

# Landmark First

## Patient Care Coordinator (PCC) Guidebook

### Topic Selection

Click on one of the section titles below to get started:



[LM1 PCC Job Overview](#)



[General Call Management](#)



[Administrative Workflows](#)



[Local Metro Call Transfers](#)



[Non-Urgent Clinical Calls](#)



[Urgent Clinical Call Transfers](#)



[Call Documentation](#)



[LM1 PCC Call Audits](#)

# LM1 PCC Job Overview

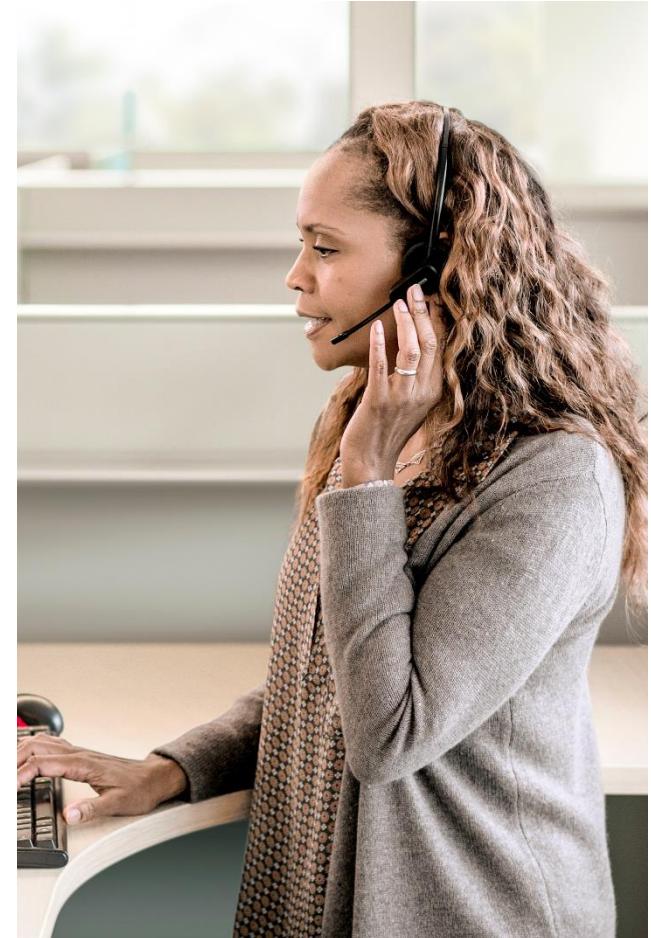
## Table of Contents

- [Job Summary](#)
- [Resolution Scope](#)
- [Shift Start / Shift End Guidelines](#)
- [Genesys Status Tracking](#)

## Job Summary

Landmark First Patient Care Coordinators (PCCs) are the first point of contact for incoming calls from patients, caregivers, or community providers. They are often the first voice that patients will hear when calling with questions, concerns, or requests for medical service. Throughout a shift, LM1 PCCs can expect to.

- Answer incoming calls, callback requests, and messages.
- Administrative tasks including appointment updates, contact updates, confirmation updates, and fulfilling requests for information; if able.
- Transfer callers to local metro office staff or remote LM1 Clinicians.
- Transfer medically or urgent calls through the appropriate channels and secure assistance for the patient as necessary; including EMS contact.
- Accurately document patient / caller interactions for reporting, compliance, and quality assessments.



## Resolution Scope

Landmark First Patient Care Coordinator workflows include the resolution of:

### Appointment Reschedules

LM1 PCCs may reschedule the following appointments:

- Initial Visits (IV)
- Initial Visit 2 (IV2)
- Maintenance Visits (MV)
- Palliative Prognosis Visits
- Palliative Management Visits  
*(if not scheduled by a PCMD)*

### Appointment Confirmations

LM1 PCCs may confirm all appointment types.

*(Need Screening Information)*

### Internal Consult Transfers

If LM1 PCCs are unable to resolve a caller's request, or if resolution is included within LM1 PCC workflows, a remote or local office consult transfer may be necessary.

- Follow the Non-Urgent, Urgent, and Immediate Emergency Action Clinical call workflows.
- Contact Visiting Clinicians or local Care Coordinators to complete appointment scheduling or rescheduling outside of the LM1 PCC scope.
- Transfer callers responding to voicemails or messages to their original point of contact.

### Additional Administrative Work as Needed

Other administrative work may include:

Documenting general updates or messages.

Updating the patient's authorized contact, primary phone, or Visiting Address information.

Providing general information about the company and the services we provide to patients.

Creating Tasks or actions in Ubiquity for local follow-up.

## Shift Start / Shift End Guidelines

### Beginning Your Shift

- Review any changes to shift, breaks, or PTO requests in IEX, as needed.
- Greet your co-workers with a brief chat message in the LM1 PCCs team.
- Review any announcements or updates posted in Teams or received in Outlook.
- Put yourself “On Queue” in Genesys to start taking incoming calls and messages.

### Application Checklist:



IEX Web Station



Humanity



Microsoft Teams



NENA 911 Database



Outlook



Ubiquity



Genesys Cloud

### Ending Your Shift

- Report your time using Global Self Service (GSS).
- Logout of Genesys.
- Finalize any open Notes you entered in Ubiquity.
- Check and respond to any emails addressed to you.
- Say goodbye to your peers in Teams chat.
- Close IEX Web Station

### Web Application Links

*Links to Humanity, Genesys, and NENA may be retrieved from the [Company Resources & Employee Reference Job Aid](#) document. For ease of access, please bookmark these applications or save them as shortcuts on your desktop / task bar.*

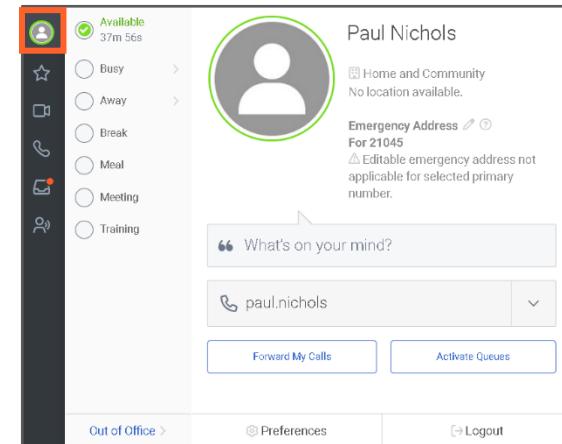
### Application Access Issues or Broken Links

*If you encounter issues while opening an application, or if your access to an application is denied, please follow the Troubleshooting Systems Issues process detailed in the [Company Resources & Employee Reference Job Aid](#) document.*

## Genesys Status Tracking

Throughout your workday, you will need to indicate your current activity using the status options available in Genesys:

Status	When to Use	Recommended Time Limit
On Queue	Used to take all incoming calls	Whenever you are working your shift and ready to take calls
Not Responding	Automatically assigned if you fail to answer an incoming call or message	Make yourself available for interactions as soon as possible
Available	Status to take Internal Calls Only	Do not use
Meal	Only to be used for lunch breaks.	30 minutes for a standard shift
Away	For bathroom breaks and misc.	Notify Supervisor
Breaks	Only to be used for scheduled breaks	15 minutes
Meeting	Only to be used for meetings.	Length of meeting
Training	Used during scheduled trainings	Length of training
Busy	Use sub-statuses only	(see the sub-status table)



### Going “On Queue” in Genesys

The On-Queue status can be set by switching the toggle in the upper-right corner of your Genesys window, or by clicking the “Go On Queue” button in the “Interactions” pane.

- Please note that “Available” and “On Queue” are two different statuses. If you change your status from “On Queue” to “Available”, you will be taken off queue immediately and no longer receive incoming calls.
  - The “Available” status will allow you to receive internal calls only.

## Sub-Statuses

Selecting the “Busy” or “Away” status will open an additional menu of sub-statuses to choose from:

Status	Sub-Status	When to Use	Recommended Time Limit
Busy	Answering Service	Used while reviewing / responding to an answering service message	While reviewing / responding
Busy	Busy	Do not use	(None)
Busy	Callback	While locating a patient in UB for a callback	-1 Minute
Busy	Documenting	Documenting Ubiquity + Email on patient's behalf	5 Minutes (Training / Onboarding)
			Set by Supervisor or Manager
Busy	Triage	When a triage request is received by a clinician	Determined by Clinical Leadership Teams
Busy	Urgent Visit Documentation	Used by clinicians documenting Urgent Visits	Determined by Clinical Leadership Teams
Busy	Urgent Visit Oversight	Used by clinicians providing oversight for an Urgent Visit	Determined by Clinical Leadership Teams
Away	Away	Do not use	(none)
Away	Personal	Bathroom breaks (example)	-10 minutes
Away	System Down	When there is a system or application issue that prevents call management.	Follow the <b>Troubleshooting Systems Issues</b> guidelines.

- If your ACW exceeds the recommended time limits, please notify your Supervisor immediately.

## Documentation & Idle Time

The following conditions may apply to after-call documentation:

- Unless otherwise instructed, use the Busy → Documenting status in Genesys while completing after-call documentation.

If call volume is low, you may be instructed to go On-Queue while completing after-call documentation. This is referred to as "Idle Time" and is initiated at the discretion of a Supervisor.

- Idle time is implemented to keep the call "Abandon" statistic low and allows us to best assist our patients.
- If you receive a call while documenting during Idle Time, save your current work and answer the call in Genesys. Live calls will take priority over after-call documentation until the call is ended.

## Personal Time

The following conditions apply to Personal Time applied during your shift. Supervisors will monitor an employee's use of personal time and ensure everyone is held accountable to the same standard:

- Personal Time should not be used daily.
- Personal Time should not exceed 10 minutes.
- Notify a Supervisor via Teams chat whenever you need personal time before leaving your desk.
- Personal time should not be used as an extra break.
- Personal time requests may be denied during high call volume periods or when short-staffed.
  - Please use breaks and lunchtime wisely.



## Teams Communications

. LM1 PCCs are expected to check Teams groups and chats periodically for tags, mentions, or important announcements throughout their workday.

Teams is the primary communication tool between supervisors and agents when status or queue activity must be updated to meet patient / caller needs.

## Completing Call Wrap-Up

After each call, you must complete a Wrap-Up Code to provide a brief record of the call type that was handled. The full list of Wrap-Up Codes will become available in Genesys automatically after a call ends. Please match your Wrap-Up Code to the type of call that was handled:

- LM1 – 911 Activated
- LM1 – Call Disconnected
- LM1 – Cancel Appt
- LM1 – Clinically Managed
- LM1 – Confirm Appt
- LM1 – ER Advised
- LM1 – In-Person UV Dispatched (Clinicians Only)
- LM1 – Market Request
- LM1 – No Answer
- LM1 – Non-Patient Related
- LM1 - Outreach
- LM1 - PCC - Urgent Clinical Transfer (Buzz)
- LM1 – Reschedule Appt
- LM1 – Return Call
- LM1 – Transfer to LM1 Clinician
- LM1 – Transfer to Market Clinician
- LM1 - Voicemail
- LM1 – Wrong Number

The screenshot shows a software interface for selecting a wrap-up code. At the top, there are several small icons: a user profile, a double quotes icon, a document icon, a calendar icon, and a checkmark icon. To the right of these is the text "After Call Work" and a timestamp "0:57". Below this is a search bar with the placeholder "Find wrap-up code" and a magnifying glass icon. A vertical list of wrap-up codes is displayed, each preceded by a blue link. The list includes: LM1 - 911 Activated, LM1 - Call Disconnected, LM1 - Cancel Appt, LM1 - Clinically Managed, LM1 - Confirm Appt, LM1 - ER Advised, LM1 - In-Person UV Dispatched, LM1 - Market Request, LM1 - No Answer, LM1 - Non-Patient Related, LM1 - Outreach, LM1 - PCC - Urgent Clinical Transfer (Buzz), LM1 - Reschedule Appt, LM1 - Return Call, LM1 - Transfer to LM1 Clinician, LM1 - Transfer to Market Clinician, LM1 - Voicemail, and LM1 - Wrong Number. At the bottom of the screen, there is a message box with the text "Wrap-up code is required" and "Select wrap-up code" next to a checkbox. To the right of this message box are two buttons: "Done" and another button whose text is partially visible.

# General Call Management

## Table of Contents

- [Inbound Call Greeting Guidelines](#)
- [Outbound Call Greeting Guidelines](#)
- [Voicemail Guidelines](#)
- [Courtesy, Empathy, & Active Listening](#)
- [Manage Verbally Abusive Calls Guidelines](#)
- [How to Contact the Interpreter Line](#)

### [HBMC Interpreter Services Policy](#)

A policy that details the accepted use of the Interpreter Line

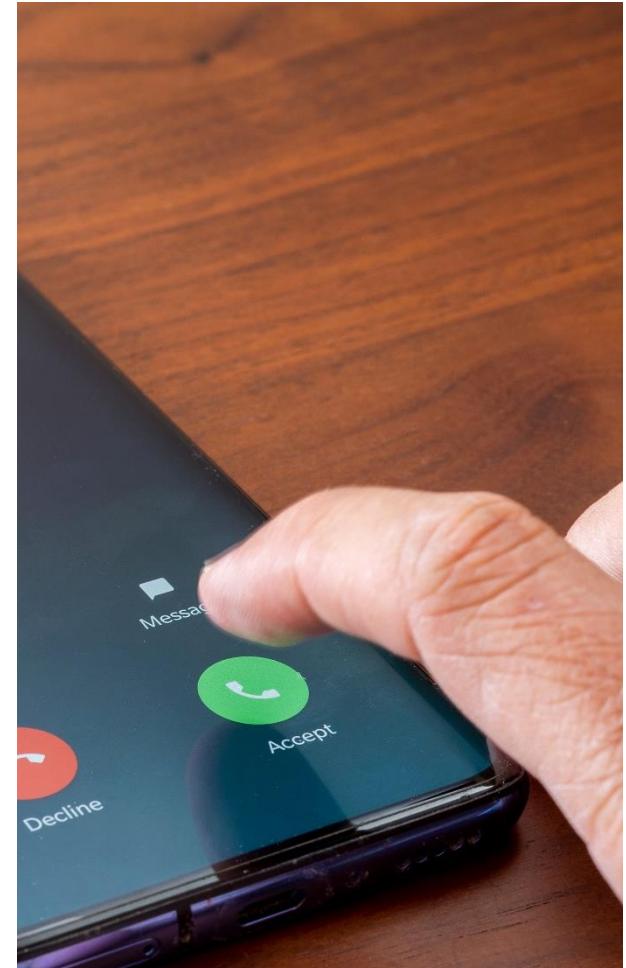
### [HBMC Language Assistance and Interpreter Services Procedure](#)

Detailed instructions for calling, and navigating the auto-response menu of, the Interpreter Line.

### **Patient HIPAA Verification & Caller Authorization Guides**

*This section is intended to provide an overview of caller communication.*

*To review specific patient verification and caller authorization requirements, please reference the [Company Resources & Employee Reference Job Aid](#).*



## Inbound Call Greeting Guidelines

LM1 PCCs are expected to use the following suggested script to greet callers:

1

### Organization & PCC Introduction

The inbound call greeting should introduce the following:

- Organization
- LM1 PCC by first name
- LM1 PCC by Job Title

2

### Gather Patient Details

Proceed with the HIPAA verification steps by asking for:

- The Patient's Name
- The Patient's Date of Birth
- The Patient's Full Address

Alternatively, the patient's full phone number may be used for verification purposes.

3

### Callback Number Verification

Obtain a valid callback number in case of call disconnection.

**\* Please note that the phone number displayed by Caller ID may not be the caller's preferred contact number.**

#### Suggested Script

*"Thank you for calling Landmark First. My name is (your first name), Patient Care Coordinator."*

#### Suggested Script

*"May I please have the patient's first and last name to access their chart?"*

*"Thank you for that information. As a final step to verify that I have the correct patient's chart open, may I please have the patient's full address?"*

#### Suggested Script

*"Thank you. As a final step, can you provide me with a callback number where I can reach you if we get disconnected?"*

## Outbound Call Greeting Guidelines

When starting an outbound call to a contact outside the organization, LM1 PCCs are expected to:

- Request to speak to the specified contact as listed in the callback request, answering service message, or chart.
- Inform the contact that they are on a recorded line

1

### Organization & PCC Introduction & Contact Specification

The inbound call greeting should introduce the following:

- Organization
- LM1 PCC by first name
- LM1 PCC by Job Title

In addition, indicate that you are calling on a recorded line and ask to speak to the specified contact.

#### Suggested Script

*"Good morning / afternoon. My name is (your first name) and I'm a Patient Care Coordinator with Landmark First calling on a recorded line. May I please speak to (specified contact)?"*

2

### Gather Patient Details

Proceed with the HIPAA verification steps by asking for:

- The Patient's Name
- The Patient's Date of Birth
- The Patient's Full Address

Alternatively, the patient's full phone number may be used for verification purposes.

3

### Callback Number Verification

Obtain a valid callback number in case of call disconnection.

***\*Please note that the phone number displayed by Caller ID may not be the caller's preferred contact number.***

#### Suggested Script

#### Suggested Script

*"May I please have the patient's first and last name to access their chart?"*

*"Thank you for that information. As a final step to verify that I have the correct patient's chart open, may I please have the patient's full address?"*

#### Suggested Script

*"Thank you. As a final step, can you provide me with a callback number where I can reach you if we get disconnected?"*

## Voicemail Guidelines

If you are unable to reach a patient, caregiver, community provider, or any other specified contact outside the organization:



### Voicemail Specifications

#### Leave a Brief Voice Message for the Specified Contact

Your message should include:

- Your first name and job title
- The organization you are calling from
- Provide the toll-free Landmark phone number: 657-400-2480

#### Suggested Script

*"Good morning / afternoon. My name is (your first name), calling from Landmark First to follow up on the message that you left for us. Please give us a call back at 657-400-2480 and our staff will be able to continue this conversation with you. Thank you.*

#### Never Share PHI in Voicemails

**DO NOT** share any protected health information (PHI) when leaving voicemails. Doing so is in violation of HIPAA and may result in disciplinary action up to, and including, termination of employment.

#### Leave Voicemails For:

- Patients & Caregivers
- Community Providers
- Social Workers
- Home Health services
- All other callback requests

#### **DO NOT** Leave Voicemails for:

- APC Queue in Genesys
- RN Transfer Queue in Genesys
- On-Call Providers

## Courtesy, Empathy, & Active Listening

Please use at least one (1) empathy phrase and 2 (two) courtesy statements during your patient / caregiver calls. Using such language can:

- Deescalate a call
- Help a caller feel more comfortable communicating their concerns
- Build a caller's confidence in our ability to resolve their concerns
- Indicate to the caller that they have been listened to

Both empathy and courtesy phrases are required items on the PCC Call Audit Score Card. Please see the Call Quality Review & Scoring section for more information

### Courtesy

A statement to convey politeness and respect.

### Empathy

A compassionate statement made to acknowledge, affirm, and validate the emotions of others.

- The most effective empathy statements are born from active listening and should be made in direct response to a caller's concern.

### Call Audits & General Performance Feedback

Your use of courtesy statements, empathy statements, and active listening skills will be assessed during regular call audits and may affect your overall score rating.

If a lack of courtesy, empathy, or active listening leads to poor call performance, supervisors will provide coaching and feedback during one-on-one meetings.

Courtesy Examples	<i>Empathy Examples</i>
<ul style="list-style-type: none"><li>• <b>May I please have the patient's name?</b></li><li>• <b>"Thank you for that information."</b></li><li>• <b>"Have a nice day."</b></li><li>• <b>"I'm sorry, I didn't catch the last thing you said."</b></li></ul>	<ul style="list-style-type: none"><li>• <b>I'm sorry your having trouble refilling your prescription.</b></li><li>• <b>I'm glad your headache is gone.</b></li><li>• <b>I hope you recover from your cold soon.</b></li><li>• <b>I appreciate that you called us with this update.</b></li></ul>

## Active Listening

Active listening is a must-have skill when speaking to callers as it leads to:

- Building trust in your ability to resolve the concern, and in the organization.
- Resolving frustrations and impatience during wait times.
- Better understanding of the problem a caller is facing.
- Increasing probability of concern resolution with a single call.

When contacting Landmark, our callers:

- Are struggling with multiple ongoing health conditions.
- Might be experiencing physical or mental anguish.
- Are looking for guidance from someone they have never met in person.
- May be overwhelmed with information or emotion.
- Need to hear a compassionate voice.

The best active listening is achieved when:

- Personal distractions are removed from the work environment.
- The caller is not interrupted while voicing their concerns.
- Repeat / mirror the caller's concern to clarify understanding.
- Ask the caller to clarify / repeat themselves when necessary.



### Communication & Understanding

*We all communicate differently and with that, we all face challenges and barriers when expressing our thoughts and ideas.*

*Some of our patients may have physical or mental impairments that effect speech. Alternatively, they may speak with inflections or use phrases that you are unfamiliar with.*

*You can facilitate clear communication by asking follow-up "yes" or "no" questions to better understand their concern.*

*Finally, **NEVER** raise your voice to a caller in anger or frustration.*

## Manage Verbally Abusive Calls Guidelines

If a patient, caregiver, or any other caller becomes verbally abusive during a call:

- **DO NOT** raise your voice to the caller or reciprocate their abusive language.
- Remember that the patients we serve may suffer in ways we do not know about due to their clinically complex conditions.
- Lead with kindness.

1

### Attempt De-Escalation

Acknowledges the caller's frustration:

- Inform the caller that you are making every effort to address their concerns.

2

### Establish Boundaries

Establish a boundary by clearly stating the behavior you find offensive.

- Kindly ask the patient to refrain from behaving in an offensive manner.

2

### Establish Boundaries

Inform the caller that you are ready to end the call due to their continued use of profanity or abusive language.

- If the situation does not improve, end the call.

#### Suggested Script

*"I understand that this is frustrating and I will try my best to resolve this for you as quickly as possible."*

#### Suggested Script

*"I would like to assist you, but please refrain from using profanity."*

#### Suggested Script

*"I am disconnecting the call due to your continued use of profanity. Please call back at a later time."*

## Reporting

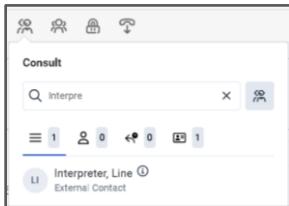
1. Use a private chat in Teams to notify your supervisor of the call escalation immediately.
2. Follow **Call Documentation** guidelines when noting the interaction in Ubiquity:
  - **DO NOT** include details of the verbal abuse in your Ubiquity Note as Notes should be care-focused.

## How to Contact the Interpreter Line

The interpreter line can be called from the Interactions pane in Genesys or consulted as part of an ongoing call. Search "Interpreter Line" in the pop-up address book or dial (844) 447-1667.

1

### Call / Consult the Interpreter Line



If part of an ongoing call, use the **Consult** option in Genesys and find the Interpreter Line in the address book.

2

### Language Selection



When prompted, use the on-screen dial pad to press **1** for Spanish, or **2** to specify a different language.

3

### Employee Identification



When prompted, use the on-screen dial pad to enter your **9-digit** employee ID. Include any 0's that appear at the beginning.

4

### Specify State / Region

After your 9-digit employee ID is entered correctly, an interpreter will join the call. They may ask for the patient's state / region.

Please provide the market / metro information for the patient.

5

### Resume the Call

When ready, take the original caller off hold so that you, the interpreter, and the caller and all speak to, and hear, one another.

Allow time for the interpreter to introduce themselves.

5

### Complete the Call

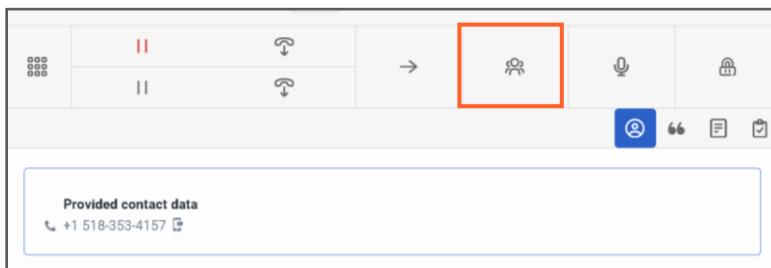
The presence of an interpreter does not alter any existing administrative or clinical workflows. Proceed with the call normally while allowing time for the interpreter to translate your words and the caller's responses.

## Interpreter Line Handoff / Transfer Guidelines

During a call, it may become necessary to transfer the caller and interpreter to an available LM1 Clinician or market staff. Unfortunately, there are no quick options to do this in Genesys, but the following workflow makes it possible:

1

### Switch Your Consult Call to a Conference Call

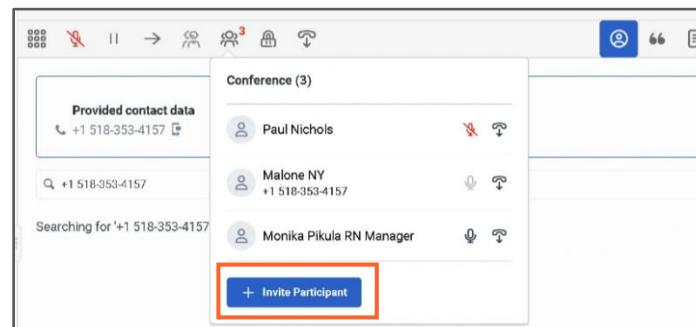


While in a **Consult** call with a patient and interpreter, select the "Conference" option from the dashboard.

