

        - In the left column click **New / Create** (or any of the other topics available if desired).

        - As you fill out the form pay attention to the section named **Enterprise Fax Information**.
    - If you are NOT to receive inbound faxes make sure to select the **No** radio button.
      Important! An inbound fax number is not required for you to have the ability to send electronic faxes.
    - Make sure that the **Fax Delivery File Format** you request is compatible with your Business Units needs.

    - Submit request.
    - Once approved, use the URL : https://efxprodc.uhc.com/rightfax/user/ to log in
        - User name is MS\MSID for example mine is ms\mberolo
        - Password is the MDIS PW
    - [OAH Leadership and Market Mapping]()

- Using Concur: Where you will see Approvals, for approval of APC CME/travel/memberships/etc.
    - <u>Courses that are “staffing expense” not out of personal CME:</u>
        - CA: 45 hour prescriptive authority course
        - FL: Nursing laws and rules (Again, Florida has a bunch of categories that they want education on. However, this specific requirement stand out as presumably covering Florida specific laws and rule).

        - KY: Suicide prevention; implicit bias
        - NJ: Organ and tissue recovery and donation
        - NY: child abuse; infection control
        - OH: 2 hours on OH laws governing drugs and prescriptive authority
        - PA: Prescriptive authority; child abuse
        - TX: Jurisprudence, human trafficking (a course that must be approved by TX H&HS)
        - WA: Suicide prevention
    - Also where you place expenses for reimbursement: CME, Travel costs, licensure costs, etc. Be sure to include any CME certificates when asking for reimbursement for CME. APCs will have to do the same. And make sure the receipts include the last 4 digits of your Credit card.
    - OPS Expense Reimbursement policies
    - Travel: Can estimate travel costs through flight search; travel requires the Home and Community approval form
        - APCs will also need this form filled our BEFORE they are granted CME time by WFM. APCs will need this form signed by their manager (LM1 physician) to then send to WFM for approval of the CME days requested.
- Clear Triage: Software program used by the LM1 RNs during patient calls. Nearly 7000 LM specific dispositions based on caller symptoms.
    - Dispositions as of June 2023
    - Policy

Repurposing Dispositions: Customizing for Landmark First

Current Dispositions	New Dispositions
Call EMS 911 Now	Call 911 NOW (Notify escalation afterwards)
Go to ED Now	Go to ED/UC
See HCP within 4 Hours	Urgent Escalate to Clinician
See PCP within 24 Hours	Non-Urgent Escalate to Clinician
Call PCP within 24 Hours	Dispatch F2F (UE or market)
See PCP within 3 Days	Ubiquity note
See PCP within 2 Weeks	Refer to OB
Home Care	HHC
	Refer to Hospice

2

- Quest: Diagnostics ordering platform and where to find results. Will be commonly used by APCs who are looking up results for patient care and by the APC TLs throughout the day.
    - LM1 Quest Training video
    - Lab Specimen Collection
    - Lab Specimen Handling Policy
    - Critical Lab Results
- NENA 911 Database

- https://eprc-nena.hub.arcgis.com/pages/nonpsap
- Launch application by clicking on “Launch EPRC Online Portal” blue button in the center of the screen.
- At log-in retrieve your username and reset your own password.
- PLEASE DO NOT EMAIL NENA DIRECTLY. Issues can be escalated to Tom Charlton and Stacy Hittner.
- 911 Database training video

➢ One Healthcare ID: Formerly known as Optum ID, needed for some Optum applications including Xyleme and upcoming video visit platforms (OCM)
- https://optum.bravais.com/adminportal/
- Signing in
- Creating an account
- Retrieving your One Healthcare ID
- Resetting your password
- Unlocking your account
- Managing your profile
- For urgent matters: 1-855-819-5909

➢ Visio: An application that helps make workflow charts. Request can be made through the Optum App store, request “Microsoft Vision Standard 2019”

➢