Please note that selecting the **Conference** option will allow all participants to speak to, and hear, one another.

2

### Use the "Conference" Option to Add Contacts to the Call



From the new dashboard, select the **Conference** option again to open a list of current call participants. Click "Invite Participant" to search for new contacts to bring into the call.

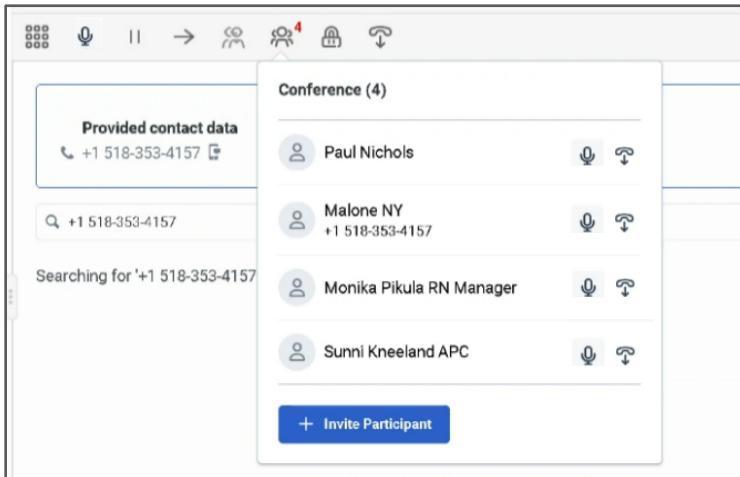
The participant you add should align with current call transfer workflows based on the caller's request.

You may select queues or contacts from the address book or enter a phone number manually.

*\*This workflow is continued on the next page.*

3

### Prepare the Added Participant for Call Transfer



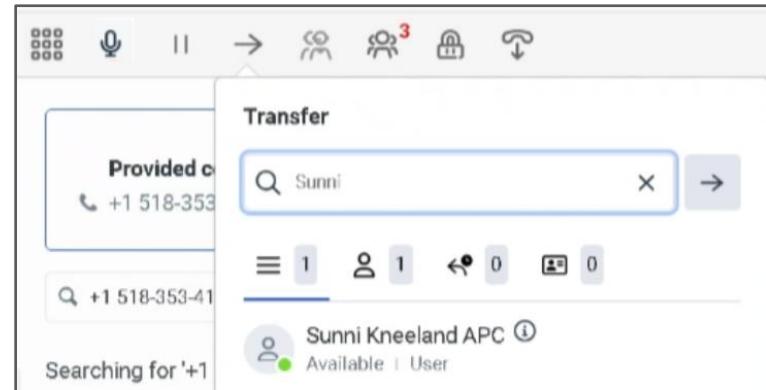
When your call is answered, inform the added participant that they are in a conference call for an interpreter line transfer.

- Introduce the caller and summarize their relationship to the patient and authorization status.
- Ask them to make themselves **Available** in Genesys and wait for them to verbally confirm this status change.
- Once confirmed, remove the added participant from the call by selecting “End Call” by their name.

You can toggle the **Conference** menu on and off to view all call participants.

3

### Complete a Cold Transfer to Hand Off the Call



Your contact will now expect an incoming cold transfer which will include the caller and interpreter.

- After removing your contact from the call, open the “Transfer” option from the dashboard and search for them in the address book.
- They should be listed as “Available”.
- Select their name to complete the cold transfer and end your portion of the call.

Your transfer is now complete.

# Administrative Workflows

## Table of Contents

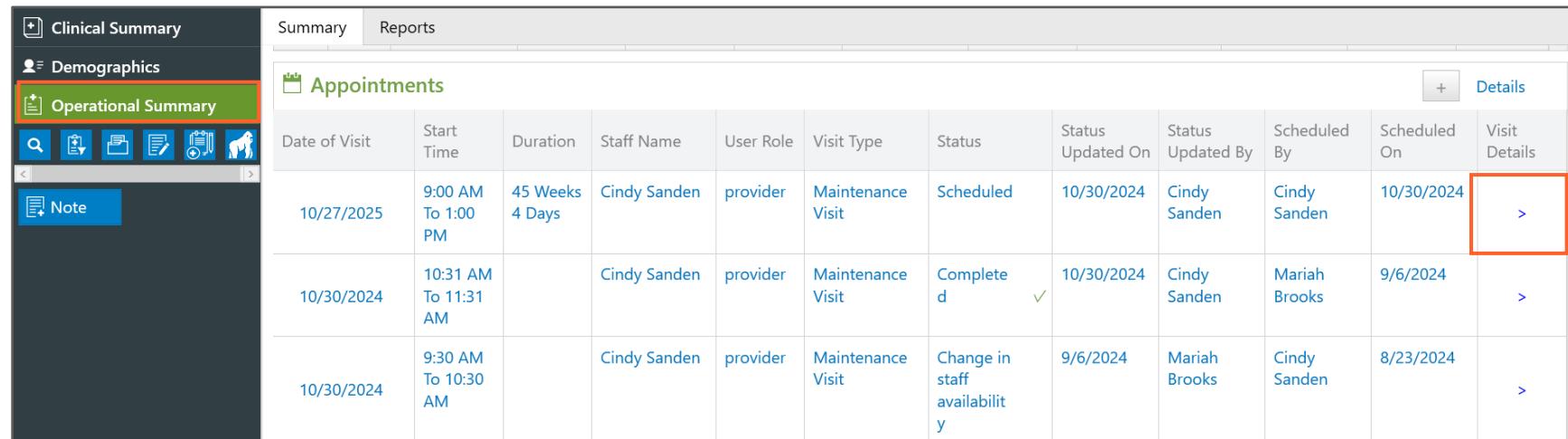
- [Appointment Administration in Ubiquity](#)
- [Appointment Confirmation Guidelines](#)
- [Appointment Rescheduling General Guidelines](#)
- [Appointment Rescheduling by Type](#)
- [Appointment Acuity & Intensity Conditions](#)
- [Enter & Save TCPA Acknowledgements](#)
- [HPSI Tab Market & Coverage Information](#)
- [HouseCalls Appointment & Schedule Requests](#)
- [Appointments within HBMC Safety Zones](#)
- [Address & Contact Updates in Ubiquity](#)
- [Local Community Resources & Services Advisory](#)
- [Prospective Patient Requests for Services or Enrollment](#)
- [Transition Program Patients](#)
- [Answering Service Message & Callback Requests](#)



# Appointment Administration in Ubiquity

When patients or authorized contacts request general appointment information, or to adjust an appointment:

- Take note of the Date of Visit, Start Time, Staff Name, and User Role to prepare for general questions related to the visit.
- To cancel or reschedule an appointment, select the arrow under **Visit Details**.



Date of Visit	Start Time	Duration	Staff Name	User Role	Visit Type	Status	Status Updated On	Status Updated By	Scheduled By	Scheduled On	Visit Details
10/27/2025	9:00 AM To 1:00 PM	45 Weeks 4 Days	Cindy Sanden	provider	Maintenance Visit	Scheduled	10/30/2024	Cindy Sanden	Cindy Sanden	10/30/2024	>
10/30/2024	10:31 AM To 11:31 AM		Cindy Sanden	provider	Maintenance Visit	Completed ✓	10/30/2024	Cindy Sanden	Mariah Brooks	9/6/2024	>
10/30/2024	9:30 AM To 10:30 AM		Cindy Sanden	provider	Maintenance Visit	Change in staff availability	9/6/2024	Mariah Brooks	Cindy Sanden	8/23/2024	>

## Start Times

When first scheduled, start times may span a 2-5 hour window to account for travel time, traffic, and any other appointments the visiting clinician might have that day.

- This window will be narrowed to 1-2 hours a few days before the appointment's scheduled date.

## Cancelled Appointment Statuses

Occasionally, an appointment's Status may be listed as **Change in Staff Availability** or **Moved Patient to Optimize Schedule**. These appointments are considered cancelled.

## Visit Details

1. Visit Type (determine whether appointment adjustments are within the LM1 PCC scope)
2. Staff Type (may be listed as provider or palliative care medical director (PCMD) for Palliative Management visits)
3. Visit Address (if blank, this indicates a telemedicine visit)
4. Check to indicate a patient or Landmark appointment cancellation.
5. Check to confirm the appointment
6. Use the "Note" section to indicate why the appointment is being cancelled.
7. Cancel changes made to the appointment, reschedule the appointment, or cancel the appointment.

The screenshot shows the 'Visit Details' window with the following fields and their values:

- Patient Name: [empty]
- Staff Type: provider
- Travel Time: 26 Mins
- Geographical Note: -
- Visit Type: Maintenance Visit (marked with a red box labeled 1)
- Staff Name: [empty]
- Duration: 60 Mins
- Visit Address: [empty] (marked with a red box labeled 3)
- Visit Note: [empty]
- Patient Cancelled:  (marked with a red box labeled 4)
- Landmark Cancelled:
- Status:
  - Scheduled
  - Confirmed:  (marked with a red box labeled 5)
- Note: [empty] (marked with a red box labeled 6)
- Buttons at the bottom: Cancel, Reschedule Visit, Cancel Visit (the 'Cancel' button is highlighted with a red box labeled 7)

### Appointment Documentation

Your Ubiquity note should indicate the appointment type, rescheduled date, or cancellation reason if an appointment is adjusted.

Reference the Call Documentation section for details, and templates.

## Cancellation

1

Select “Patient” or “Landmark” Cancelled in Visit Details.

The Visit Details window displays appointment details. In the bottom left corner, there are two checkboxes: "Patient Cancelled" and "Landmark Cancelled". The "Patient Cancelled" checkbox is checked and highlighted with a red box. Below the checkboxes is a note section with a text area and a "Note" button. At the bottom are three buttons: "Cancel", "Reschedule Visit", and "Cancel Visit".

- Indicate whether the patient or Landmark requested to cancel the appointment.
- Enter a brief note to indicate a reason for cancellation.

2

Select “Cancel Visit”

The Visit Details window displays appointment details. The "Patient Cancelled" checkbox is checked. Below the checkboxes is a note section with a text area and a "Note" button. At the bottom are three buttons: "Cancel", "Reschedule Visit", and "Cancel Visit". The "Cancel Visit" button is highlighted with a red box.

- Click the “Cancel Visit” button
- Inform the caller that the visit was cancelled.
- Note the visit cancellation in your Ubiquity Note.

## Reschedule

1

Select “Patient” or “Landmark” Cancelled in Visit Details.

The Visit Details window displays appointment details. At the bottom, there are two checkboxes: "Patient Cancelled" and "Landmark Cancelled". Both checkboxes are currently unchecked. A red box highlights this area.

Patient Name: [redacted] Visit Type: Maintenance Visit

Staff Type: provider Staff Name: [redacted] Date and Time: [redacted]

Travel Time: 26 Mins Duration: 60 Mins Visit Address: [redacted]

Geographical Note: [redacted] Visit Note

Patient Cancelled  Landmark Cancelled

\* Status: Scheduled  
Confirmed:  Confirmation details: [redacted]

Note: [redacted]

Cancel Reschedule Visit Cancel Visit

- Indicate whether the patient or Landmark requested to reschedule the appointment.
- Enter a brief note to indicate a reason for the reschedule.

2

Select “Reschedule Visit”

The Visit Details window displays appointment details. The "Patient Cancelled" checkbox is now checked, while the "Landmark Cancelled" checkbox remains unchecked. A red box highlights this area.

Patient Name: [redacted] Visit Type: Maintenance Visit

Staff Type: provider Staff Name: [redacted] Date and Time: [redacted]

Travel Time: 26 Mins Duration: 60 Mins Visit Address: [redacted]

Geographical Note: [redacted] Visit Note

Patient Cancelled  Landmark Cancelled

\* Status: Scheduled  
Confirmed:  Confirmation details: [redacted]

Note: [redacted]

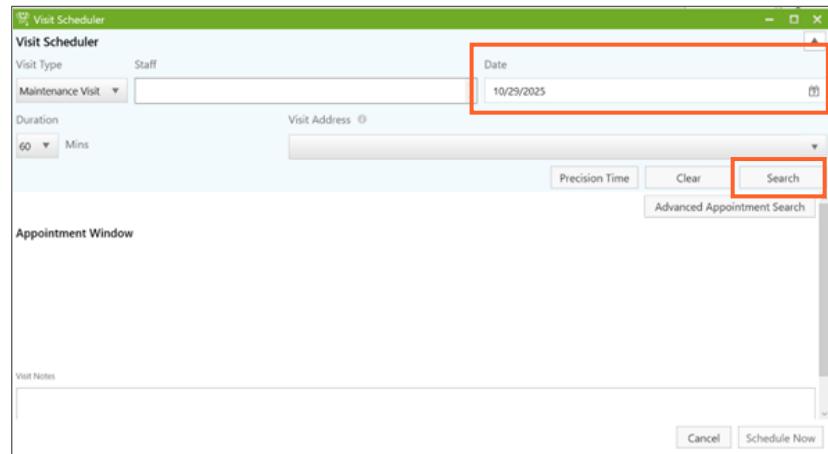
Cancel  Cancel Visit

- Click the “Cancel Visit” button
- Inform the caller that the visit was cancelled.
- Note the visit cancellation in your Ubiquity Note.

*\*This workflow is continued on the next page.*

3

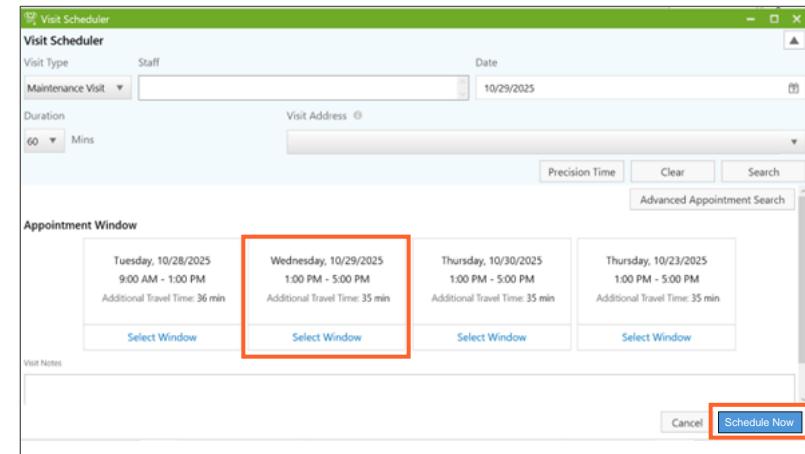
### Search for Available Appointments



- Click the calendar under “Date” to target appointment date. Click “Search” to view any open start windows.
- If no appointments are available. Select a new date and search again.

4

### Select the Appointment Start Window and Reschedule



- Offer the available start windows to the caller.
- Select the desired window.
- Click “Schedule Now” to complete the workflow.

# Appointment Confirmation Guidelines

Landmark First may confirm all appointments within **ONE WEEK** of the appointment.

## Appointment Access

A record of past and upcoming appointments can be viewed in the ***Operational Summary*** section of the patient's chart:

- Select the arrow under "Visit Details" to access confirmation, cancellation, and reschedule options for the appointment.

The screenshot shows the 'Operational Summary' section of a patient chart. On the left, there is a sidebar with icons for Clinical Summary, Demographics, Operational Summary (which is selected and highlighted in green), and Note. The main area is titled 'Appointments'. It displays a table with columns: Date of Visit, Start Time, Duration, Staff Name, User Role, Visit Type, Status, Status Updated On, Status Updated By, Scheduled By, Scheduled On, and Visit Details. A row for an appointment on 12/12/2024 is shown. The 'Visit Details' button at the bottom right of the table is highlighted with a red box.

Date of Visit	Start Time	Duration	Staff Name	User Role	Visit Type	Status	Status Updated On	Status Updated By	Scheduled By	Scheduled On	Visit Details
12/12/2024	9:58 AM To 10:58 AM	1 Day	Kathy White	provider	Maintenance Visit	Scheduled	12/9/2024	Jennifer Dupye	Kathy Y White	11/5/2024	>

The screenshot shows the 'Visit Details' window. It includes fields for Patient Name (Kathy White, NP), Staff Type (provider), Travel Time (58 Mins), Geographical Note (Address updated by member), Visit Type (Maintenance Visit), Staff Name (Kathy White, NP), Duration (60 Mins), Visit Note (-), and Date and Time (12/9/2024 02:34 PM EST). At the bottom, there are checkboxes for Patient Cancelled, Landmark Cancelled, and Status (with 'Confirmed' checked). The 'Confirmed' checkbox is highlighted with a red box. There are also 'Cancel', 'Reschedule Visit', and 'Cancel Visit' buttons at the bottom.

## Confirmation Process

1. Open the Visit Details window for the appointment you need to confirm.
2. Check the "Confirm" option under the "Status" section.
3. Your selection will be saved automatically. Close the window when complete.

LM1 PCCs may need to complete pre-confirmation screenings if a specific metro experiences outbreaks of respiratory illness or other contagions that may jeopardize the safety of our visiting clinicians.

- Metro-specific screenings will be announced in Microsoft Teams channels.

## Appointment Confirmation Calls

Patients or caregivers may call to indicate they received a missed call from us. Recent notes in Ubiquity should show that an appointment confirmation call was attempted. Request additional details from the caller as necessary.

## Appointment Rescheduling General Guidelines

LM1 PCCs will cancel / reschedule appointments **ONLY** if:

- The appointment type is within the LM1 PCC scope.
- There is no immediate clinical / medical concern.
- The available appointment coincides with the patient's Acuity and Intensity.

The appointment type, visiting provider / staff, and duration should **NEVER** be changed.

### Available Appointment Start Windows

Appointments within the LM1 PCC scope may be rescheduled **as soon as next day or next business day so long as the patient is available** for the visit. Visiting clinicians in the markets are instructed to check their calendars at the start of each workday to track these changes and conduct follow-up as needed.

- LM1 PCCs should collaborate with patients or caregivers to determine the best visit day and time.
- Scheduled times should adhere to **Safety Zone** windows, if applicable.
- The selected appointment start window should **NEVER** be determined by a Precision Time search. LM1 PCCs.

If a date and time cannot be scheduled during the phone call, LM1 PCCs will forward reschedule requests to the **Care Team** members and **Market** by email.

The screenshot shows a search interface for appointment windows. At the top right are buttons for 'Precision Time', 'Clear', and 'Search'. Below that is a button for 'Advanced Appointment Search'. The main area is titled 'Appointment Window' and lists four days:

Tuesday, 10/28/2025	Wednesday, 10/29/2025	Thursday, 10/30/2025	Friday, 10/27/2025
9:00 AM - 1:00 PM Additional Travel Time: 36 min	1:00 PM - 5:00 PM Additional Travel Time: 35 min	1:00 PM - 5:00 PM Additional Travel Time: 35 min	1:00 PM - 5:00 PM Additional Travel Time: 35 min
<a href="#">Select Window</a>	<a href="#">Select Window</a>	<a href="#">Select Window</a>	<a href="#">Precision Time</a>

A red box highlights the first three rows (Tuesday, Wednesday, Thursday). A large red 'X' is drawn over the entire fourth row (Friday), indicating it is unavailable or has been removed.

## Appointment Rescheduling by Type

Select an appointment to view cancellation , reschedule, and adjustment workflows:

Appointment:	Description:	Adjusted By:
<u>Initial Visit (IV)</u>	Introduction to the program and sign paperwork.	LM1 PCCs
<u>Initial Visit 2 (IV2)</u>	Initial Visit follow-up to review medical history / records.	LM1 PCCs
<u>Initial Visit – BH</u>	Introduction to the Landmark Behavioral Health program.	Visiting Clinician
<u>Maintenance Visit (MV)</u>	Routine visit based on patient's Acuity & Intensity.	LM1 PCCs
<u>Maintenance Visit – BH</u>	Routine visit based on patient's BH needs, Acuity & Intensity.	Visiting Clinician
<u>Urgent Visit - UV</u>	Same day / next day visit for acute or urgent medical issues.	LM1 Clinicians
<u>Urgent Visit – BH</u>	Same day / next day visit for acute behavioral health issues.	Visiting Clinician
<u>IDT Visit</u>	Visits with non-Providers (e.g. Social Workers, CHAs, etc.).	Visiting Clinician
<u>Telephonic Visit</u>	Standard encounter notes or unit values are not guaranteed.	Visiting Clinician
<u>Post-Discharge Visit (PDV)</u>	Provider visit within 3 days of medical facility discharge.	LM1 PCCs
<u>Palliative Prognosis Visit</u>	First visit and introduction to the Palliative Pathway program.	LM1 PCCs
<u>Palliative Co-Visits</u>	Combined Provider and Social Worker visit (75m visit length).	Market CCs
<u>Palliative Management Visit</u>	Maintenance visits for patients in the Palliative Pathway.	LM1 PCCs or PCMD
<u>Telemedicine Visits</u>	A remote condition assigned to other appointment types.	Visit Dependant

## Initial Visit (IV)

<b>Adjustment:</b>	<b>Business Hours: (8:30 AM – 5:30 PM Local Time)</b>	<b>After Hours (Or Unsuccessful Warm Transfer)</b>
<i>Cancellation</i>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs. <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first.</li> </ul> </li> </ul>
<i>Reschedule</i>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first</li> </ul> </li> </ul>
<i>Same / Next Day Request for Information</i>	<ul style="list-style-type: none"> <li>● Check Visit Details in Ubiquity: <ul style="list-style-type: none"> <li>○ Provide authorized caller with information requested.</li> <li>○ Consult the visiting provider or staff member for updates as needed.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Send the visiting provider / staff a notification in Teams.</li> <li>● Send an email notification to the Care Team and Market</li> </ul>
<i>Same / Next Day Request to Cancel or Reschedule</i>	<ul style="list-style-type: none"> <li>● Consult the visiting provider or staff member to inform them of the adjustment.</li> </ul>	<ul style="list-style-type: none"> <li>● Send the visiting provider / staff a notification in Teams.</li> <li>● Send an email notification to the Care Team and Market</li> </ul>

## Initial Visit 2 (IV2)

Adjustment:	Business Hours: (8:30 AM – 5:30 PM Local Time)	After Hours (Or Unsuccessful Warm Transfer)
<i>Cancellation</i>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs. <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first.</li> </ul> </li> </ul>
<i>Reschedule</i>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first</li> </ul> </li> </ul>
<i>Same / Next Day Request for Information</i>	<ul style="list-style-type: none"> <li>● Check Visit Details in Ubiquity: <ul style="list-style-type: none"> <li>○ Provide authorized caller with information requested.</li> <li>○ Consult the visiting provider or staff member for updates as needed.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Send the visiting provider / staff a notification in Teams.</li> <li>● Send an email notification to the Care Team and Market</li> </ul>
<i>Same / Next Day Request to Cancel or Reschedule</i>	<ul style="list-style-type: none"> <li>● Consult the visiting provider or staff member to inform them of the adjustment.</li> </ul>	<ul style="list-style-type: none"> <li>● Send the visiting provider / staff a notification in Teams.</li> <li>● Send an email notification to the Care Team and Market</li> </ul>

## Initial Visit – BH

Please reference the “Staff Name” and “User Role”. The specified staff member will take point on adjusting these appointments.

Appointments											<a href="#">+</a>	Details
Date of Visit	Start Time	Duration	Staff Name	User Role	Visit Type	Status	Status Updated On	Status Updated By	Scheduled By	Scheduled On	Visit Details	
11/12/2024	1:55 PM To 3:10 PM		Tracy Groller	provider_bh	Initial Visit - BH	Completed ✓	11/12/2024	Tracy Groller	Tracy Groller	10/31/2024	>	

Adjustment:	Business Hours: (8:30 AM – 5:30 PM Local Time)	After Hours (Or Unsuccessful Warm Transfer)
All Cancellation	<ul style="list-style-type: none"> <li>Consult the visiting “Staff Name” listed in Ubiquity for warm transfer.</li> </ul>	<ul style="list-style-type: none"> <li>Send the visiting provider / staff a notification in Teams.             <ul style="list-style-type: none"> <li>Send an email notification to the Care Team and Market</li> </ul> </li> </ul>
All Reschedule	<ul style="list-style-type: none"> <li>Consult the visiting “Staff Name” listed in Ubiquity for warm transfer.</li> </ul>	<ul style="list-style-type: none"> <li>Send the visiting provider / staff a notification in Teams.             <ul style="list-style-type: none"> <li>Send an email notification to the Care Team and Market</li> </ul> </li> </ul>

## Maintenance Visit (MV)

<b>Adjustment:</b>	<b>Business Hours: (8:30 AM – 5:30 PM Local Time)</b>	<b>After Hours (Or Unsuccessful Warm Transfer)</b>
<i>Cancellation</i>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs. <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first.</li> </ul> </li> </ul>
<i>Reschedule</i>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first</li> </ul> </li> </ul>
<i>Same / Next Day Request for Information</i>	<ul style="list-style-type: none"> <li>● Check Visit Details in Ubiquity: <ul style="list-style-type: none"> <li>○ Provide authorized caller with information requested.</li> <li>○ Consult the visiting provider or staff member for updates as needed.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Send the visiting provider / staff a notification in Teams.</li> <li>● Send an email notification to the Care Team and Market</li> </ul>
<i>Same / Next Day Request to Cancel or Reschedule</i>	<ul style="list-style-type: none"> <li>● Consult the visiting provider or staff member to inform them of the adjustment.</li> </ul>	<ul style="list-style-type: none"> <li>● Send the visiting provider / staff a notification in Teams.</li> <li>● Send an email notification to the Care Team and Market</li> </ul>

## Maintenance Visit – BH

Please reference the “Staff Name” and “User Role”. The specified staff member will take point on adjusting these appointments.

Appointments											<a href="#">+</a>	Details
Date of Visit	Start Time	Duration	Staff Name	User Role	Visit Type	Status	Status Updated On	Status Updated By	Scheduled By	Scheduled On	Visit Details	
1/13/2025	10:05 AM To 10:50 AM	4 Weeks 4 Days	Tracy Groller	provider bh	Maintenance Visit - BH	Scheduled	12/9/2024	Tracy Groller	Tracy Groller	12/9/2024	>	

Adjustment:	Business Hours: (8:30 AM – 5:30 PM Local Time)	After Hours (Or Unsuccessful Warm Transfer)
All Cancellation	<ul style="list-style-type: none"> <li>Consult the visiting “Staff Name” listed in Ubiquity for warm transfer.</li> </ul>	<ul style="list-style-type: none"> <li>Send the visiting provider / staff a notification in Teams.             <ul style="list-style-type: none"> <li>Send an email notification to the Care Team and Market</li> </ul> </li> </ul>
All Reschedule	<ul style="list-style-type: none"> <li>Consult the visiting “Staff Name” listed in Ubiquity for warm transfer.</li> </ul>	<ul style="list-style-type: none"> <li>Send the visiting provider / staff a notification in Teams.             <ul style="list-style-type: none"> <li>Send an email notification to the Care Team and Market</li> </ul> </li> </ul>

## Urgent Visit - UV

Urgent Visits are managed by LM1 Dispatch: [lm1uehandoff@optum.com](mailto:lm1uehandoff@optum.com).

Adjustment:	Business Hours: (8:30 AM – 5:30 PM Local Time)	After Hours (Or Unsuccessful Warm Transfer)
Cancellation	<ul style="list-style-type: none"><li>● Notify Supervisor.</li><li>● Email LM1 Dispatch.</li><li>● Notify the Visiting Clinician in Teams.</li></ul>	<ul style="list-style-type: none"><li>● Notify Supervisor.</li><li>● Email LM1 Dispatch.</li><li>● Notify the Visiting Clinician in Teams.</li></ul>
Reschedule	<ul style="list-style-type: none"><li>● Notify Supervisor.</li><li>● Email LM1 Dispatch.</li><li>● Notify the Visiting Clinician in Teams.</li></ul>	<ul style="list-style-type: none"><li>● Notify Supervisor.</li><li>● Email LM1 Dispatch.</li><li>● Notify the Visiting Clinician in Teams.</li></ul>
Same / Next Day Request for Information	<ul style="list-style-type: none"><li>● Check Visit Details in Ubiquity:<ul style="list-style-type: none"><li>○ Provide authorized caller with information requested.</li><li>○ Consult the visiting provider or staff member for updates as needed.</li></ul></li></ul>	<ul style="list-style-type: none"><li>● Notify Supervisor.</li><li>● Email LM1 Dispatch.</li><li>● Send the visiting provider / staff a notification in Teams.</li><li>● Send an email notification to the Care Team and Market.</li></ul>
Same / Next Day Request to Cancel or Reschedule	<ul style="list-style-type: none"><li>● Consult the visiting provider or staff member to inform them of the adjustment.</li></ul>	<ul style="list-style-type: none"><li>● Notify Supervisor.</li><li>● Email LM1 Dispatch.</li><li>● Send the visiting provider / staff a notification in Teams.</li><li>● Send an email notification to the Care Team and Market.</li></ul>

## Urgent Visit – BH

Please reference the “Staff Name” and “User Role”. The specified staff member will take point on adjusting these appointments.

Appointments											<a href="#">+</a>	Details
Date of Visit	Start Time	Duration	Staff Name	User Role	Visit Type	Status	Status Updated On	Status Updated By	Scheduled By	Scheduled On	Visit Details	
6/13/2024	12:45 PM To 1:00 PM		Regina Radogna	provider	Urgent Visit - BH	Completed ✓	6/13/2024	Regina Radogna	Chelsea Crist	6/13/2024	>	

Adjustment:	Business Hours: (8:30 AM – 5:30 PM Local Time)	After Hours (Or Unsuccessful Warm Transfer)
All Cancellation	<ul style="list-style-type: none"> <li>Consult the visiting “Staff Name” listed in Ubiquity for warm transfer.</li> </ul>	<ul style="list-style-type: none"> <li>Send the visiting provider / staff a notification in Teams.             <ul style="list-style-type: none"> <li>Send an email notification to the Care Team and Market</li> </ul> </li> </ul>
All Reschedule	<ul style="list-style-type: none"> <li>Consult the visiting “Staff Name” listed in Ubiquity for warm transfer.</li> </ul>	<ul style="list-style-type: none"> <li>Send the visiting provider / staff a notification in Teams.             <ul style="list-style-type: none"> <li>Send an email notification to the Care Team and Market</li> </ul> </li> </ul>

## IDT Visit

Please reference the “Staff Name” and “User Role”. The specified staff member will take point on adjusting these appointments.

Appointments											<a href="#">+</a>	Details
Date of Visit	Start Time	Duration	Staff Name	User Role	Visit Type	Status	Status Updated On	Status Updated By	Scheduled By	Scheduled On	Visit Details	
11/11/2024	1:25 PM To 2:25 PM		Antoinette Mcmillan	social worker	IDT Visit	Completed ✓	11/11/2024	Antoinette Mcmillan	Antoinette Mcmillan	11/7/2024	>	

Adjustment:	Business Hours: (8:30 AM – 5:30 PM Local Time)	After Hours (Or Unsuccessful Warm Transfer)
All Cancellation	<ul style="list-style-type: none"> <li>Consult the visiting “Staff Name” listed in Ubiquity for warm transfer.</li> </ul>	<ul style="list-style-type: none"> <li>Send the visiting provider / staff a notification in Teams.             <ul style="list-style-type: none"> <li>Send an email notification to the Care Team and Market</li> </ul> </li> </ul>
All Reschedule	<ul style="list-style-type: none"> <li>Consult the visiting “Staff Name” listed in Ubiquity for warm transfer.</li> </ul>	<ul style="list-style-type: none"> <li>Send the visiting provider / staff a notification in Teams.             <ul style="list-style-type: none"> <li>Send an email notification to the Care Team and Market</li> </ul> </li> </ul>

## Telephonic Visit

Please reference the “Staff Name” and “User Role”. The specified staff member will take point on adjusting these appointments.

Appointments											<a href="#">+</a>	Details
Date of Visit	Start Time	Duration	Staff Name	User Role	Visit Type	Status	Status Updated On	Status Updated By	Scheduled By	Scheduled On	Visit Details	
12/18/2024	9:50 AM To 10:00 AM	6 Days	Jacki King	social worker	Telephonic	Scheduled	12/11/2024	Jacki King	Jacki King	12/11/2024	>	

Adjustment:	Business Hours: (8:30 AM – 5:30 PM Local Time)	After Hours (Or Unsuccessful Warm Transfer)
All Cancellation	<ul style="list-style-type: none"> <li>Consult the visiting “Staff Name” listed in Ubiquity for warm transfer.</li> </ul>	<ul style="list-style-type: none"> <li>Send the visiting provider / staff a notification in Teams.             <ul style="list-style-type: none"> <li>Send an email notification to the Care Team and Market</li> </ul> </li> </ul>
All Reschedule	<ul style="list-style-type: none"> <li>Consult the visiting “Staff Name” listed in Ubiquity for warm transfer.</li> </ul>	<ul style="list-style-type: none"> <li>Send the visiting provider / staff a notification in Teams.             <ul style="list-style-type: none"> <li>Send an email notification to the Care Team and Market</li> </ul> </li> </ul>

## Post Discharge Visit (PDV)

<b>Adjustment:</b>	<b>Business Hours: (8:30 AM – 5:30 PM Local Time)</b>	<b>After Hours (Or Unsuccessful Warm Transfer)</b>
<i>Cancellation</i>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs. <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first.</li> </ul> </li> </ul>
<i>Reschedule</i>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first</li> </ul> </li> </ul>
<i>Same / Next Day Request for Information</i>	<ul style="list-style-type: none"> <li>● Check Visit Details in Ubiquity: <ul style="list-style-type: none"> <li>○ Provide authorized caller with information requested.</li> <li>○ Consult the visiting provider or staff member for updates as needed.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Send the visiting provider / staff a notification in Teams.</li> <li>● Send an email notification to the Care Team and Market</li> </ul>
<i>Same / Next Day Request to Cancel or Reschedule</i>	<ul style="list-style-type: none"> <li>● Consult the visiting provider or staff member to inform them of the adjustment.</li> </ul>	<ul style="list-style-type: none"> <li>● Send the visiting provider / staff a notification in Teams.</li> <li>● Send an email notification to the Care Team and Market</li> </ul>

## Palliative Prognosis Visit

<b>Adjustment:</b>	<b>Business Hours: (8:30 AM – 5:30 PM Local Time)</b>	<b>After Hours (Or Unsuccessful Warm Transfer)</b>
<i>Cancellation</i>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs. <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first.</li> </ul> </li> </ul>
<i>Reschedule</i>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first</li> </ul> </li> </ul>
<i>Same / Next Day Request for Information</i>	<ul style="list-style-type: none"> <li>● Check Visit Details in Ubiquity: <ul style="list-style-type: none"> <li>○ Provide authorized caller with information requested.</li> <li>○ Consult the visiting provider or staff member for updates as needed.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Send the visiting provider / staff a notification in Teams.</li> <li>● Send an email notification to the Care Team and Market</li> </ul>
<i>Same / Next Day Request to Cancel or Reschedule</i>	<ul style="list-style-type: none"> <li>● Consult the visiting provider or staff member to inform them of the adjustment.</li> </ul>	<ul style="list-style-type: none"> <li>● Send the visiting provider / staff a notification in Teams.</li> <li>● Send an email notification to the Care Team and Market</li> </ul>

## Palliative Co-Visit

Please reference the “Staff Name” and “User Role”. The specified staff member will take point on adjusting these appointments.

Appointments											<a href="#">+</a>	Details
Date of Visit	Start Time	Duration	Staff Name	User Role	Visit Type	Status	Status Updated On	Status Updated By	Scheduled By	Scheduled On	Visit Details	
10/21/2024	2:40 PM To 3:55 PM		Christine Jago	social worker	Palliative Co-Visit	Scheduling error	10/10/2024	Regina Radogna	Regina Radogna	10/8/2024	>	

<b>Adjustment:</b>		<b>Business Hours:</b> <i>(8:30 AM – 5:30 PM Local Time)</i>	<b>After Hours</b> <i>(Or Unsuccessful Warm Transfer)</i>
All Cancellation		<ul style="list-style-type: none"> <li>Consult the visiting “Staff Name” listed in Ubiquity for warm transfer.</li> </ul>	<ul style="list-style-type: none"> <li>Send the visiting provider / staff a notification in Teams.             <ul style="list-style-type: none"> <li>Send an email notification to the Care Team and Market</li> </ul> </li> </ul>
All Reschedule		<ul style="list-style-type: none"> <li>Consult the visiting “Staff Name” listed in Ubiquity for warm transfer.</li> </ul>	<ul style="list-style-type: none"> <li>Send the visiting provider / staff a notification in Teams.             <ul style="list-style-type: none"> <li>Send an email notification to the Care Team and Market</li> </ul> </li> </ul>

## Palliative Management Visit

The ownership of a Palliative Management Visit may change depending on who scheduled the appointment.

- The “User Role” column or “Staff Type” listed in the Visit Details window will show “Provider” or “Palliative Care Medical Director (PCMD).”

Appointments											+ Details
Date of Visit	Start Time	Duration	Staff Name	User Role	Visit Type	Status	Status Updated On	Status Updated By	Scheduled By	Scheduled On	Visit Details
1/23/2025	9:00 AM To 1:00 PM	6 Weeks 1 Day	Trish Moore	provider	Palliative Management	Scheduled	12/6/2024	Kristian Carlin	Kristian Carlin	12/6/2024	>

## Palliative Care Medical Director (PCMD) Visit

Adjustment:	Business Hours: (8:30 AM – 5:30 PM Local Time)	After Hours (Or Unsuccessful Warm Transfer)
All Cancellation	<ul style="list-style-type: none"><li>• Consult the visiting “Staff Name” listed in Ubiquity for warm transfer.</li></ul>	<ul style="list-style-type: none"><li>• Send the visiting provider / staff a notification in Teams.<ul style="list-style-type: none"><li>○ Send an email notification to the Care Team and Market</li></ul></li></ul>
All Reschedule	<ul style="list-style-type: none"><li>• Consult the visiting “Staff Name” listed in Ubiquity for warm transfer.</li></ul>	<ul style="list-style-type: none"><li>• Send the visiting provider / staff a notification in Teams.<ul style="list-style-type: none"><li>○ Send an email notification to the Care Team and Market</li></ul></li></ul>

## Provider Visit

<b>Adjustment:</b>	<b>Business Hours: (8:30 AM – 5:30 PM Local Time)</b>	<b>After Hours (Or Unsuccessful Warm Transfer)</b>
<i>Cancellation</i>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs. <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first.</li> </ul> </li> </ul>
<i>Reschedule</i>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Completed by LM1 PCCs <ul style="list-style-type: none"> <li>○ LM1 Clinicians and Triage RNs will adjust the visit if they receive the call first</li> </ul> </li> </ul>
<i>Same / Next Day Request for Information</i>	<ul style="list-style-type: none"> <li>● Check Visit Details in Ubiquity: <ul style="list-style-type: none"> <li>○ Provide authorized caller with information requested.</li> <li>○ Consult the visiting provider or staff member for updates as needed.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● Send the visiting provider / staff a notification in Teams.</li> <li>● Send an email notification to the Care Team and Market</li> </ul>
<i>Same / Next Day Request to Cancel or Reschedule</i>	<ul style="list-style-type: none"> <li>● Consult the visiting provider or staff member to inform them of the adjustment.</li> </ul>	<ul style="list-style-type: none"> <li>● Send the visiting provider / staff a notification in Teams.</li> <li>● Send an email notification to the Care Team and Market</li> </ul>

## Telemedicine Visit

Telemedicine visits are remote variations of other visit types.

- The “Telemedicine” visit variation does not change appointment ownership or adjustment workflows.
  - LM1 PCCs will cancel and reschedule Telemedicine visits that fall within their scope.

Telemedicine visits show no visit address in the **Visit Details** window:

The screenshot shows the 'Visit Details' window with the following fields populated:

Patient Name		Visit Type	Date and Time		
		Maintenance Visit	6/13/2024 01:05 PM To 01:30 PM		
Staff Type provider	Staff Name	Visit Address	Renan Consuegra, NP		-
Travel Time	Duration	5 Mins 25 Mins			
Geographical Note	Visit Note				
<input type="checkbox"/> Patient Cancelled <input type="checkbox"/> Landmark Cancelled					
* Status					
Scheduled					
<input type="checkbox"/> Confirmed	Confirmation details				
Note	<input type="text"/>				

At the bottom, there are three buttons: 'Cancel', 'Reschedule Visit', and 'Cancel Visit'.

## Appointment Acuity & Intensity Conditions

Every patient chart includes Acuity and Intensity values:



### Acuity

Acuity indicates the recommended frequency of visits that a patient receives:

- Acuity A and B patients are more clinically complex than Acuity C & D patients.
  - When rescheduling patients, look for available windows within the recommended Acuity-based timeframes.
  - This may require escalation to a market CC if Ubiquity offers no available windows for appointment rescheduling.

	A	B	C	D
Patient Condition	Declining	At Risk of Decline	Stable with Support	Stable
Visit Frequency	Once a Month or Less	Every 2-3 Months	Every 3-4 Months	Once a Year
Rescheduling Variance	One Week Before or After	Two Weeks Before or After	Three Weeks Before or After	Four Weeks Before or After

## Rescheduling Appointments Based on Acuity

### Example – Acuity A Date Range

March - 2025						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
9	23	24	25	26	27	28
10	2	3	4	5	6	7
11	9	10	11	12	13	14
12	16	17	18	19	20	21
13	23	24	25	26	27	28
14	30	31	1	2	3	4
						5

If an Acuity A patient calls Landmark on March 2<sup>nd</sup> to reschedule an appointment originally scheduled on the 12<sup>th</sup>:

- LM1 PCCs may reschedule the appointment as far as one week after the original scheduled date, or sooner.

### Start Window Considerations

The further out an appointment is scheduled, the larger the start window is likely to be. This is to account for travel time and other appointments that may be added to the visiting clinician's calendar.

If the caller expresses concern for a large start time window, explain that the window will be narrowed to a 1-2 hour time slot closer to the appointment date.

### Example – Acuity B Date Range

March - 2025						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
9	23	24	25	26	27	28
10	2	3	4	5	6	7
11	9	10	11	12	13	14
12	16	17	18	19	20	21
13	23	24	25	26	27	28
14	30	31	1	2	3	4
						5

June - 2025						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
23	1	2	3	4	5	6
24	8	9	10	11	12	13
25	15	16	17	18	19	20
26	22	23	24	25	26	27
27	29	30	1	2	3	4
28	6	7	8	9	10	11
						12

If an Acuity B patient calls Landmark on March 2<sup>nd</sup> to reschedule an appointment originally scheduled on the 12<sup>th</sup>:

- LM1 PCCs may reschedule the appointment as far as 2-3 months after the original scheduled date,

## Intensity

Intensity indicates a patient's willingness to participate in the Landmark program.

- Any accommodations or adjustments to a patient's intensity are detailed in the "Alerts" section of the chart.

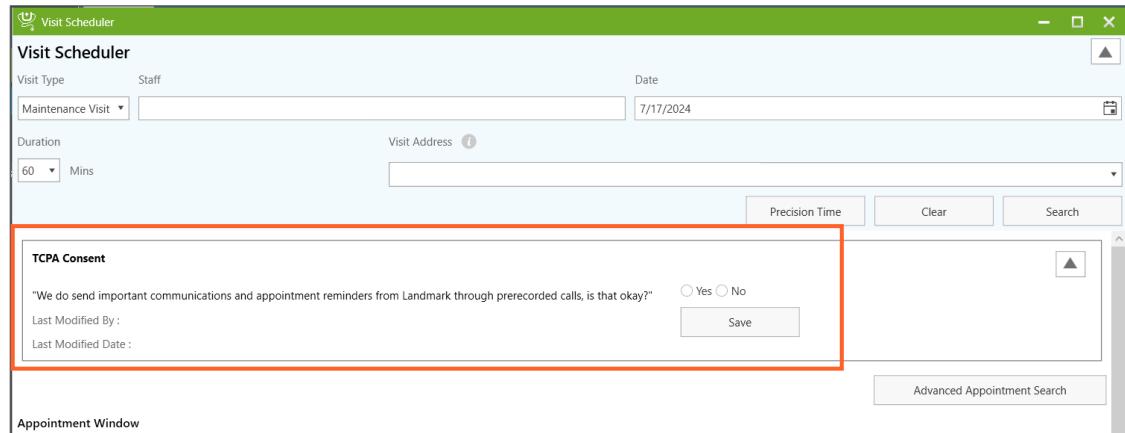
	1	2	3	4	Closed
Intensity Level	Full Service	Partial Service	Minimum Service	Unreachable for Service	No Service
Level of Service	Full Service	To Patient's Specifications	Service Upon Request	No Service	Declined Service
Calls & Visits	Standard Frequency	Modified Frequency	Contact Initiated by Patient Only	Unreachable for Calls	No Contact by Patient Request

Example – Intensity 2



9/6/23 Intensity 2-Pt will call when she needs our services. -KJ, RN, NCM

## Enter & Save TCPA Acknowledgements



The Telephone Consumer Protection Act (TCPA) requires businesses to obtain customer consent before leaving artificial or pre-recorded voice calls on phones:

- With this law, Landmark must obtain a member's consent to receive automated calls such as appointment reminders.
- Collecting TCPA consent is the law and must be correctly obtained.
- You can only collect TCPA consent from a member or their Power of Attorney (POA).
  - DO NOT** collect TCPA consent from a non-member or non-POA contacts listed in the Demographics section of the patient's chart.

### When to Obtain TCPA Consent

If the TCPA agreement appears in the visit scheduler:

- If you do not see the talking point on the scheduler tool, this means that TCPA consent was already collected from this member.
- TCPA collection may be bypassed if the member may be showing blatant agitation or rushing to end the call.

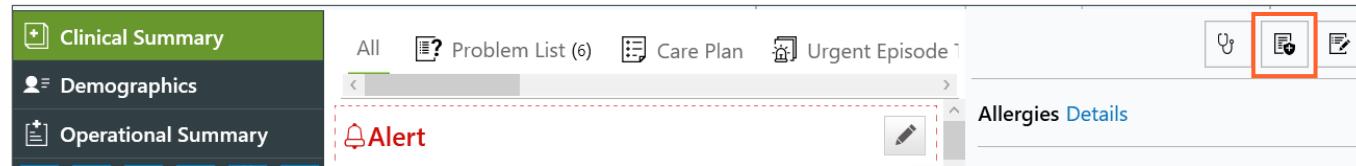
### Script

The following script **MUST** be used, word-for-word. Record and save the patient's response when complete:

*"We do send important communications and appointment reminders from Landmark through prerecorded calls, is that ok?"*

## HPSI Tab Market & Coverage Information

The HPSI tab may be used to view metro, provider coverage, Transition Program information, and other data to supplement workflows. It can be accessed by clicking the **Health Plan Specific Information** button in the **Clinical Summary** of the chart.



Example – Metro Information

Health Plan Specific Information Notes

Home Address Note (60120)

**State:** Illinois  
**Humanity:** Chicago

**UE COVERAGE Chicago**  
**Urgentivist Chicago**

ShiftPlanning

Dec 2024

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

IL - Chicago ▾  
 #1 Daytime Clin..  
 #1 Daytime Clin..  
 #1 Provider

### Metro Identification

As our geographical coverage continues to change, Metros may be listed under alternate names between applications. Please see the heading of the patient's chart, HPSI tab, and Metro's Summary for accurate metro identification.

### UE Coverage

At this time, UE Coverage information does not apply to LM1 PCC workflows.

## Example – Large Metro Specifications

Some markets, like Greater Michigan, are divided into smaller zones. Because of this, the HPSI tab will specify zone coverage.

- Use this information to locate provider coverage in Humanity.

 Health Plan Specific Information Notes □ X

Home Address Note (48650)  
Humanity: Greater Michigan  
  
Provider On Call: #1 Provider Saginaw  
  
UE Coverage: UE RN Saginaw

tcp | Humanity 3       Legacy

ShiftPlanning Day Week Month < Today >

Dec 2024 < >

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

12/13/2024 - 12/13/2024 12/13/2024 - Friday

#1 Provider Saginaw  
5:00pm - 9:00pm MI - Greater Michigan



MI - Greater Mic. ▲  
 #1 Daytime Clin..  
 #1 Provider - Gr..  
 #1 Provider - La..  
 #1 Provider - La..  
 #1 Provider Flin..  
 #1 Provider Kala..  
 #1 Provider Nort..  
 #1 Provider Sagi..



## Example – Large Metro Specifications

Some markets, like Greater Michigan, are divided into smaller zones. Because of this, the HPSI tab will specify zone coverage.

- Use this information to locate provider coverage in Humanity.

 Health Plan Specific Information Notes □ X

Home Address Note (48650)  
Humanity: Greater Michigan  
  
Provider On Call: #1 Provider Saginaw  
  
UE Coverage: UE RN Saginaw

tcp | Humanity 3       Legacy

ShiftPlanning Day Week Month < Today >

Dec 2024 < >

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

12/13/2024 - 12/13/2024 12/13/2024 - Friday

#1 Provider Saginaw  
5:00pm - 9:00pm MI - Greater Michigan



MI - Greater Mic. ▲  
 #1 Daytime Clin..  
 #1 Provider - Gr..  
 #1 Provider - La..  
 #1 Provider - La..  
 #1 Provider Flin..  
 #1 Provider Kala..  
 #1 Provider Nort..  
 #1 Provider Sagi..



## HouseCalls Appointment & Schedule Requests

We may be contacted by HouseCalls to verify when a patient's next visit is scheduled.

- The patient should be present on the phone to provide valid verbal consent.
  - The patient, authorized contact, or legal representative must be conferred into the call if not already present.

1	2	3
<p><b>Complete HIPAA Verification</b></p> <p>Follow patient verification steps as detailed in the <b><i>Compliance Standards</i></b> section of the <b><u>Company Resources &amp; Employee Reference Job Aid</u></b>.</p> <p>Patient HIPAA Verification should follow the <b><u>3 Patient Identifier Verification Procedure</u></b>.</p>	<p><b>Obtain Valid Verbal Consent</b></p> <p>After HIPAA Verifications are complete, obtain Valid Verbal Consent from the patient, caregiver, or legal representative.</p> <p>Follow the steps outlined in the <b><i>Compliance Standards</i></b> section of the <b><u>Company Resources &amp; Employee Reference Job Aid</u></b>.</p> <p>For more information, please reference the <b><u>Valid Verbal Consent Job Aid</u></b>.</p>	<p><b>Provide the Requested Information</b></p> <p>After HIPAA verifications &amp; the Valid Verbal Consent workflows are complete, provide the requested information.</p> <p>If the caller requests to speak to a clinician at any time, follow the <b><u>HouseCalls Request for Clinician</u></b> workflow.</p>

## Appointments within HBMC Safety Zones

The Safety Zone program allows staff to submit ZIP codes for review by the Optum Safety Center of Excellence team. This team will review safety-related reports and statistics for that location and determine safe travel and appointment windows.

### 8:00 AM – 12:00 PM Safety Zone Alert



#### Safety Alerts:

Weapons and/or Violence

Environmental

Safety Zone restriction of 8am-12pm. Date of 07/15/2024 Bulk Upload by IT.



Wednesday, 9/25/2024 9:00 AM - 1:00 PM Additional Travel Time: 8 min
Select Window

Wednesday, 9/25/2024 1:00 PM - 5:00 PM Additional Travel Time: 8 min
Select Window

Monday, 9/23/2024 1:00 PM - 5:00 PM Additional Travel Time: 9 min
Select Window

Tuesday, 9/24/2024 1:00 PM - 5:00 PM Additional Travel Time: 16 min
Select Window

### 8:00 AM – 4:00 PM Safety Zone Alert



#### Safety Alerts:

Environmental

Safety Zone restriction of 8am-4pm. Date of 07/15/2024 Bulk Upload by IT.



Monday, 12/2/2024 9:00 AM - 1:00 PM Additional Travel Time: 13 min
Select Window

Wednesday, 11/27/2024 9:00 AM - 1:00 PM Additional Travel Time: 21 min
Select Window

Monday, 12/2/2024 1:00 PM - 5:00 PM Additional Travel Time: 12 min
Select Window

Tuesday, 11/26/2024 1:00 PM - 5:00 PM Additional Travel Time: 16 min
Select Window

### Safety Zone Appointment Scheduling

If a safety zone review results in a time constraint for a particular ZIP code, information will be added to the patient's chart to clarify a block of time in which 60-minute appointments should be scheduled.

- Members with a time restriction of 8:00 AM – 12:00 PM can be scheduled for appointments between 9:00 AM – 1:00 PM (local time).
  - Appointments are scheduled in 60-minute intervals. To ensure that the entire appointment remains within the time restriction, do not schedule appointments after 12:00 PM.
- Members with a safety restriction of 8:00 AM – 4:00 PM can be scheduled within the block of 9:00 AM – 5:00 PM.
  - Appointments are scheduled in 60-minute intervals. To ensure that the entire appointment remains within the time restriction, do not schedule appointments after 4:00 PM.

Market / Metro Care Coordinators can schedule visits outside of the time restriction posted on dates that the Safety Chaperone is escorting the clinician.

## Patient Communication

If a patient requests to have an appointment outside of the approved time constraint:

- Inform the patient that scheduling availability allows only for the appointments you have offered (within the time constraint).

If the patient asks why their regular visit times have changed, or continues to inquire further:

- Please inform them that there was a change in available appointment time slots that we have available.
  - Please use compassion and empathy when discussing the location of a patient's home, neighborhood, or town. Referring to these areas as "unsafe" to a **IS NOT** a kind or productive way to deliver Safety Zone information.

## Resources & Policies

[Safety Center of Excellence Website](#)

[HouseCalls Safety Risk Assessment Policy](#)

[HBMC Safety Policy](#)

[HBMC Member Chart Eligibility Policy](#)

[HBMC DNV \(Do Not Visit\) Procedure](#)

## Address & Contact Updates in Ubiquity

A patient's Visiting Address or authorized contact listings may be updated if requested by a patient or authorized caller.

- If any aspect of the patient's chart is updated, please note any changes made in the "Action Taken" section of your Ubiquity note for documentation purposes.

### Visiting Address Updates

1. Navigate to the **Demographics** section of the patient's chart:
  - Locate the **Visiting Address**.
  - Click the edit icon beside **Address** to update it.
2. Update the necessary fields in the pop-up and click **Save & Close** when done:
  - Ask the caller if there are any special instructions for finding / entering the home and enter the information into the **Geographical Notes** field.
3. During your after-call documentation, add an "Action Required" segment with instructions directing a market CC to review the patient's upcoming appointments and identify any conflicts with the new visiting address.

The screenshot shows the Ubiquity software interface. On the left, a sidebar menu includes Clinical Summary, Demographics (which is selected and highlighted in green), Operational Summary, Note, and Visit Scheduling. Below the sidebar, the date 2/23/2023 and telephone number Kristine Delous are displayed. The main window displays 'Contact Information' with sections for Address, Home, Mailing, and Visit. The 'Address' section contains three tabs: Geographical Note, Geographical Note, and Geographical Note. A red box highlights the edit icon (pencil) in the top right corner of the Address section. Below this, a detailed address editor is open. It includes fields for Street 1 (Ex 132 My Street, Kingston, New York), Street 2 (Manually Enter - Address Not Found), City (60660 xxxxxxxx 66), State (33331), Zip Code (Home), Residence Type, End Date (MM/DD/YYYY), and Geographical Notes (Mobile Home, 1 cat). A red box highlights the 'Save & Close' button at the bottom right of the editor.

## Contact Updates

1. Navigate to the **Demographics** section of Ubiquity and locate the patient's authorized contact listings:
  - Click the edit icon to the right of the **Contacts** label.
2. Update the necessary fields in the pop-up as needed:
  - If adding a new contact, fill in the necessary fields and click **Add**.
  - The text fields will populate with the contact's information. Make any edits necessary and then click "Update".
  - Click "Save & Close" when complete.

The screenshot displays the OptumCare software interface. On the left, the 'Clinical Summary' sidebar is visible with the 'Demographics' tab selected. The main window shows a 'Mobile Home, 1 cat' record under 'Phone Numbers'. Below it is a 'Contacts' table with columns: Name, Relationship, Phone Number (Home/ Mobile), Phone Number (Work/ Other), Landmark Patient, Lives in Household, Out of State, Primary Contact for Health-Related Issues, and Currently Active. An edit icon (pencil) is highlighted with a red box in the 'Currently Active' column of the last row. To the right, a 'Edit Contacts' dialog box is open, titled 'Add Contacts'. It includes fields for 'First Name', 'Middle Name', 'Last Name', 'Relationship', 'Phone Number 1', 'Phone Number 2', 'Email', 'Type', and several checkboxes for contact details like 'Primary Contact for Health-Related Issues', 'Contact is a Landmark Patient', etc. At the bottom of the dialog are 'Add' and 'Cancel' buttons. Below the dialog, a preview of the updated contact list is shown in a grid format with edit and delete icons. The bottom of the screen features buttons for 'Discard Changes', 'Close', and 'Save & Close'.

- If updating an existing contact, click the edit icon beside the contact listing.
3. Indicate any changes you made to the "Contacts" section in your after-call documentation.

## Valid Verbal Consent

The patient must provide verbal authorization for any personal relation or acquaintance to receive PHI on their behalf if the individual does not appear in the Alerts, Demographics, or Documents sections of the chart.

1. If not already on the phone, politely request to speak with the patient to obtain a verbal contact authorization.
  - If the patient is not available, inform the caller that you cannot provide the requested information at this time and verbal permission must be obtained from the patient or qualifying legal guardian prior to the sharing of any Protected Health Information (PHI).
2. When speaking to the patient, ask them to confirm their first name, last name, date of birth, and full address including city, state, and ZIP code.
3. Once confirmed, obtain verbal permission to speak to the contact on their behalf.
  - If the patient confirms that they are providing an ongoing authorization, add the contact to the chart's **Contacts** section.

## Patient & Contact Verification

*Learn more about patient and contact verification in the [Company Resources & Employee Reference Job Aid](#).*

*Indicate any updates made to the patient's chart in your Ubiquity note documentation.*

## Local Community Resources & Services Advisory

Patients may inquire about services that we do not offer, such as grocery delivery, transportation, home health aide services, or additional support available in their local community:

These resources are linked in the [Metros Summary](#) profile cards beside “**Local Resources**”.

Green Bay		<a href="#">Back to Metros List</a>
<b>Time Zone:</b> Central (CST)	<b>Office Phone:</b> (833) 247-9620	<b>Emails:</b>
<b>State:</b> Wisconsin	<b>Office Fax:</b> (888) 618-3543	Triage Callback: <a href="mailto:greenbaytriage@landmark.pure.cloud">greenbaytriage@landmark.pure.cloud</a>
<b>Region:</b> Midwest	<b>Outreach:</b> (877) 240-3112	LM1 APC Escalation: <a href="mailto:APPgreenbayEscalation@landmark.pure.cloud">APPgreenbayEscalation@landmark.pure.cloud</a>
<b>Office Address</b> 4650 W Spencer Street Suite 15 Appleton, WI 54914	<b>Escalation Ext:</b> 324	Metro Call Center: <a href="mailto:call_center_greenbay@optum.com">call_center_greenbay@optum.com</a>
	<b>Local Resources:</b> <a href="#">Open List</a>	Central Outreach: <a href="mailto:centraloutreachescheduling@optum.com">centraloutreachescheduling@optum.com</a>

### Resource List Updates

If you discover that a Local Resource listing is out of date, please notify the LM1 Training Team at [LM1Training@optum.com](mailto:LM1Training@optum.com).

The link will open an Excel spreadsheet in your browser where resources will be listed by category:

#### Example – Food and Meal Resources for WI

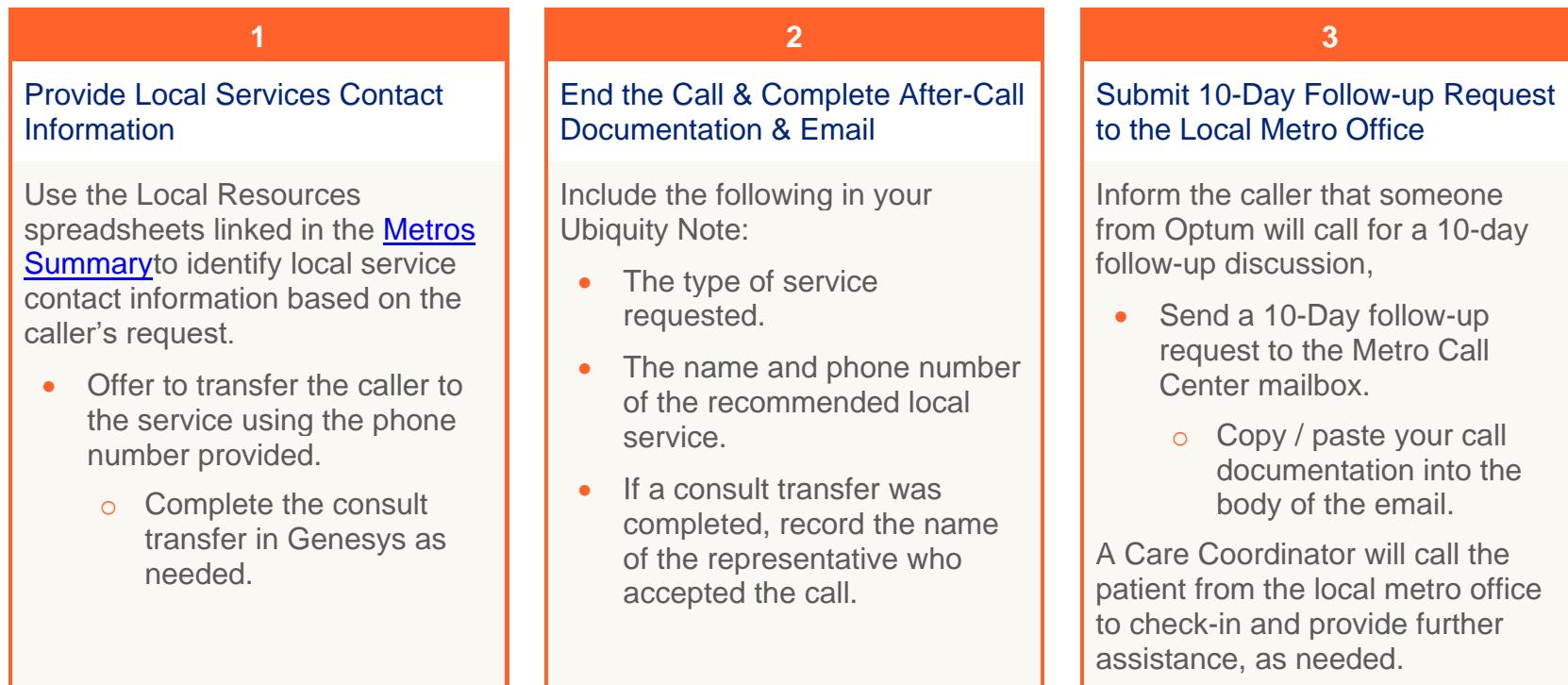
Counties/Boroughs/Cities Served (include zip codes)	Organization	Contact Number
WI/MN	Hunger Task Force	866-211-3380
<a href="#">...   WI - Medication   WI - Health Benefits   WI - Food &amp; Meals   WI - Transportation</a>		

The majority of these tables will be organized into the following categories:

- **Medication** will list resources to assist individuals seeking affordable medications or a medication assistance fund.
- **Health Benefits** will list contacts to assist individuals with insurance company contact and benefits explanations.
- **Food & Meals** will list resources that provide affordable solutions for groceries, meals, or food delivery.
- **Transportation** will list local transportation resources.

Please note that we cannot determine or guarantee if the caller qualifies for these services or if these services are covered by their health plan.

## Community or Local Service Request Workflow



Back to Metros List	
<b>Emails:</b>	
Triage Callback:	<a href="mailto:greenbaytriage@landmark.pure.cloud">greenbaytriage@landmark.pure.cloud</a>
LM1 APC Escalation:	<a href="mailto:APPgreenbayEscalation@landmark.pure.cloud">APPgreenbayEscalation@landmark.pure.cloud</a>
Metro Call Center:	<a href="mailto:call_center_greenbay@optum.com">call_center_greenbay@optum.com</a>
Central Outreach:	<a href="mailto:centraloutreachscheduling@optum.com">centraloutreachscheduling@optum.com</a>



	From	<input type="text" value="paul.nichols@optum.com"/>
	To	<input type="text" value="Call Center Green Bay;"/>
Send	Cc	<input type="text"/>
Subject Jennifer Iris Maloney (0000000) Maine		
(Copy / Paste the contents of your call documentation here)		

## Prospective Patient Requests for Services or Enrollment

As our company continues to grow, we should expect to receive more calls similar to those described above. The Landmark's Outreach team is responsible for acclimating new patients to our services.

- You are encouraged to provide the following information when a caller asks about us for the first time:

**Question:** *What is Landmark?*

**Answer:** Landmark provides home health care solutions for patients with qualifying chronic conditions.

**Question:** *Am I eligible for Landmark? How do I sign up?*

**Answer:** Prospective patients should check their eligibility for Landmark services by contacting their health plan.

- A health plan phone number can usually be found on the back of the prospective patient's insurance card.
- If the prospective patient qualifies for service, their health plan will contact Landmark's Outreach Team.

**Question:** *If I qualify for enrollment, what are next steps?*

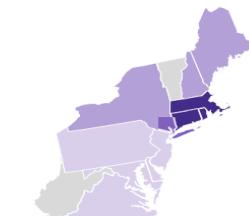
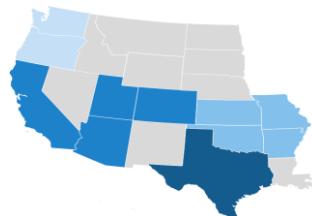
**Answer:** The Central Outreach Team will then attempt to set up an Initial Visit at the patient's home.

- Expect to receive calls from Landmark or Optum Home Health to set up an Initial Visit.

## Transition Program Patients

As of August 2024, the following metros were closed due to a change in the Cohort Modification algorithm. This change reduced the percentage of clinically complex patients we serve from 10% to 5%. With this reduction in service, some metros were too small to remain open.

### Closed Metros



West	Central	Southeast	East
<ul style="list-style-type: none"><li>Tucson</li><li>Bay Area</li><li>Sacramento</li><li>San Diego</li><li>Inland Empire</li><li>San Antonio</li></ul>	<ul style="list-style-type: none"><li>Indianapolis</li><li>Fort Wayne</li><li>Minnesota</li></ul>	<ul style="list-style-type: none"><li>Pensacola</li><li>Chattanooga</li><li>Memphis</li><li>Tri-Cities</li><li>Gainesville</li><li>Jacksonville</li><li>Fort Meyers</li></ul>	<ul style="list-style-type: none"><li>Maine</li><li>Eastern Virginia</li></ul>

### Transition Program Patients in Ubiquity

Look for the blue “Transition” tag located in the upper-right corner of their Ubiquity chart.

- Refer to the **Alerts**, **Patient Notes**, and **HSPI Tab** sections of the chart as sources of truth for administrative management.

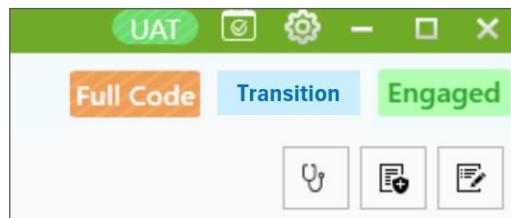
A screenshot of the OptumCare Ubiquity interface. It shows a patient chart with a header bar containing "UAT", a user icon, a gear icon, a minus sign, a square icon, and an X. Below the header are three tabs: "Full Code" (orange), "Transition" (blue, highlighted), and "Engaged" (green). At the bottom of the chart are three icons: a clipboard, a patient profile, and a search function. To the right of the chart is a "Patient Notes" section with a red header. Below the header, a note reads: "Do not schedule patient; no longer eligible for HBMC services".

## Transition Program Patient Calls

As of **January 1, 2025**, Transition Program Patients will no longer have access to HBMC Services, including telephonic support provided by Landmark First. If a Transition Program Patient calls after this date:

1

Provide HBMC Service Transition Program Information



Inform the caller that they are no longer receiving HBMC services.

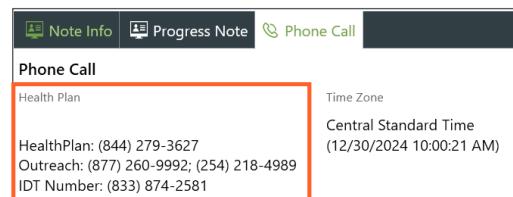
- Offer to transfer the caller to their health plan where they can request more information.

### Suggested Script

*"After reviewing your records, I see that you are no longer eligible for Landmark services. Your health plan will be able to provide additional information, would you like for me to transfer you?"*

2

Health Plan Consult Transfer (Optional)



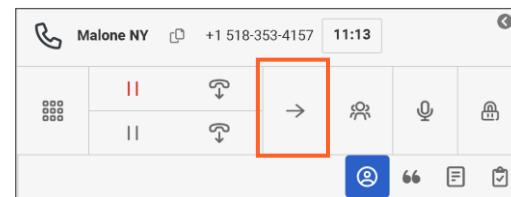
You may find a caller's health plan information under the "Phone Call" tab of your Ubiquity note.

Use this information to complete a consult transfer to the caller's health plan using Genesys.

- If the caller declines to speak to their health plan, complete the call without attempting a consult transfer.

3

Complete the Consult Transfer to End the Call



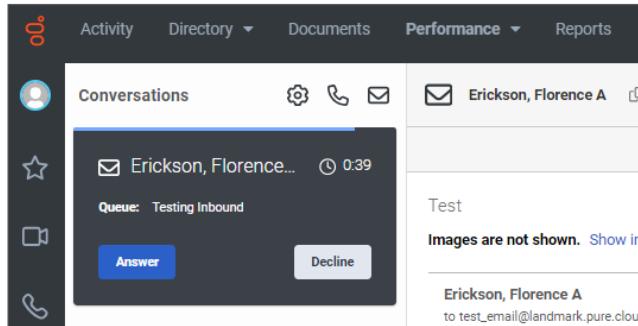
Ensure that you have connected the patient to an insurance representative before completing the consult transfer.

# Answering Service Messages & Callback Requests

## Answering Service Messages

If no LM1 PCC is available to answer an incoming call, the caller will be directed to the Answering Service. This service will document a brief message from the caller and forward it to Genesys in the form of an email.

- LM1 PCCs will receive Answering Service Emails while On Queue in Genesys.
- These emails will “ring” into Genesys just like an incoming call.



- Review patient, caller, and callback numbers carefully to determine the correct workflow to complete.
- It is considered best practice to open the patient's chart in Ubiquity before initiating an outbound call.

### Example: Answering Service Messages

The screenshot shows an email message from 'Erickson, Florence A' with the subject 'Testing Inbound Test'. The message body contains the text: 'Images are not shown. Show images below', 'Erickson, Florence A to test\_email@landmark.pure.cloud', 'Test', 'Florence Erickson (she/her) Director, Operations & Implementations Optum Home & Community Care | Landmark Health florence.erickson@optum.com', and a disclaimer about the email being confidential. At the bottom, there are 'Reply' and 'Forward' buttons.

## Answering Service Message Workflow

1

### Review Message & Patient Details

The screenshot shows the Genesys interface with a message from 'Erickson, Florence A'. The message content is 'Testing Inbound Test'. The interface includes standard communication icons (phone, email) and a timestamp of '1 min'.

Set your Genesys status to **Answering Service**:

Use the information in the answering service message to:

- Search and open the patient's chart in Ubiquity.
- Define the caller's request as:
  - Administrative
  - Market Request
  - Non-Urgent Clinical
  - Urgent Clinical
  - Emergency Clinical
  - Prescription Refill

2

### Complete the Requested Workflow

The screenshot shows the Genesys interface with the same message from 'Erickson, Florence A'. The phone icon in the header is highlighted with a red box. The message content is 'Testing Inbound Test'.

Refer to the **Answering Service Message & Callback Workflows** table in this section to determine the workflow that best matches the caller's request.

For Administrative calls, contact the caller from the Interactions panel using the phone number specified in their message

- If no answer, follow the "Voicemail Guidelines" and end the call. Create a Note in Ubiquity to indicate a callback was attempted.

3

### Submit an Answering Service Reply

The screenshot shows an email message from 'Director, Operations & Implementations' at 'Optum Home & Community Care | Landmark Health' with the subject 'Test'. The message body contains a note about email confidentiality. At the bottom, the 'Reply' button is highlighted with a red box.

Use the "Reply" button located at the bottom of the Answering Service message to open a response email.

- Use the **Answering Service Message Reply Options** table on the next page to complete the email.
- Copy / paste the contents of the Answering Service message, including your reply, into your Ubiquity Note.
- When finished, click "Send"
- Finalize your Ubiquity Note.

## Answering Service Message Reply Options

Reason For Call	Answering Service Message Reply
Administrative	Administrative – Complete – ( <b>your first and last name</b> )
Return Call to Metro Staff	Administrative – Complete – ( <b>your first and last name</b> )
Non-Urgent Clinical	Administrative – Sent to Triage – ( <b>your first and last name</b> )
Prescription Refill	Administrative – Sent to APC – ( <b>your first and last name</b> )

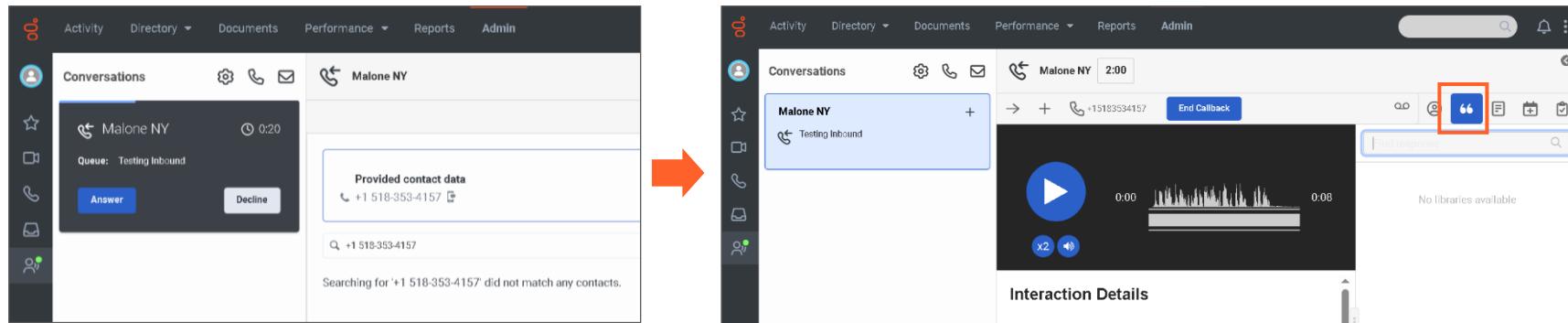
## Example: Answering Service Message Reply

The screenshot shows a messaging application interface. On the left, there is a sidebar titled "Conversations" with a gear icon, a phone icon, and an envelope icon. Below this, a message from "Nichols, Paul J" is listed, with the subject "Testing Inbound Test" and the timestamp "just now". The main area shows an incoming message from "Nichols, Paul J" with the subject "Test". The message body contains the text "Administrative - Complete - Paul Nichols". This text is highlighted with a red rectangle. Below the message, the recipient information is shown: From: paul.nichols@optum.com, Sent: Monday, December 30, 2024 12:55 PM, To: test\_email@landmark.pure.cloud, Subject: Test. A horizontal line follows this information. The message body then contains the word "Test". A signature "Paul Nichols" is present at the bottom. A toolbar with various text formatting options (Text, Bold, Italic, Underline, etc.) is visible above the signature. At the bottom right, there are icons for trash, edit, and send, along with the text "Draft saved" and a blue "Send" button.

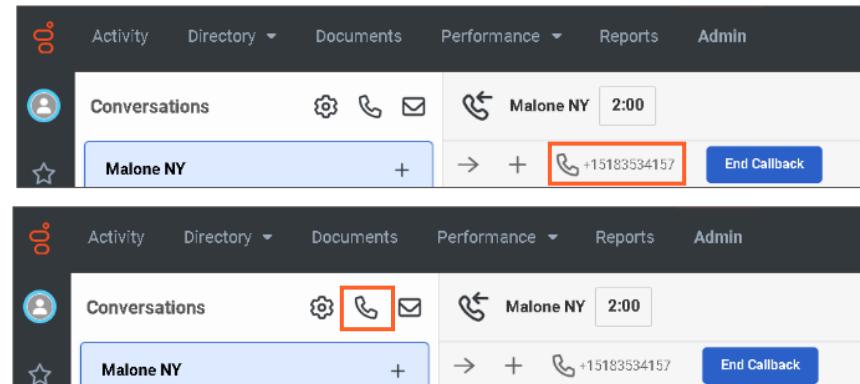
## Callback Requests

When incoming calls are queued for Landmark First, the caller is offered the option to leave a callback message, like a voicemail, to be sent to a LM1 PCC for follow-up. These callback requests are received and completed in Genesys:

- Callback requests will “ring” into Genesys just like an incoming call.
- When answered, the LM1 PCC will be presented with a recorded message to review.
  - If you **DO NOT** see a recorded message, but the blue “**End Callback**” button is visible, select the quotation mark icon to display the call recording.



- If the caller requests to be called on the same number used to contact us, click the phone number displayed above the call recording to initiate a callback.
- However, if the caller requests a callback to an alternate phone number, proceed to make a new outbound call by selecting the ‘Phone’ icon from the Interactions panel.



# Local Metro Call Transfers

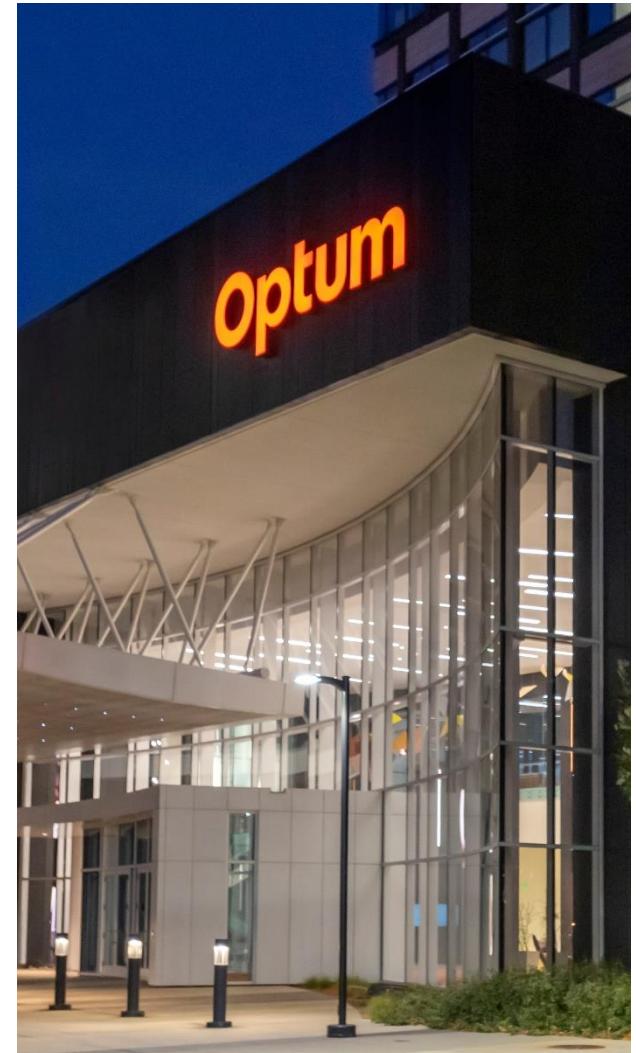
## Table of Contents

- [Metro Contact Overview](#)
- [Care Coordinator Consult Transfer Guidelines](#)
- [Central Outreach Team Consult Transfer Guidelines](#)
- [Centralized Hospice Team Consult Transfer Guidelines](#)
- [Return Calls to Metro Office Staff](#)
- [Other Call Types](#)
- [Alert Care Patients](#)

## Metro Contact Overview

As a general rule, we will try to resolve a caller's question or concern remotely at Landmark First before transferring the caller to a market office. However, there are some requests that should first be managed by local metro staff.

When calling a metro, follow all transfer and patient verification guidelines that you would within Landmark First.



## Care Coordinator Consult Transfer Guidelines

Care Coordinators (CCs) working from local metro offices should be contacted when a patient or caregiver submits an administrative request outside of the LM1 PCC workflow scope. For example, if a patient requested to cancel a Palliative Co-Visit, the metro Care Coordinators should manage that call. Metro CCs can accept consult transfers during local business hours:

- Care Coordinators work during local business hours between **8:30 AM and 5:30 PM**.
  - After business hours, send an email to the Metro Call Center mailbox found in the [Metros Summary](#).

The diagram consists of three panels, each showing a screenshot of a telephone interface:

- Panel 1: Place the Call on "Hold"**

Call details: Malone NY, +1 518-353-4157, 0:52. Control buttons include a red-bordered hold button. A note says "Provided contact data +1 518-353-4157".

**Suggested Script:** "May I place you on hold and transfer you to a local Care Coordinator to further assist you?"

**During local metro business hours:** obtain the caller's verbal consent to be placed on hold.

  - The hold button will light up in red when active.
- Panel 2: Consult the "CC Transfer Queue"**

Call details: Malone NY, +1 518-353-4157, 0:58. Control buttons include a search bar with "cc t" and a red-bordered "CC Transfer Queue" button.

**Initiate a consult transfer to the CC Transfer Queue.**

  - If you are unable to reach a CC after entering the metro's extension and two (2) minutes of hold time, send a follow-up email to the **Metro Call Center** mailbox found in the [Metros Summary](#).
- Panel 3: Enter the 3-Digit Metro Escalation**

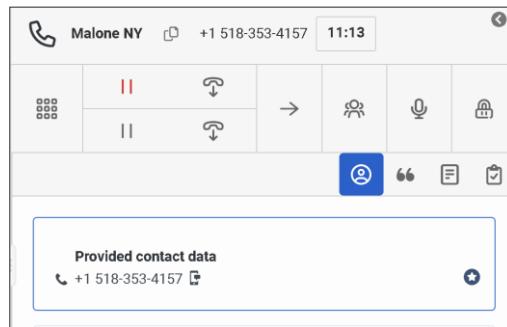
Call details: Malone NY, +1 518-353-4157, 17:50. Control buttons include a dial pad. A note says "Refer to the Metros Summary profile carts to determine the metro-specific 3-digit Escalation Extension."

  - Use the Dial Pad option to enter the extension.
  - You may be asked to re-enter or confirm the extension.
  - Once confirmed, hold for an LM1 Clinician to respond.

\*This workflow is continued on the next page.

4

#### Follow Call Transfer Guidelines



Introduce yourself and your role to the metro CC and follow call transfer guidelines.

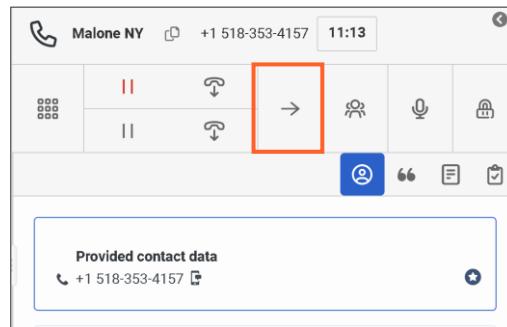
Refer to the [Company Resources & Employee Reference Job Aid](#) for transfer guidelines to provide:

- The caller's name.
- The caller's relationship to the patient, company, or agency.
- Caller's authorization status.
- Did the caller complete patient HIPAA verification?

The patient will remain on hold during this time.

5

#### Complete the Call Transfer



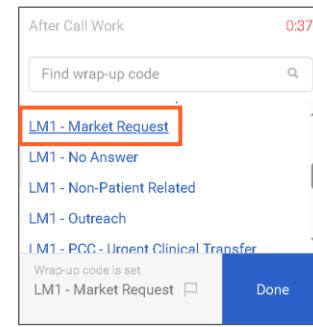
Briefly summarize the caller's question, concern, or reason for transfer.

- Allow the metro CC time to open the patient's chart.
- Select the "Transfer" button when the metro CC indicates they are ready to speak with the caller.

This will complete the transfer and end the call for the LM1 PCC.

6

#### Complete Call Disposition & Document Ubiquity



You will have 60 seconds to complete your call wrap-up report. Select the **LM1 – Market Request**.

- Create, complete, and finalize a note in Ubiquity to detail the interaction and transfer.
  - Follow guidelines in the [Call Documentation](#) section of this job aid.

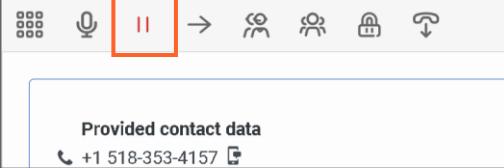
This completes the workflow.

## Central Outreach Team Consult Transfer Guidelines

The Central Outreach Team operates between **8:00 AM** and **8:00 PM EST**. They are available to speak with new patients about our services, or help a prospective patient with the enrollment process and follow-up. The Central Outreach team will accept consult transfers during operating hours.

**1**

Place the Call on "Hold"



Provided contact data  
+1 518-353-4157

**During local metro business hours**, obtain the caller's verbal consent to be placed on hold.

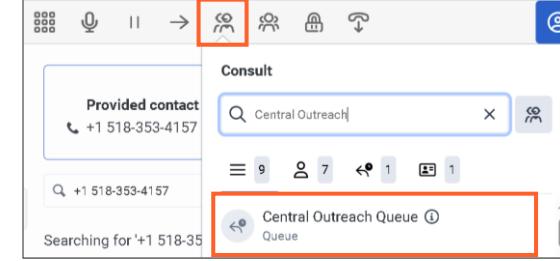
- The hold button will light up in red when active.

### Suggested Script

"May I place you on hold and transfer you to a member of our outreach team. They will be able to answer your service-related questions or offer guidance about enrollment."

**2**

Consult the "Central Outreach Queue"



Provided contact  
+1 518-353-4157

Searching for '+1 518-353-4157'

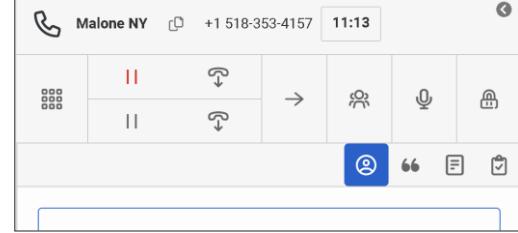
Central Outreach Queue

Initiate a consult transfer to the **Central Outreach Queue**.

- If you are unable to reach a Central Outreach representative after two (2) minutes of hold time, send a callback request to:  
[centraloutreachscheduling@optum.com](mailto:centraloutreachscheduling@optum.com)

**3**

Follow Call Transfer Guidelines



Malone NY +1 518-353-4157 11:13

Central Outreach Queue

Introduce yourself and your role to the Central Outreach representative and follow call transfer guidelines in the [Company Resources & Employee Reference Job Aid](#).

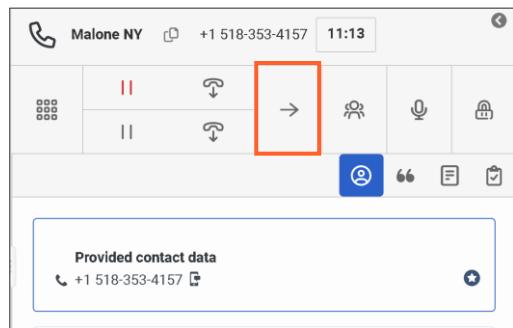
- The caller's name.
- The caller's relationship to the patient, company, or agency.
- Caller's authorization status.
- Did the caller complete patient HIPAA verification?

The patient will remain on hold during this time.

\*This workflow is continued on the next page.

4

#### Complete the Call Transfer



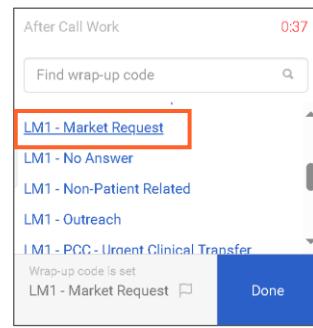
Briefly summarize the caller's question, concern, or reason for transfer.

- Allow the Central Outreach representative time to open the patient's chart.
- Select the "Transfer" button when the Central Outreach representative indicates they are ready to speak with the caller.

This will complete the transfer and end the call for the LM1 PCC.

5

#### Complete Call Disposition & Document Ubiquity



You will have 60 seconds to complete your call wrap-up report. Select the **LM1 – Market Request**.

- Create, complete, and finalize a note in Ubiquity to detail the interaction and transfer.
  - Follow guidelines in the [Call Documentation](#) section of this job aid.

This completes the workflow.

#### General HBMC Service Information

LM1 PCCs can provide general HBMC service information to callers. Reference the **Prospective Patient Requests for Services or Enrollment** section of this job aid for more information.

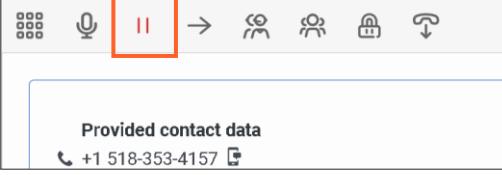
# Centralized Hospice Team Consult Transfer Guidelines

The Centralized Hospice Team will accept consult transfers when an LM1 PCC receives a call from a hospice agency with an **administrative concern**.

- Clinical concerns should be transferred to the **RN Transfer Queue** and LM1 PCCs should adhere to clinical call transfer workflows in this job aid.

**1**

Place the Call on "Hold"



Provided contact data  
+1 518-353-4157

**During local metro business hours**, obtain the caller's verbal consent to be placed on hold.

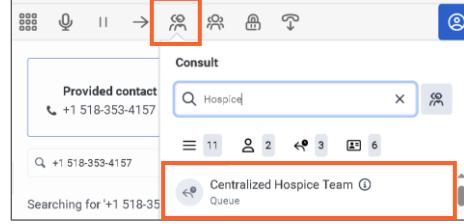
- The hold button will light up in red when active.

## Suggested Script

"May I place you on hold and transfer you to a member of our central hospice team?"

**2**

Consult the "Central Hospice Team"



Provided contact  
+1 518-353-4157

Consult  
Hospice

Searching for '+1 518-353-4157' in Centralized Hospice Team Queue

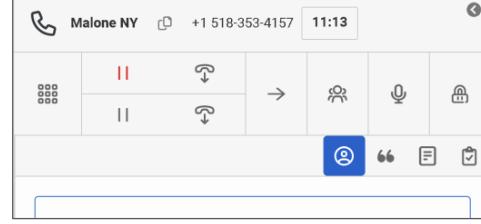
Initiate a consult transfer to the **Central Outreach Queue**.

- If you are unable to reach the Central Hospice Team after two (2) minutes of hold time, send a callback request to Lori Yates at: [lori.yates@uhc.com](mailto:lori.yates@uhc.com).
- Copy / paste the contents of your ubiquity note into the email.

\*This workflow is continued on the next page.

**3**

Follow Call Transfer Guidelines



Malone NY +1 518-353-4157 11:13

Centralized Hospice Team Queue

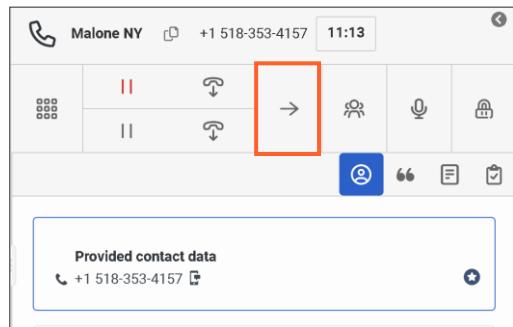
Introduce yourself and your role to the Central Hospice Team and follow call transfer guidelines in the [Company Resources & Employee Reference Job Aid](#):

- The caller's name.
- The caller's relationship to the patient, company, or agency.
- Caller's authorization status.
- Did the caller complete patient HIPAA verification?

The patient will remain on hold during this time.

4

#### Complete the Call Transfer



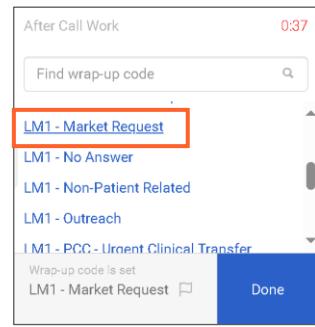
Briefly summarize the caller's question, concern, or reason for transfer.

- Allow the Central Hospice Team time to open the patient's chart.
- Select the "Transfer" button when the Central Hospice Team indicates they are ready to speak with the caller.

This will complete the transfer and end the call for the LM1 PCC.

6

#### Complete Call Disposition & Document Ubiquity



You will have 60 seconds to complete your call wrap-up report. Select the **LM1 – Market Request**.

- Create, complete, and finalize a note in Ubiquity to detail the interaction and transfer.
  - Follow guidelines in the [Call Documentation](#) section of this job aid.

This completes the workflow.

## Return Calls to Metro Office Staff

When a patient returns a call left by HBMC staff working from a local metro office, LM1 PCCs should follow all administrative and clinical transfer workflows. Reference the table below for more information:

Call Type:	Business Hours (8:30 AM – 5:30 PM Local Market / Metro Time)	After Hours (or unsuccessful warm transfer)
Administrative (within the scope of Landmark First)	Resolved by the LM1 PCC	
Administrative (Outside the scope of Landmark First)	Transfer the caller to a metro Care Coordinator between the hours of <b>8:00 AM</b> and <b>8:00 PM</b> .	Send an email to the Metro Call Center mailbox found in the <a href="#">Metros Summary</a> .
Urgent / Non-Urgent Clinical Concern	Follow the clinical handoff, triage, clinician shortage, & urgent buzzword call flows as needed based on the concern expressed	Follow the clinical handoff, triage, clinician shortage, & urgent buzzword call flows as needed based on the concern expressed
Lab Result Requests or Lab Representative	Attempt a warm (consult) transfer to a LM1 APC and email triage if unavailable.	Attempt a warm (consult) transfer to a LM1 APC and email triage if unavailable.
Market Requests, &Transfers	Check recent notes in Ubiquity, if needed, and attempt a consult (warm) transfer to the original caller.	<ol style="list-style-type: none"><li>1. Note Ubiquity</li><li>2. Notify the original caller in Teams</li><li>3. Send an email to the Care Team and Market</li></ol>

## Other Call Types

These types of calls may not relate directly to patient care, but may involve the updating or disclosure of patient records and should **NOT** be resolved by LM1 PCCs.

### Medical Records Request

If a caller asks to obtain or verify information on two (2) or more medical records, direct them to the Central Medical Records office:

- Phone: (833) 908-6722
- FAX: (844) 576-2533

Do NOT provide any **PHI** to unauthorized callers.

### Service Cancellation Inquiries

1. If possible, obtain the reason why the member wishes to cancel services with Landmark.
2. Create a Note and document the interaction in Ubiquity.
3. Send an email to the member's **Care Team** members and the Metro Call Center mailbox found in the [Metros Summary](#).

### Employment Verification Calls

Please direct these callers to the Employment Verification office:

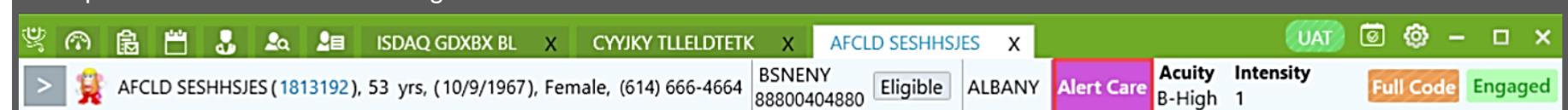
- Phone: (844) 772-2161

## Alert Care Patients

Alert Care patients **DO NOT** have a Care Team assigned to them. Charts in Ubiquity will display with a bright purple indicator in the chart's heading, as shown:

- Call transfer workflows and administrative work is unchanged when managing an alert care patient.
  - For call transfer workflows that require LM1 PCCs to email a patient's Care Team and the Metro Call Center mailbox, email **ONLY** the Metro Call Center mailbox.

### Example: Alert Care Chart Heading



# Non-Urgent Clinical Call Transfers

## Table of Contents

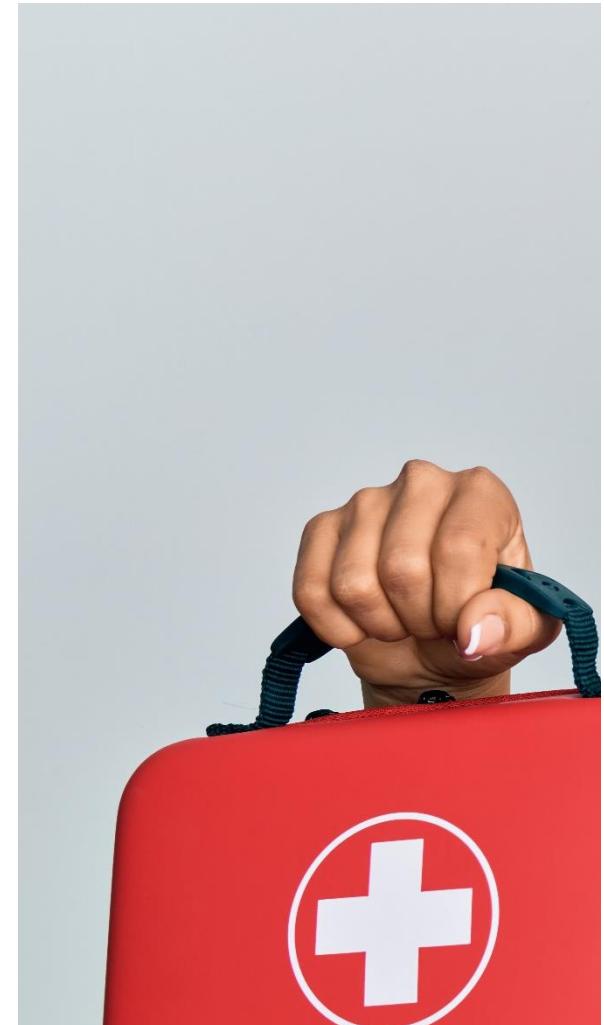
- [Non-Urgent Clinical Consult Transfer Workflow](#)
- [Email Request for LM1 Triage RN Callback](#)
- [Medication / Prescription Refills or Pharmacy Call Workflow](#)
- [Email Request for LM1 APC Callback](#)
- [HouseCalls Request for Clinician](#)
- [Return Call to LM1 Clinician Workflow](#)

### ***LM1 Clinician Scope***

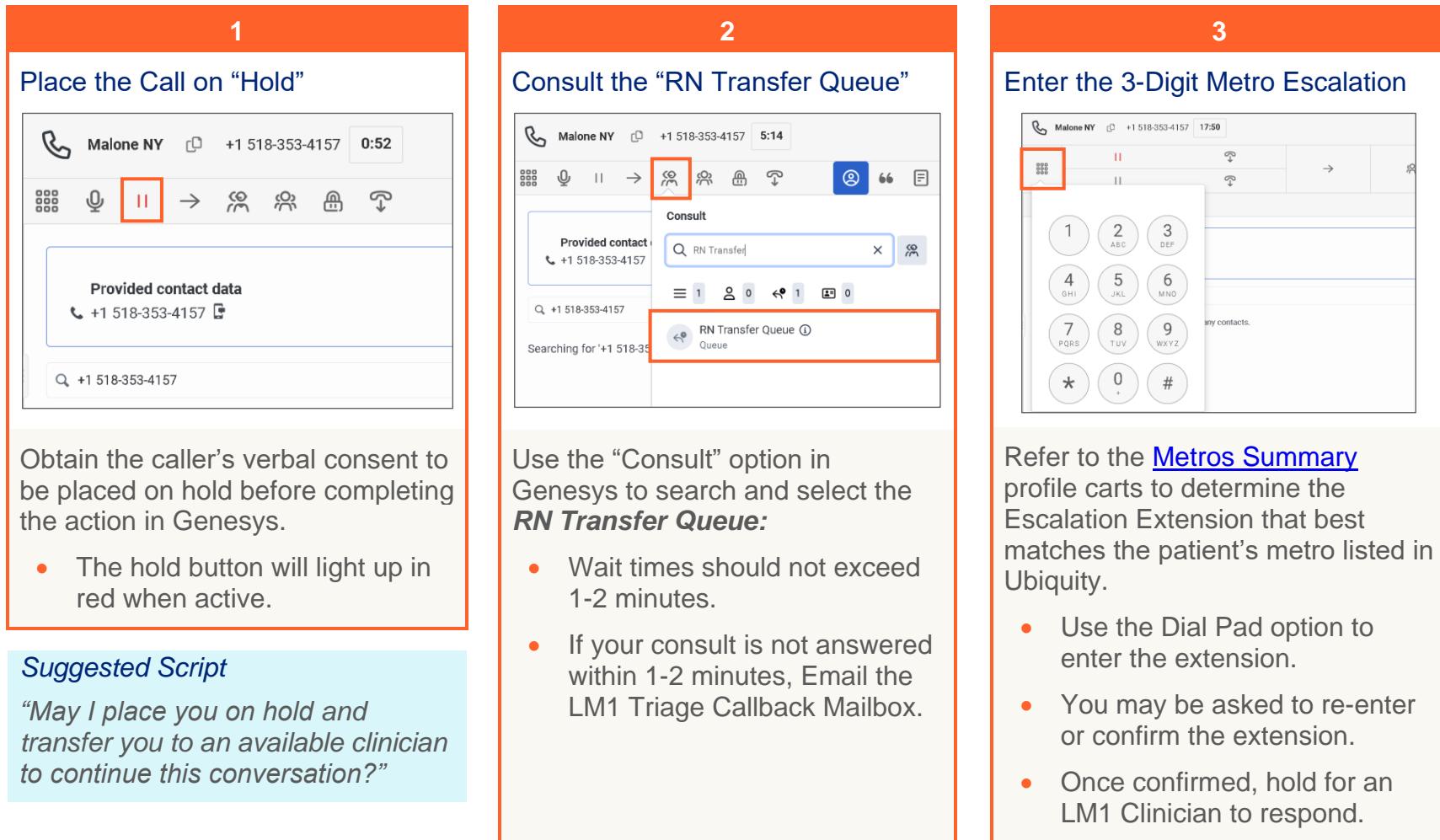
*LM1 PCCs must NOT advise callers about medical care, medication dosage, symptom diagnosis, or any other subject within the clinical scope.*

### ***Urgent Clinical Calls***

*Please see the next section, Urgent Clinical Call Transfers. To review a list of urgent and emergency situations for which care cannot be delayed.*



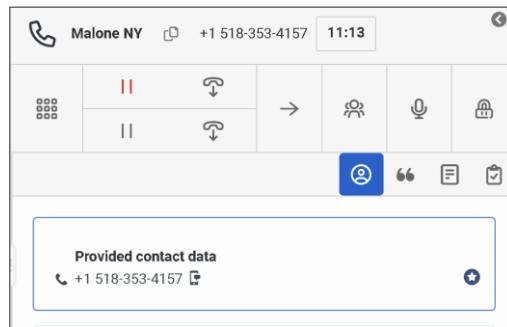
## Non-Urgent Clinical Consult Transfer Workflow



\*This workflow is continued on the next page.

4

#### Follow Call Transfer Guidelines



Introduce yourself and your role to the LM1 Clinician and follow call transfer guidelines.

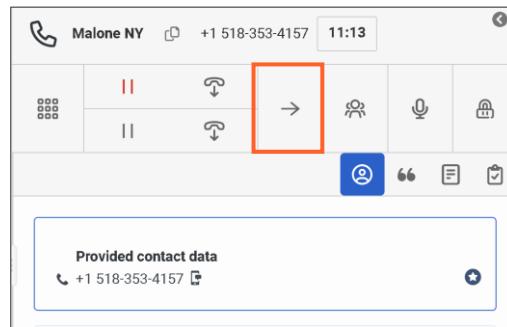
Refer to the [Company Resources & Employee Reference Job Aid](#) for details to provide the following:

- The caller's name.
- The caller's relationship to the patient, company, or agency.
- Caller's authorization status.
- Did the caller complete patient HIPAA verification?

The patient will remain on hold during this time.

5

#### Complete the Call Transfer



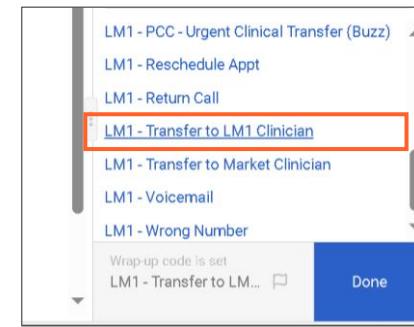
Briefly summarize the caller's question, concern, or reason for transfer.

- Allow the LM1 Clinician time to open the patient's chart.
- Select the "Transfer" button when the LM1 Clinician indicates they are ready to speak with the caller.

This will complete the transfer and end the call for the LM1 PCC.

6

#### Complete Call Disposition & Document Ubiquity



You will have 60 seconds to complete your call wrap-up report. Select the **LM1 – Transfer to LM1 Clinician** and click **Done**.

- Create, complete, and finalize a note in Ubiquity to detail the interaction and transfer.
  - Follow guidelines in the [Call Documentation](#) section of this job aid.

This completes the workflow.

## Email Request for LM1 Triage RN Callback

An email should be sent to a metro-specific LM1 Triage RN Mailbox if:

- ✓ The patient or caregiver has a clinical question / concern.
- ✓ An LM1 Clinician does not answer your consult transfer to the **RN Transfer Queue** after 1-2 minutes of wait time.
- ✓ The caller **CAN** wait up to three (3) hours for a callback.
- ✓ **NO Buzzwords** were used during the call.

### Suggested Script

*"I was unable to reach a clinician to speak to you right now, but I would like to submit a callback request on your behalf so that a clinician will reach out to you within the next three hours. Typically, they will contact you much faster with three hours being the maximum wait time. Is that OK?"*

If the above criteria are met, use the Metro's Summary to select the Triage Callback mailbox matching the patient's metro.

Hartford		<a href="#">Back to Metros List</a>
<b>Time Zone:</b> East (EST) <b>State:</b> Connecticut (CT) <b>Region:</b> New England <b>Office Address</b> Mezz Level 20 Church St. Hartford, CT 06103	<b>Office Phone:</b> (833) 749-2009 <b>Office Fax:</b> (833) 983-2041 <b>Outreach:</b> (877) 240-3112 <b>Escalation Ext:</b> 101	<b>Emails:</b> <b>Triage Callback:</b> <a href="mailto:hartfordtriage@landmark.pure.cloud">hartfordtriage@landmark.pure.cloud</a> <b>LM1 APC Escalation:</b> <a href="mailto:APPhartfordEscalation@landmark.pure.cloud">APPhartfordEscalation@landmark.pure.cloud</a> <b>Metro Call Center:</b> <a href="mailto:call_center_connecticut@optum.com">call_center_connecticut@optum.com</a> <b>Central Outreach:</b> <a href="mailto:centraloutreachescheduling@optum.com">centraloutreachescheduling@optum.com</a>

From  paul.nichols@optum.com

To  [hartfordtriage@landmark.pure.cloud](mailto:hartfordtriage@landmark.pure.cloud)

Cc

Subject John Kent (0000000) Hartford

Patient's Name: J. Kent  
Callback Number: (620) 314-2214

Your email will be sent from Outlook to Genesys where an LM1 Triage RN will review your message & chart to complete the callback.

Because Outlook considers this email to be external, include only the following:

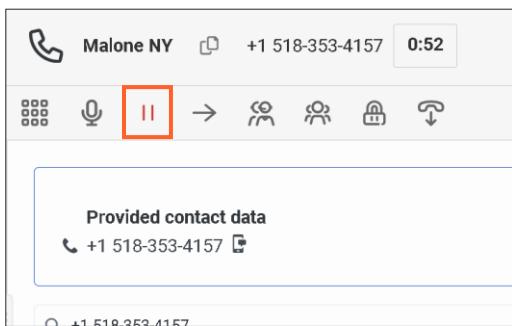
- Use the standard subject line.
  - Patient's name, ID, and Metro.
- The patient's first initial and last name.
- A phone number to be used for callback.

## Medication / Prescription Refills or Pharmacy Call Workflow

Calls from pharmacies or patients / caregivers regarding medication refills should be transferred to the **APC Transfer Queue**:

1

Place the Call on “Hold”



Obtain the caller's verbal consent to be placed on hold before completing the action in Genesys.

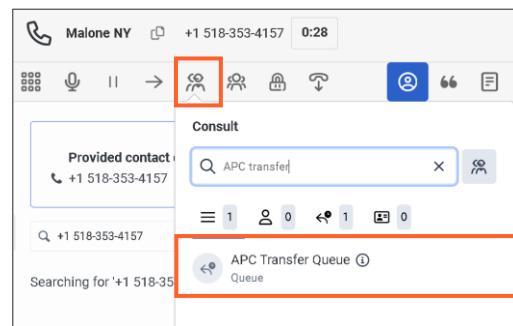
- The hold button will light up in red when active.

### Suggested Script

*“May I place you on hold and transfer you to an available clinician to continue this conversation?”*

2

Consult the “APC Transfer Queue”

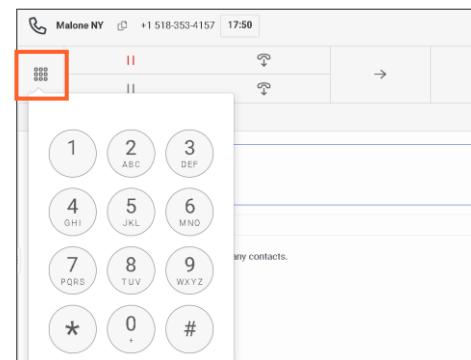


Use the “Consult” option in Genesys to search and select the **APC Transfer Queue**:

- Wait times should not exceed 1-2 minutes.
- If your consult is not answered within 1-2 minutes, Email the APC Escalation Mailbox.

3

Enter the 3-Digit Metro Escalation



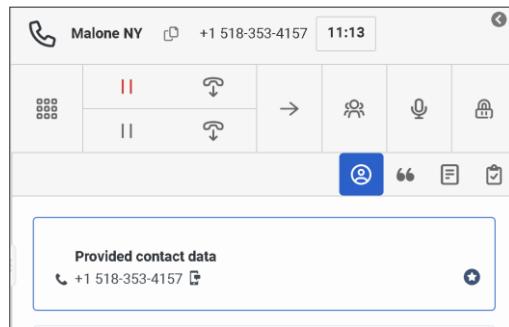
Refer to the [Metros Summary](#) profile carts to determine the Escalation Extension that best matches the patient's metro listed in Ubiquity.

- Use the Dial Pad option to enter the extension.
- You may be asked to re-enter or confirm the extension.
- Once confirmed, hold for an LM1 Clinician to respond.

\*This workflow is continued on the next page.

4

#### Follow Call Transfer Guidelines



Introduce yourself and your role to the LM1 APC and follow call transfer guidelines.

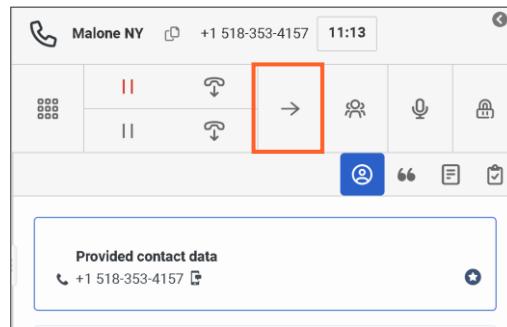
Refer to the [Company Resources & Employee Reference Job Aid](#) for details to provide the following:

- The caller's name.
- The caller's relationship to the patient, company, or agency.
- Caller's authorization status.
- Did the caller complete patient HIPAA verification?

The patient will remain on hold during this time.

5

#### Complete the Call Transfer



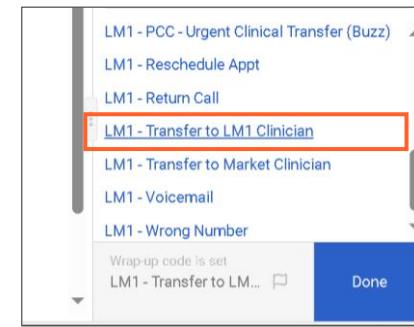
Briefly summarize the caller's question, concern, or reason for transfer.

- Allow the LM1 APC time to open the patient's chart.
- Select the "Transfer" button when the LM1 Clinician indicates they are ready to speak with the caller.

This will complete the transfer and end the call for the LM1 PCC.

6

#### Complete Call Disposition & Document Ubiquity



You will have 60 seconds to complete your call wrap-up report. Select the **LM1 – Transfer to LM1 Clinician** and click **Done**.

- Create, complete, and finalize a note in Ubiquity to detail the interaction and transfer.
  - Follow guidelines in the [Call Documentation](#) section of this job aid.

This completes the workflow.

## Email Request for LM1 APC Callback

An email should be sent to a metro-specific LM1 Triage RN Mailbox if:

- ✓ The patient or caregiver requests a prescription / medication refill and...
- ✓ An LM1 APC does not answer your consult transfer to the “**APC Transfer Queue**” after 1-2 minutes of wait time.
- ✓ **NO Buzzwords** were used during the call.

If the above criteria are met, use the Metro’s Summary to select the LM1 APC Escalation mailbox matching the patient’s metro.

Hartford		<a href="#">Back to Metros List</a>
<b>Time Zone:</b> East (EST)	<b>Office Phone:</b> (833) 749-2009	<b>Emails:</b>
<b>State:</b> Connecticut (CT)	<b>Office Fax:</b> (833) 983-2041	Triage Callback: <a href="mailto:hartfordtriage@landmark.pure.cloud">hartfordtriage@landmark.pure.cloud</a>
<b>Region:</b> New England	<b>Outreach:</b> (877) 240-3112	LM1 APC Escalation: <a href="mailto:APPHartfordEscalation@landmark.pure.cloud">APPHartfordEscalation@landmark.pure.cloud</a>
<b>Office Address</b> Mezz Level 20 Church St. Hartford, CT 06103	<b>Escalation Ext:</b> 101	Metro Call Center: <a href="mailto:call_center_connecticut@optum.com">call_center_connecticut@optum.com</a>
		Central Outreach: <a href="mailto:centraloutreachscheduling@optum.com">centraloutreachscheduling@optum.com</a>

From  paul.nichols@optum.com

To  ExampleLM1APCEscalation@Optum.com

Send

Cc

Subject Terry M. Valentine (0000000) Chicago

Patient's Name: T. Valentine  
Callback Number: (312) 884-4711

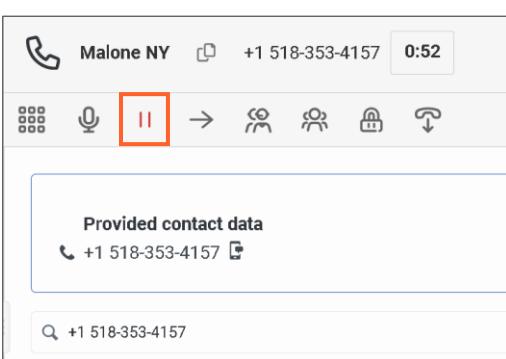
Your email will be sent from Outlook to Genesys where an LM1 APC will review your message and the chart to complete the callback.

Because Outlook considers this email to be external, include only the following:

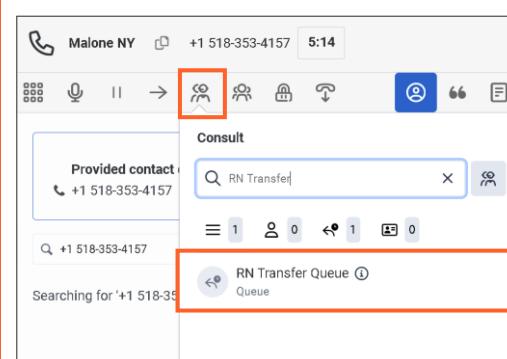
- Use the standard subject line.
  - Patient's name, ID, and Metro.
- The patient's first initial and last name.
- A phone number to be used for callback.

## HouseCalls Request for Clinician

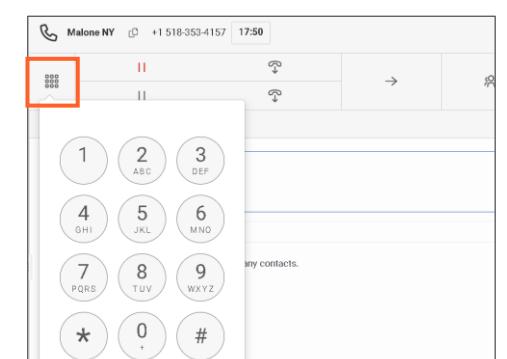
If a representative of HouseCalls requests to speak to a clinician, follow the non-urgent call flow:

- 1**  
Place the Call on “Hold”  


Malone NY +1 518-353-4157 0:52  
Provided contact data +1 518-353-4157  
+1 518-353-4157

Obtain the caller's verbal consent to be placed on hold before completing the action in Genesys.
  - The hold button will light up in red when active.
- 2**  
Consult the “RN Transfer Queue”  


Malone NY +1 518-353-4157 5:14  
Provided contact +1 518-353-4157  
Q +1 518-353-4157  
Searching for '+1 518-353-4157' Queue

Use the “Consult” option in Genesys to search and select the **RN Transfer Queue**:
  - Wait times should not exceed 1-2 minutes.
  - If your consult is not answered within 1-2 minutes, Email the LM1 Triage Callback Mailbox.
- 3**  
Enter the 3-Digit Metro Escalation  


Malone NY +1 518-353-4157 17:50  
1 2 ABC 3 DEF  
4 GHI 5 JKL 6 MNO  
7 PQRS 8 TUV 9 WXYZ  
\* 0 + #

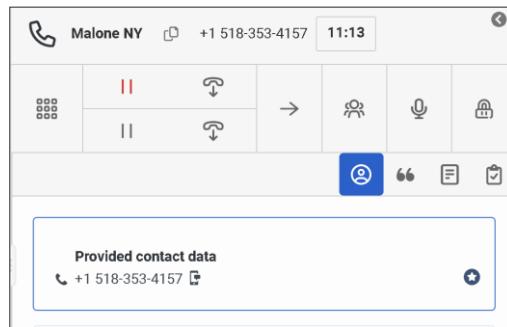
any contacts.

Refer to the [Metros Summary](#) profile carts to determine the Escalation Extension that best matches the patient's metro listed in Ubiquity.
  - Use the Dial Pad option to enter the extension.
  - You may be asked to re-enter or confirm the extension.
  - Once confirmed, hold for an LM1 Clinician to respond.

\*This workflow is continued on the next page.

4

#### Follow Call Transfer Guidelines



Introduce yourself and your role to the LM1 Clinician and follow call transfer guidelines.

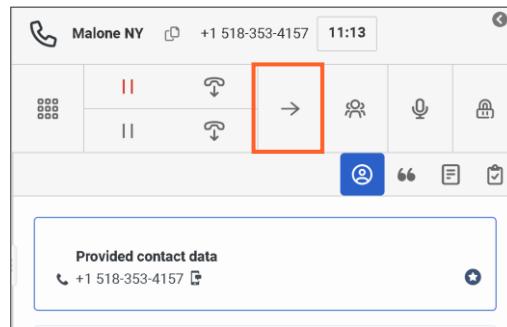
Refer to the [Company Resources & Employee Reference Job Aid](#) for details to provide the following:

- The caller's name.
- The caller's relationship to the patient, company, or agency.
- Caller's authorization status.
- Did the caller complete patient HIPAA verification?

The patient will remain on hold during this time.

5

#### Complete the Call Transfer



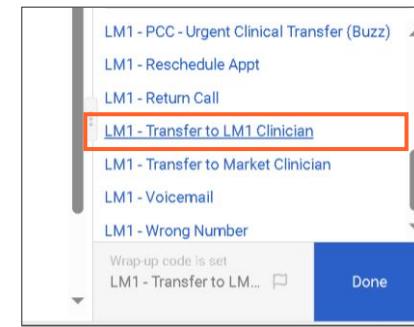
Briefly summarize the caller's question, concern, or reason for transfer.

- Allow the LM1 Clinician time to open the patient's chart.
- Select the "Transfer" button when the LM1 Clinician indicates they are ready to speak with the caller.

This will complete the transfer and end the call for the LM1 PCC.

6

#### Complete Call Disposition & Document Ubiquity



You will have 60 seconds to complete your call wrap-up report. Select the **LM1 – Transfer to LM1 Clinician** and click **Done**.

- Create, complete, and finalize a note in Ubiquity to detail the interaction and transfer.
  - Follow guidelines in the [Call Documentation](#) section of this job aid.

This completes the workflow.

## Return Call to LM1 Clinician Workflow

When a caller responds to a voicemail left by, or any previous contact with, a LM1 Triage RN or LM1 APC:

- These should be treated as **NEW CALLS**.
- LM1 PCCs should make **NO ATTEMPT** to contact, or transfer the caller to, the original LM1 Clinician.
- LM1 Clinicians are expected to continue patient care regardless of who first managed the communication.

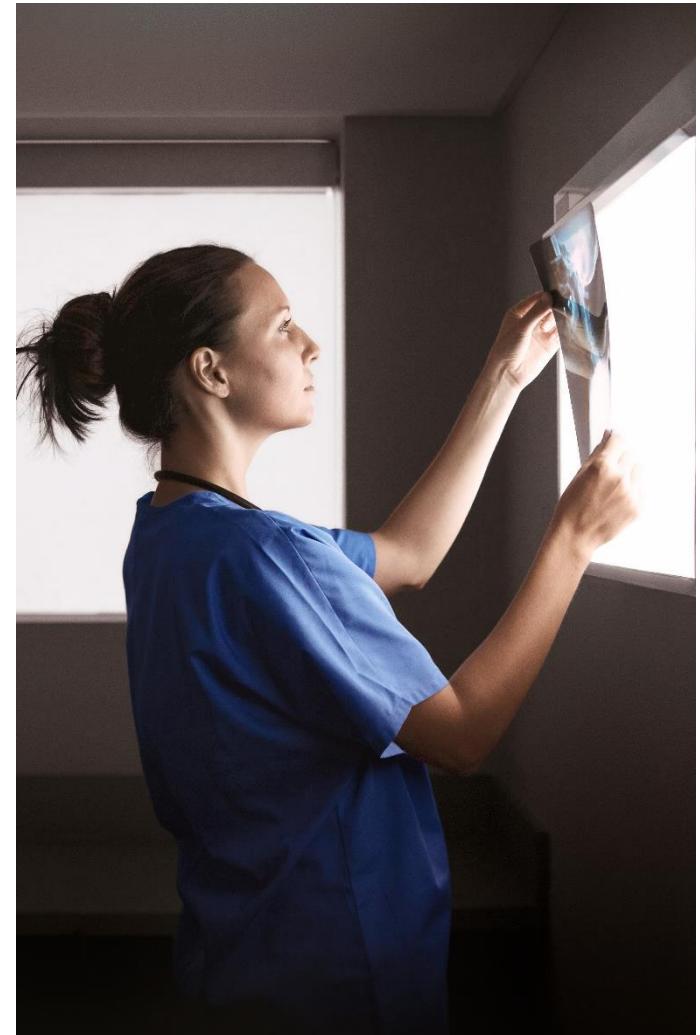
LM1 PCCs are expected to identify and resolve the caller's request or concern by completing the following:

Request	LM1 PCC Workflow / Consult Transfer	Follow-Up
Administrative <i>(Within LM1 PCC Scope)</i>	LM1 PCCs will manage the caller's request and complete call wrap-up and documentation.	
Administrative <i>(Outside LM1 PCC Scope)</i>	<b>During Business Hours</b> – LM1 PCCs will transfer the caller to the CC Transfer Queue	<b>After Hours</b> – LM1 PCCs will send a follow-up request email to the Metro Call Center mailbox.
Non-Urgent Clinical	LM1 PCCs will attempt a consult transfer to the <b>RN Transfer Queue</b>	<b>Unsuccessful Transfer</b> – LM1 PCCs will send a callback request email to the <b>LM1 Triage RN</b> callback mailbox.
Prescription Refill	LM1 PCCs will attempt a consult transfer to the <b>APC Transfer Queue</b>	<b>Unsuccessful Transfer</b> – LM1 PCCs will send a callback request email to the <b>LM1 APC Escalation</b> mailbox.
Urgent Clinical	LM1 PCCs will follow the Urgent Clinical Call Transfer Workflow.	LM1 PCCs will follow the Urgent Clinical Call Transfer Workflow.

# Urgent Clinical Call Transfers

## Table of Contents

- [NENA 911 Database Software Tutorial](#)
- [Urgent Red Buzzwords List & Overview](#)
  - [EMS Consult in Genesys Workflow](#)
- [Urgent Yellow Buzzwords List](#)
- [Yellow Buzzword Call Transfer Overview](#)
  - [Transfer Attempt #1 - LM1 Triage RN Consult Transfer](#)
  - [Transfer Attempt #2 - LM1 APC Consult Transfer](#)
  - [Transfer Attempt #3 - On-Call Provider Consult Transfer](#)
- [LM1 Clinician Shortage Conditions](#)
- [Patient Refuses EMS Workflow](#)
- [Patient Unresponsive or Call Disconnection Workflow](#)
- [Suicidal Patient Guidelines](#)
  - [Immediate Intent Response Workflow](#)
  - [Suicidal Feelings Without Immediate Intent Response Workflow](#)
- [Metro Provider Request for EMS Workflow](#)
- [Medstar & Acadian Requests Workflows](#)



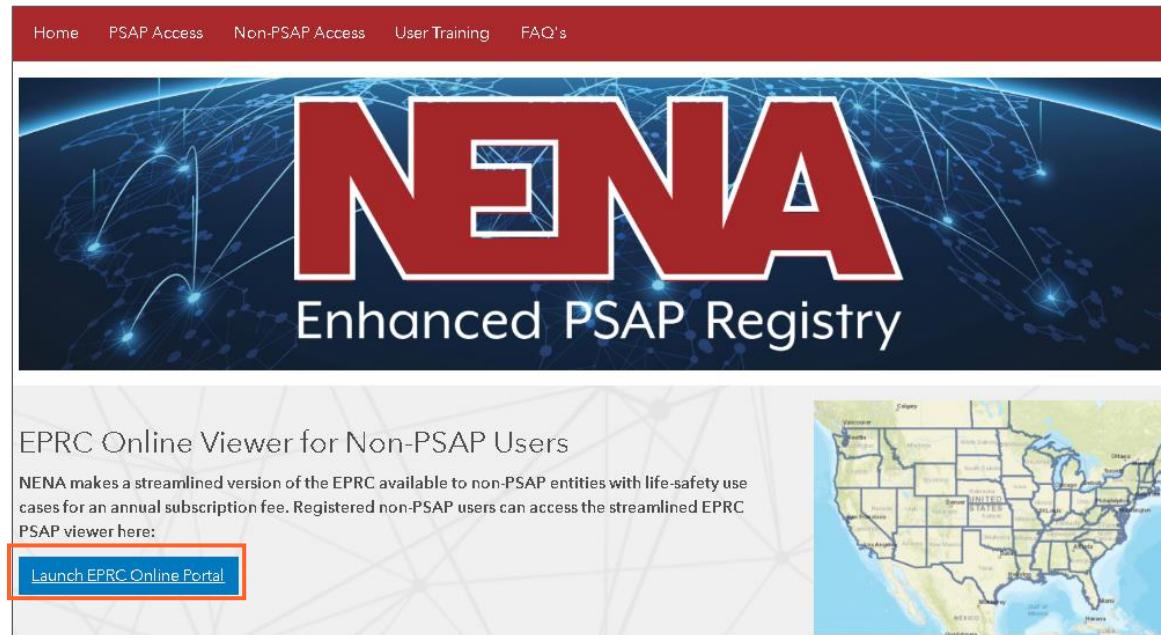
## NENA 911 Database Software Tutorial

When recommending an emergency room (ER) visit to a patient, LM1 PCCs should offer to call Emergency Medical Services (EMS) on their behalf. If a caller consents to this, open the [NENA 911 Database](#) web application and search for local emergency contacts in the patient's area.

- Always log into NENA at the start of your shift.
- Verify that the patient is home, or where the patient is located if they are not home, before searching EMS phone numbers.

### Portal Navigation

From the home page, select “Open EPRC Online Portal”. You will be directed to a login screen to enter your NENA Username and password.



Home PSAP Access Non-PSAP Access User Training FAQ's

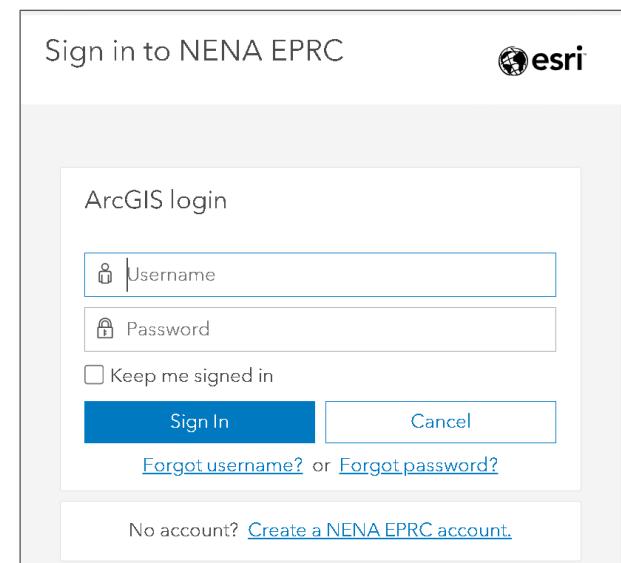
# NENA

Enhanced PSAP Registry

EPRC Online Viewer for Non-PSAP Users

NENA makes a streamlined version of the EPRC available to non-PSAP entities with life-safety use cases for an annual subscription fee. Registered non-PSAP users can access the streamlined EPRC PSAP viewer here:

[Launch EPRC Online Portal](#)



Sign in to NENA EPRC 

ArcGIS login

Username

Password

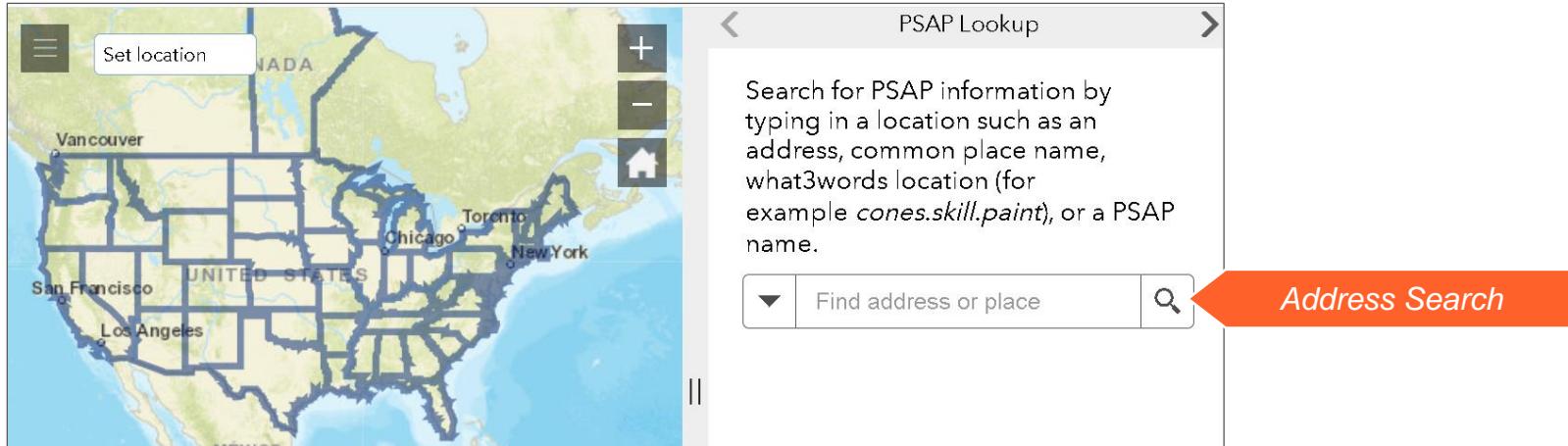
Keep me signed in

[Forgot username?](#) or [Forgot password?](#)

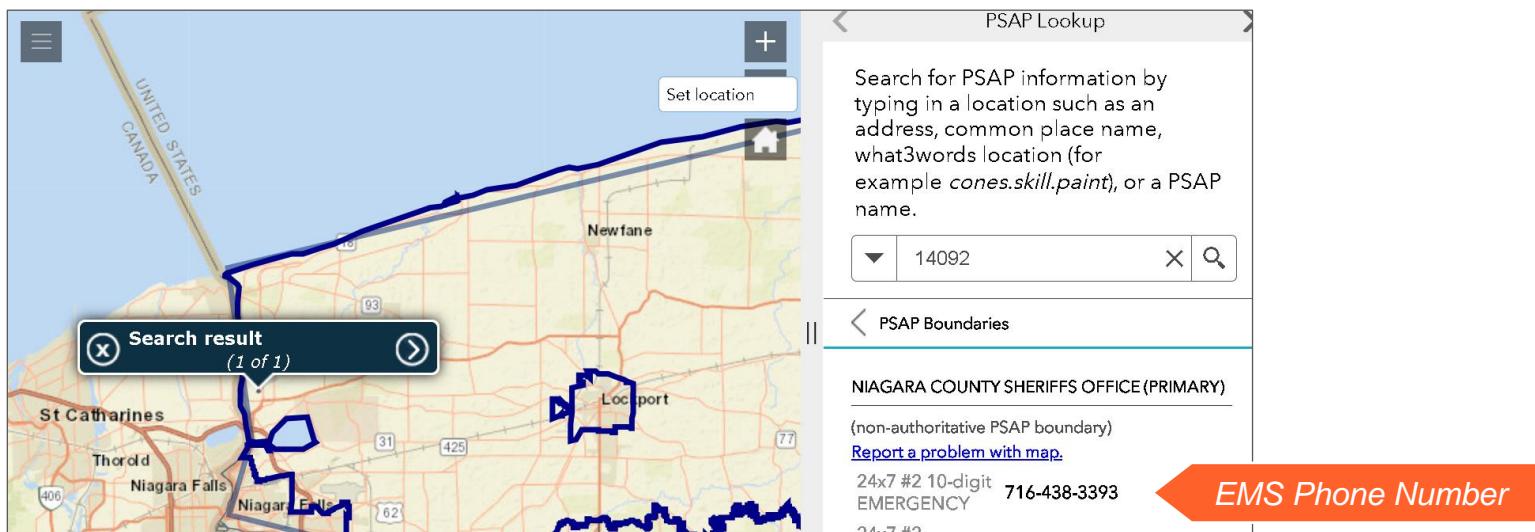
No account? [Create a NENA EPRC account.](#)

## Search EMS Phone Numbers

1. Search EMS contact numbers by the patient's address, or the location provided to you during the call.



2. Use Genesys to Consult the **24x7 #1 10-digit EMERGENCY** or **24x7 #2 10-digit EMERGENCY** phone numbers.



## Urgent Red Buzzwords List & Overview

The use of a **Red Buzzword** during a call indicates that immediate clinical attention **MUST** be provided by EMS.

### Red Buzzwords

- Active Choking
- Throat Closing
- Suicidal Thoughts or Attempt
- Homicidal Thoughts or Attempt
- Unconscious (*not on Hospice*)
- Can't be Aroused (*not on Hospice*)

### Communication Guidelines

Throughout these calls, LM1 PCCs are expected to remain calm, reassure the caller, and communicate clearly with the EMS dispatcher.

### No Hold Times

Because these callers are facing immediate emergency symptoms or conditions, they should **NEVER** be placed on hold for any reason.

### Red Buzzwords Workflow



When recommending an ER visit, LM1 PCCs should offer to call EMS on the patient's behalf.

- If accepted, LM1 PCCs will use NENA to locate **the 24x7 Emergency Line** for the patient's location.
- Once found the LM1 PCC will perform a Conference call in Genesys to contact a dispatcher.
- The LM1 PCC will remain on the phone until EMS arrives at the patient's location.
  - The LM1 PCC will follow the **Patient Unresponsive or Call Disconnection Workflow** as needed.

## EMS Consult in Genesys Workflow

**1**

Start a Conference Call with EMS

The Genesys interface shows a call from Malone NY. The top bar includes icons for phone, video, microphone, and volume, along with the time 2:18. Below the bar are several buttons: a grid icon, a microphone icon, a double arrow icon, a person icon, a lock icon, a down arrow icon, a blue person icon, a double quote icon, a list icon, and a calendar icon. A red box highlights the 'Conference' button and the search bar below it. The search bar contains the text '7164383393' and has a red box around its search icon. The main screen displays a 'Provided contact data' section with a phone number '+1 518-353-4157'. Below it is a search bar with the placeholder 'Searching for '+1 518-353-4157''. At the bottom, there are three tabs: '0', '0', and '0'.

Obtain the caller's verbal consent for EMS contact use the **Conference** option in Genesys to enter the EMS phone number provided by NENA.

### Suggested Script

*"I am going to keep you on the line as I call 911. The dispatcher will be sending Emergency Medical Services to you as soon as possible. Please give us any updates if your condition changes."*

**2**

Provide Information to Dispatch

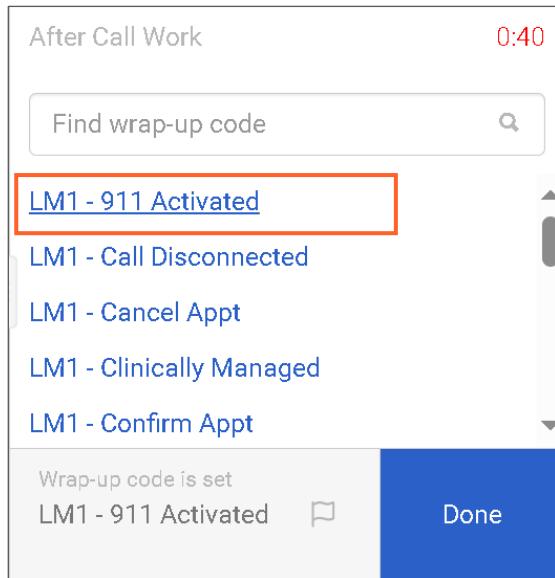
The Genesys interface shows the same call from Malone NY, but now with three participants: Paul Nichols, Malone NY, and Buffalo NY. The top bar and buttons are identical to the first step. The main screen displays a 'Conference (3)' section. It lists 'Provided contact data' for Paul Nichols and Malone NY, both with the phone number '+1 518-353-4157'. Below them is a search result for 'Searching for '+1 518-353-4157' which shows 'Buffalo NY +1 716 438-3393'. Each participant has a small profile icon and a 'call' and 'video' icon to their right.

When the dispatcher is on the line, provide a summary of the patient's emergency and request EMS to be sent to their location. Remain on the phone until EMS arrives to assist the patient.

*\*This workflow is continued on the next page.*

3

### Complete Call Disposition & Document Ubiquity



When the call ends, you will have 60 seconds to complete your call wrap-up report. Select the **LM1 – 911 Activated**.

- Create, complete, and finalize a note in Ubiquity to detail the interaction and transfer.
  - Follow guidelines in the [Call Documentation](#) section of this job aid.

This completes the workflow.

## Urgent Yellow Buzzwords List

Yellow Buzzwords are considered urgent; however, Landmark will attempt to assist these callers before the ER is recommended.

### Yellow Buzzwords

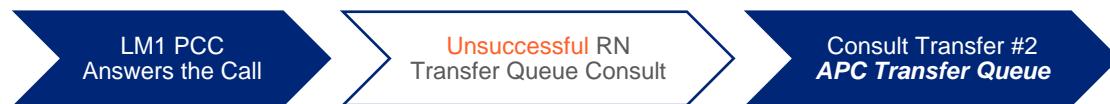
- Unconscious (*on Hospice*)
- Can't be Aroused (*on Hospice*)
- Sudden and Severe Pain
- New Severe or Worsening Breathing Difficulties
- New Chest Discomfort
- Difficulty Staying Awake
- Expects to Lose Consciousness
- Has Lost Consciousness but is Now Awake
- New Confusion
- Coughing or Vomiting Blood
- New and Sudden Dizziness or Vertigo (*room spinning*)
- Intoxication or Overdose
- Continuous / Uncontrolled Bleeding
- Heart Rate below 50 or Above 110
- Blood Pressure Below 90/60 or Above 180/120
- Oxygen/ Pulse Ox Below 90
- Blood Sugar Below 70 or Above 300
- Heart Pacemaker / Defibrillator Issue, Shock or Firing
- Left Ventricular Assist Device (LVAD) issue
- Recent Fall with Bodily and / or Head Injury
- Sudden change in or inability to:
  - Speak (slurred or ability to understand)
  - See (vision)
  - Move (stand, walk, paralysis, balance)
  - Feel (sensation, numbness)

## Yellow Buzzword Call Transfer Overview

### Consult Transfer Attempt #1



### Consult Transfer Attempt #2



### Consult Transfer Attempt #3

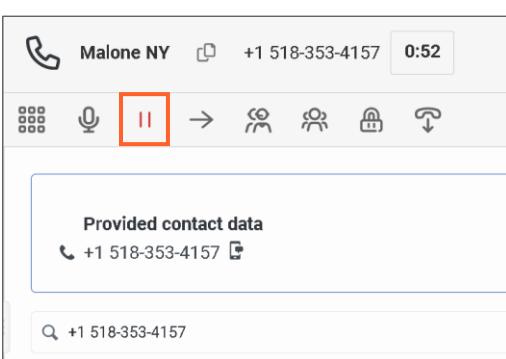


### Emergency Room (ER) Recommendation

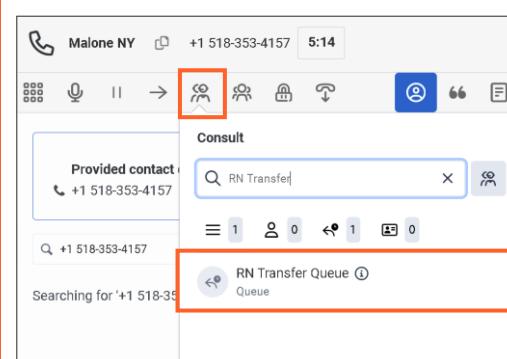


## Transfer Attempt #1 - LM1 Triage RN Consult Transfer

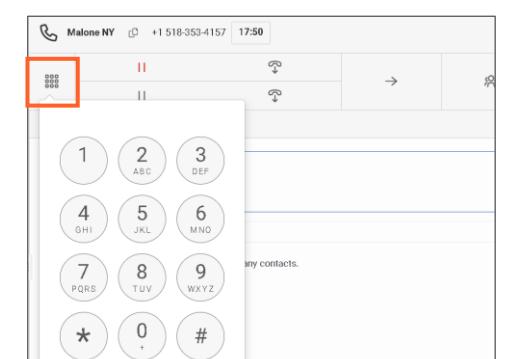
LM1 PCCs will respond to the use of a Buzzword first by attempting a consult transfer to the “**RN Transfer Queue**” in Genesys.

- 1**  
Place the Call on “Hold”  


Malone NY +1 518-353-4157 0:52  
Provided contact data +1 518-353-4157  
+1 518-353-4157

Obtain the caller's verbal consent to be placed on hold before completing the action in Genesys.
  - The hold button will light up in red when active.
- 2**  
Consult the “RN Transfer Queue”  


Malone NY +1 518-353-4157 5:14  
Provided contact +1 518-353-4157  
Q +1 518-353-4157  
Searching for '+1 518-353-4157' Queue

Use the “Consult” option in Genesys to search and select the **RN Transfer Queue**:
  - Wait times should not exceed 1-2 minutes.
  - If no answer, attempt a consult transfer to the **APC Transfer Queue** after checking on the patient.
- 3**  
Enter the 3-Digit Metro Escalation  


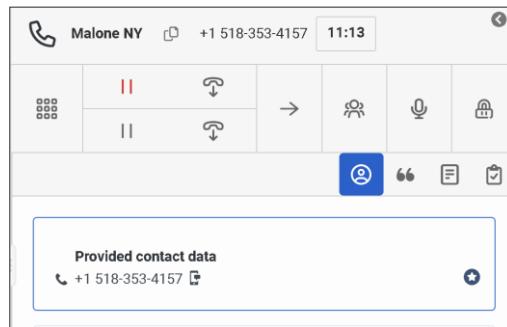
Malone NY +1 518-353-4157 17:50  
any contacts.  
1 2 ABC 3 DEF  
4 GHI 5 JKL 6 MNO  
7 PQRS 8 TUV 9 WXYZ  
\* 0 + #

Refer to the [Metros Summary](#) profile carts to determine the Escalation Extension that best matches the patient's metro listed in Ubiquity.
  - Use the Dial Pad option to enter the extension.
  - You may be asked to re-enter or confirm the extension.
  - Once confirmed, hold for an LM1 Clinician to respond.

\*This workflow is continued on the next page.

4

#### Follow Call Transfer Guidelines



Introduce yourself and your role to the LM1 Clinician and follow call transfer guidelines.

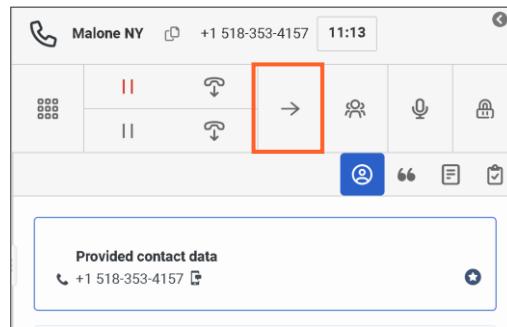
Refer to the [Company Resources & Employee Reference Job Aid](#) for details to provide the following:

- The caller's name.
- The caller's relationship to the patient, company, or agency.
- Caller's authorization status.
- Did the caller complete patient HIPAA verification?

The patient will remain on hold during this time.

5

#### Complete the Call Transfer



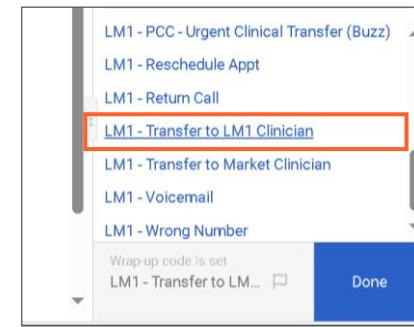
Briefly summarize the caller's question, concern, or reason for transfer.

- Allow the LM1 Clinician time to open the patient's chart.
- Select the "Transfer" button when the LM1 Clinician indicates they are ready to speak with the caller.

This will complete the transfer and end the call for the LM1 PCC.

6

#### Complete Call Disposition & Document Ubiquity



You will have 60 seconds to complete your call wrap-up report. Select the **LM1 – Transfer to LM1 Clinician** and click **Done**.

- Create, complete, and finalize a note in Ubiquity to detail the interaction and transfer.
  - Follow guidelines in the [Call Documentation](#) section of this job aid.

This completes the workflow.

## Transfer Attempt #2 - LM1 APC Consult Transfer

If a Buzzword is used during a call, but no LM1 Triage RNs respond to the first transfer attempt, LM1 PCCs will attempt a consult transfer to the “**APC Transfer Queue**” in Genesys.

**1 Place the Call on “Hold”**

Malone NY +1 518-353-4157 0:52

Provided contact data +1 518-353-4157

Obtain the caller's verbal consent to be placed on hold before completing the action in Genesys.

- The hold button will light up in red when active.

**Suggested Script**

*“Thank you for your patience, I am still attempting to contact a clinician on your behalf, are you feeling any worse than you were before?”*

**2 Consult the “APC Transfer Queue”**

Malone NY +1 518-353-4157 0:28

Consult

Provided contact +1 518-353-4157

Searching for '+1 518-353-4157' APC Transfer Queue

Use the “Consult” option in Genesys to search and select the **APC Transfer Queue**:

- Wait times should not exceed 1-2 minutes.
- If not answered within 1-2 minutes, attempt a consult transfer to the On-Call Provider.
  - Check on the patient's condition between all transfer attempts.

**3 Enter the 3-Digit Metro Escalation**

Malone NY +1 518-353-4157 17:50

Any contacts.

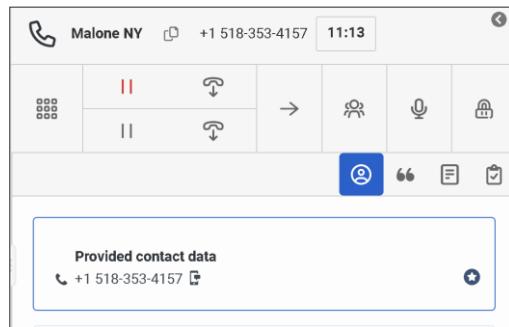
Refer to the [Metros Summary](#) profile carts to determine the Escalation Extension that best matches the patient's metro listed in Ubiquity.

- Use the Dial Pad option to enter the extension.
- You may be asked to re-enter or confirm the extension.
- Once confirmed, hold for an LM1 Clinician to respond.

\*This workflow is continued on the next page.

4

#### Follow Call Transfer Guidelines



Introduce yourself and your role to the LM1 APC and follow call transfer guidelines.

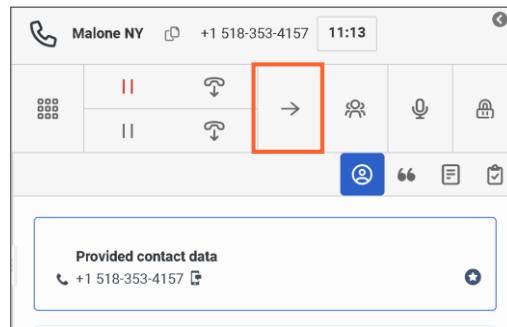
Refer to the [Company Resources & Employee Reference Job Aid](#) for details to provide the following:

- The caller's name.
- The caller's relationship to the patient, company, or agency.
- Caller's authorization status.
- Did the caller complete patient HIPAA verification?

The patient will remain on hold during this time.

5

#### Complete the Call Transfer



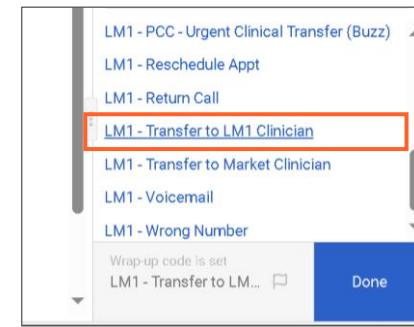
Briefly summarize the caller's question, concern, or reason for transfer.

- Allow the LM1 APC time to open the patient's chart.
- Select the "Transfer" button when the LM1 Clinician indicates they are ready to speak with the caller.

This will complete the transfer and end the call for the LM1 PCC.

6

#### Complete Call Disposition & Document Ubiquity



You will have 60 seconds to complete your call wrap-up report. Select the **LM1 – Transfer to LM1 Clinician** and click **Done**.

- Create, complete, and finalize a note in Ubiquity to detail the interaction and transfer.
  - Follow guidelines in the [Call Documentation](#) section of this job aid.

This completes the workflow.

## Transfer Attempt #3 - On-Call Provider Consult Transfer

If there are no LM1 Triage RNs or LM1 APCs available to respond to a Buzzword, attempt a consult transfer to the On-Call Provider listed in the [Humanity](#) web application:

- On-Call Provider coverage schedules can be found under the “**Shift / Planning (Legacy)**” tab.
  - Schedule range should be set to the “Day” view.
  - Ensure the selected date on the calendar is current.
  - Select the drop-down arrow beside a Metro’s name to open the provider coverage list by type.
  - Schedules may be viewed by position, by staff, or as a list using the buttons to the upper-right of the window.

The screenshot shows the ShiftPlanning Legacy interface. At the top, there's a navigation bar with icons for Dashboard, ShiftPlanning, Leave, Training, Staff, Availability, Reports, and ShiftPlanning (which is highlighted). Below the navigation bar is a header with "ShiftPlanning", "Day" (selected), "Week", "Month", "Schedule Range" (with arrows pointing to the date calendar), and "Acknowledge shifts". To the right of the date calendar is a "Schedule View Options" button with three icons. The main area features a calendar for December 2024. A red arrow labeled "Date Selection" points to the date "31" in the calendar. Another red arrow labeled "Metro Selection" points to a dropdown menu on the left containing options: "AL - Alabama", "AR - Arkansas", and "AZ - Phoenix".

## On-Call Provider Selection

With a metro's coverage listings expanded, LM1 PCCs may select the #1 Daytime, #1 Provider, or #2 Backup Physician on-call staff to view their shifts.

- Check the patient's on-call coverage information in the HPSI tab to determine POD / Zone coverage specifications.
  - Typically, #1 Daytime Clinicians provide coverage for the entire metro while on shift.
  - Provider's offering coverage after business hours may focus their coverage to smaller PODs or Zones depending on the size of the market.
- Contact the On-Call Provider who is on shift at the current time.

LM1 PCCs should **NEVER** consult UE / UV contacts listed in Humanity.

**Example:** If an On-Call Provider is needed to accept a call transfer at 6:30 PM (your time), consult the HPSI tab to obtain specific POD and Zone information before matching it to current coverage in Humanity.

The screenshot shows two windows side-by-side. On the left is the 'Health Plan Specific Information Notes' window, which displays the following information:

- State:** Alabama
- Humanity:** Alabama
- NO UE COVERAGE**
- OnCall Provider:** Montgomery/Huntsville/Dothan

An orange box highlights the 'OnCall Provider' field, and an orange arrow points from this field to the ShiftPlanning calendar window on the right.

The ShiftPlanning window shows the following details:

- ShiftPlanning** tab is selected.
- Date:** Dec 2024
- Day View:** Tuesday, December 31, 2024
- Schedule Search:** 12/31/2024 - 12/31/2024
- Shifts for 12/31/2024 - Tuesday:**
  - #2 Physician - Alabama (9:00am - 10:00pm)
  - #1 Daytime Physician (9:00am - 6:00pm)
  - #1 Provider - Montgomery/Huntsville/Dothan (6:00pm - 10:00pm)** (This shift is highlighted with a red box.)
  - #1 Provider - Birmingham (6:00pm - 10:00pm)
  - #1 Provider - Mobile (6:00pm - 10:00pm)
- Filter:** AL - Alabama
- Shift Types:** #1 Daytime Physi., #1 Provider - Bi.., #1 Provider - Mo.., #1 Provider - Mo.., #2 Physician - A.., #2 Physician - B.., Huddle Coverge

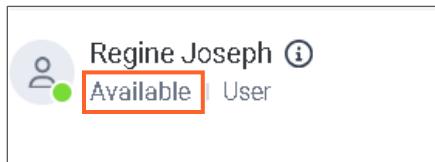
## Genesys Transfer Guidelines

When searching for an On Call Provider in Genesys, ensure that your address book is set to the “All Contacts” tab. If selected, search results should display two contact options; the provider’s Genesys user account, and a backup cellphone contact.

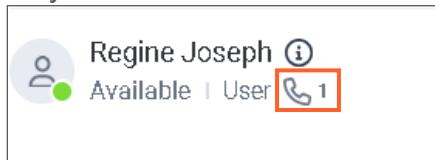
- If “**Available**”, always attempt to call the provider.
- If “**Busy**” or in a call, move to the next step in the call transfer workflow.
- If “**Away**” or “**Offline**”, attempt to contact their backup cellphone number.

## Genesys Status Indications

- Genesys account contacts will display the user’s status to indicate if they are “**Available**” for a phone call.



- Genesys users should not be called if “**Busy**” or “**Offline**”.
- Users may be listed as “**Available**”, but display a phone icon beside their status. This indicates that they are in a call and should **NOT** be contacted:

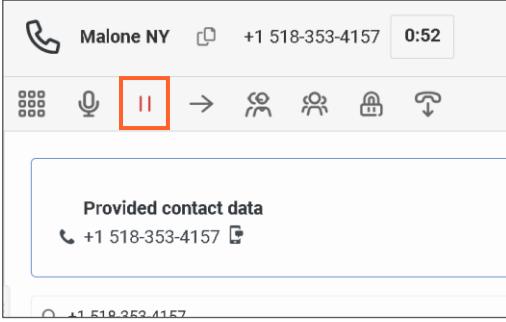


A screenshot of the Genesys interface. At the top, it shows "Malone NY" and a phone number "+1 518-353-4157" with a timestamp "3:41". Below this is a toolbar with various icons. The main area is titled "Consult" and contains a search bar with "Joseph Re" and a magnifying glass icon. Below the search bar, it says "Provided contact" and shows a phone number "+1 518-353-4157". There is also a button for "All Contacts Tab". Further down, it shows a list of results: "Joseph, Regine" (info icon) from "Humanity Directory | External Contact" and "Regine Joseph" (info icon) from "Available | User". Two orange arrows point to the "Regine Joseph" entries, labeled "Genesys User Account". Another orange arrow points to the "All Contacts Tab" button.

## On-Call Provider Call Transfer Workflow

**1**

Place the Call on "Hold"



Malone NY +1 518-353-4157 0:52

Provided contact data  
+1 518-353-4157

Obtain the caller's verbal consent to be placed on hold before completing the action in Genesys.

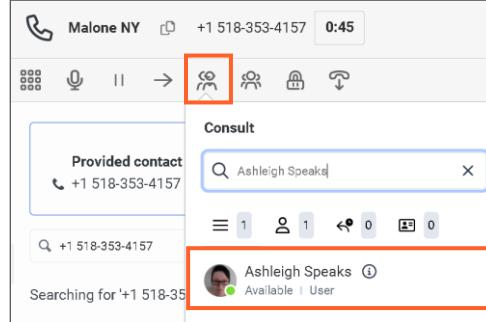
- The hold button will light up in red when active.

### Suggested Script

*"I apologize for the wait, but I am still attempting to contact one of our providers. Have your symptoms changed at all?"*

**2**

Consult the On-Call Provider



Malone NY +1 518-353-4157 0:45

Provided contact +1 518-353-4157

Consult

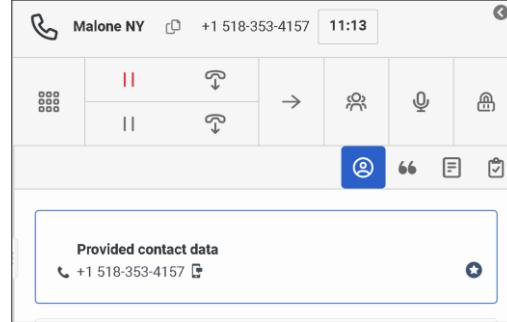
Ashleigh Speaks Available | User

Use the "Consult" option in Genesys. Search and select the On-Call Provider for transfer.

- Wait times should not exceed 1-2 minutes.
- If not answered within 1-2 minutes, attempt a consult transfer to the On-Call Provider.
  - Check on the patient's condition between all transfer attempts.

**3**

Follow Call Transfer Guidelines



Malone NY +1 518-353-4157 11:13

II → Ashleigh Speaks Available | User

Provided contact data  
+1 518-353-4157

Introduce yourself and your role to the On-Call Provider and complete steps to transfer the call. Provide the following prior to transfer:

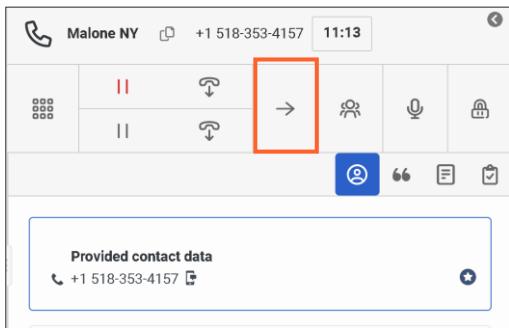
- The caller's name.
- The caller's relationship to the patient, company, or agency.
- Caller's authorization status.
- Did the caller complete patient HIPAA verification?

The patient will remain on hold during this time.

**\*This workflow is continued on the next page.**

4

#### Complete the Call Transfer



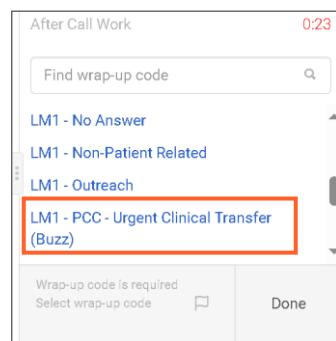
Briefly summarize the caller's question, concern, or reason for transfer.

- Allow the On-Call Provider time to open the patient's chart.
- Select the "Transfer" button when the On-Call Provider indicates they are ready to speak with the caller.

This will complete the transfer and end the call for the LM1 PCC.

5

#### Complete Call Disposition & Document Ubiquity



You will have 60 seconds to complete your call wrap-up report. Select the ***LM1 – PCC Urgent Clinical Transfer (Buzz)***.

- Create, complete, and finalize a note in Ubiquity to detail the interaction and transfer.
  - Follow guidelines in the [Call Documentation](#) section of this job aid.

This completes the workflow.

## LM1 Clinician Shortage Conditions

LM1 PCCs will be notified in Teams if there is a shortage of LM1 Clinicians licensed for a specific state / metro. Please refer to the call transfer workflows below for alternate coverage.

- These coverage shortages are metro or state specific and do not apply to all calls at a national level.

### LM1 Triage RN Shortage

If there are no Triage RN's on shift to respond to call transfers, LM1 PCCs should make their first transfer attempt to the **LM1 APC Transfer Queue** before seeking coverage options in **Humanity**.

- Some metros do not offer #3 or #4 coverage options in Humanity.
  - For these Metros, LM1 PCCs should recommend that the patient visit the Emergency Room (ER) after unsuccessful transfers to #1 or #2 coverage options.



### LM1 APC Shortage

When a specific metro or state experiences an LM1 APC coverage shortage, attempt to reach an **LM1 Triage RN** before checking coverage options in **Humanity**.



## Patient Refuses EMS Workflow

For various reasons, patients may refuse to go to the emergency room or contact EMS for assistance. It is important to respect the decisions of our patients and inform them of next-steps and follow-up:

1

### Inform Caller of Follow-Up Timeframe

Inform the caller that there are no clinicians currently available to assist them and recommend that they visit the emergency room to receive immediate care.

If the patient refuses EMS contact and the emergency room, send a callback request to a LM1 Triage Mailbox on their behalf.

- Inform the caller that it could take up to 24 hours to receive a callback.

2

### Send a Callback Request to a LM1 Triage Mailbox

Use the [Metros Summary](#) to locate the “Triage Callback” mailbox associated with the patient’s metro. Send a callback request to that mailbox with the following included:

- Subject – Patient’s Name, (ID Number), Metro
- Patient’s First Initial + Last Name
- A callback number for follow-up

#### Suggested Script – Recommend EMS / ER to the Caller

*“Unfortunately, we have no clinicians available to help you right now. Based on what you described, we would consider this an urgent situation and recommend that you visit the emergency room. I can also contact emergency medical services on your behalf.”*

#### Suggested Script – Next Steps & Follow-Up Information

*“I want to make sure that our team is aware of your situation. I am sending a callback request to our clinicians on your behalf, but it may take up to 24 hours for them to follow-up with you.”*

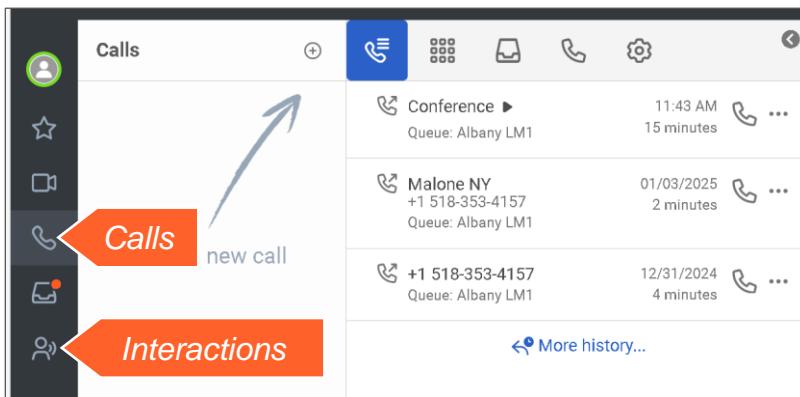
 Send	From <input type="button" value="▼"/> paul.nichols@optum.com
	To <input type="text" value="hartfordtriage@landmark.pure.cloud;"/>
	Cc <input type="text"/>
	Subject John Kent (0000000) Hartford
Patient's Name:	J. Kent
Callback Number:	(620) 314-2214

## Patient Unresponsive or Call Disconnection Workflow

In the event a patient loses consciousness or the call disconnects during an urgent situation:

1

### First Attempt: Re-Dial the Caller

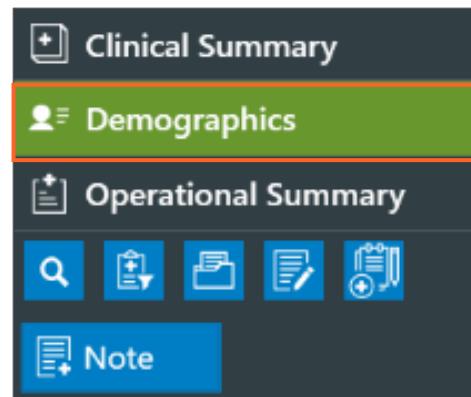


The “Calls” tab in Genesys may be used as a backup to view recent incoming call phone numbers.

- If provided during the initial call, LM1 PCCs should first try the callback number recorded in their documentation.
- All calls should be made using the “Interactions” tab.

2

### Attempt #2 – Contact an Authorized Contact



If your first callback attempt is unsuccessful, check the “Demographics” section of the patient’s chart and use Genesys to call an authorized contact, if listed.

- Introduce yourself, your job title, and the organization.
- Verify who you are speaking with.
- Prove the authorized contact a summary of the urgent situation and discuss next steps.

## Suicidal Patient Guidelines

Please refer to these general guidelines when managing suicidal patient calls:

- Please note the 24 / 7 suicidal hotline phone number: (800) 273-8255
  - This is a resource we can provide our patients once immediate concerns are resolved.

What to do:	What NOT to do:
Take the threat seriously.	Joke.
Ask about immediate safety.	Judge.
Ask about plan and means.	Overreact.
Only transfer the caller when it is safe.	Minimize feelings.
Maintain active listening.	Downplay seriousness.
Respond with empathy.	Make empty promises.
Keep your voice calm.	Say "It's going to be OK".
Express support & concern.	Force a cheerful voice.
Ask how you can help.	Get into philosophical debates.
Be patient.	Share a personal story as a form of empathy.

Remember that our patients suffer from multiple chronic conditions, they may often be suffering in their daily lives, or experience end-of-life events. Lead these calls with kindness and compassion and withhold judgment about the patient's mindset.

## Immediate Intent Response Workflow

Follow this workflow if the patient expresses plans, strategies, or immediate intent to commit suicide:

1	2	3
<p><b>Remain on the Phone</b></p> <p>Stay calm and keep the patient talking. Allow them time to vent or otherwise express themselves.</p> <ul style="list-style-type: none"><li>• <b>Do NOT</b> interrupt the caller.</li><li>• Be patient.</li><li>• Offer responses that demonstrate active listening.</li></ul> <p>If the call disconnects, proceed with the <b>Patient Unresponsive or Call Disconnection Workflow</b></p>	<p><b>Alert Your Supervisor in Teams</b></p> <p>Post an <b>IMPORTANT!</b> Message in the <b>LM1 PCC Teams</b> channel to alert your Supervisor to the urgent situation.</p> <ul style="list-style-type: none"><li>• Your Supervisor will contact EMS in the background while you stay on the phone with the patient.</li><li>• Updates will be shared via Teams chat.</li></ul>	<p><b>Wait for EMS Arrival</b></p> <p>Stay on the phone with the patient until emergency services arrive:</p> <ul style="list-style-type: none"><li>• Confirm EMS arrival in a Teams chat for your Supervisor.</li><li>• Only end the call when it is safe to do so.</li></ul>

### Suggested Teams Message

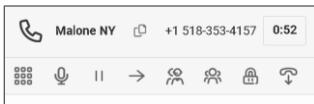
*“Suicidal patient calling.  
Patient ID = (insert patient ID)  
Immediate Intent”*

## Suicidal Feelings Without Immediate Intent Response Workflow

Use this workflow if the patient is contemplating suicide as a possibility, but expresses no immediate intent or plan:

1

### Remain on the Phone



Stay calm and keep the patient talking. Allow them time to vent or otherwise express themselves.

- **Do NOT** interrupt the caller.
- Be patient.
- Offer responses that demonstrate active listening.

If the call disconnects, proceed with the **Patient Unresponsive or Call Disconnection Workflow**

2

### Alert a Clinician in Teams



Post an **IMPORTANT!** Message in the **LM1 Full APC, RN, & PCC** Team's General channel to alert a clinician to the urgent situation.

- A clinician will respond if they are able to take the call.
- The clinician will go **Available** in Genesys to prepare for your conference call.

3

### Conference Call in Genesys



Using the **Conference** feature in Genesys, search and select the clinician who responded to your Teams message.

- Selecting their name will initiate the Conference Call.
- Introduce the clinician and the patient.
- Remain in the call, on mute, for the remainder of the conversation.

#### Suggested Teams Message

*"Patient having suicidal feelings.  
Patient ID = (insert patient ID)  
Request LM1 Clinician assistance  
in a Conference call."*

#### Suggested Script

*"Thank you for speaking with me  
and trusting me with this  
information. I've found a clinician  
who can take this conversation  
further and provide you with some  
additional resources. Is that OK?"*

## Metro Provider Request for EMS Workflow

There may be occasions when metro providers must contact EMS while assisting patients during visits. They may call the LM1 PCC line to identify the local EMS phone number using NENA. The LM1 PCC may then offer to contact EMS on the patient's behalf and include the provider in a conference call with the dispatcher.

1

### Obtain Patient Details

The screenshot shows a form with fields for First Name, Last Name, Date of Birth (M/D/YYYY), and Health Plan ID. There are also buttons for Expanded Search, Search, and Clear.

The metro provider and LM1 PCC will introduce themselves. The metro provider will then state the need for EMS contact.

- The LM1 PCC will request the patient's name and DOB to search in Ubiquity.

2

### Verify Patient's Address



The LM1 PCC will check the patient's address in the **Demographics** section of the chart.

- The metro provider will confirm the patient's address and current location.

3

### EMS Phone Number Lookup



The LM1 PCC will use the **NENA 911** database to search, and identify, the EMS phone number for the patient's location.

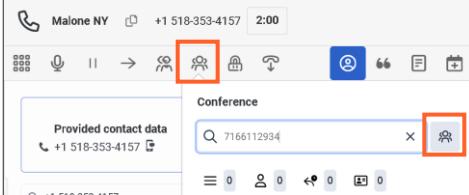
- The LM1 PCC will provide the phone number to the metro provider.
- The LM1 PCC will offer to conference call EMS dispatch.

## Metro Provider & EMS Conference Call in Genesys

Follow this workflow if the metro provider accepts your offer to start a conference call with the EMS dispatcher:

**1**

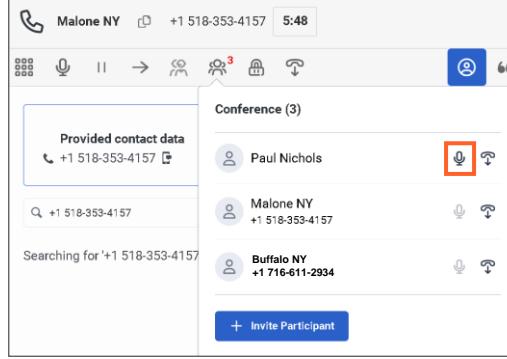
### Initiate a Conference Call



From the dashboard, use the **Conference** option to enter the EMS phone number. Select the Conference button beside the text entry field to begin the call.

**2**

### Remain Muted on the Phone



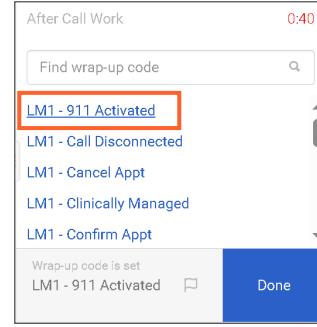
Once the conference call starts, mute yourself and allow the metro provider to communicate with the dispatcher.

- Do NOT end the call until EMS has arrived at the patient's location.

Ending the call will stop the conference communication for all participants.

**5**

### Complete Call Disposition & Document Ubiquity



You will have 60 seconds to complete your call wrap-up report. Select the **LM1 – 911 Activated**.

- Create, complete, and finalize a note in Ubiquity to detail the interaction and transfer.
  - Follow guidelines in the [Call Documentation](#) section of this job aid.

This completes the workflow.

## Medstar & Acadian Requests Workflows

In our Texas metros, we work with two additional EMS providers:

- Medstar
- Acadian

These EMS services may contact us for dispatch or provider oversight during an urgent visit.



### Oversight Providers

Oversight provider coverage is listed in Humanity under our Texas metro listings.

Humanity – Medstar & Acadian in North Central Texas		Example: Medstar / Acadian Coverage in the “List” Schedule View	
<input type="checkbox"/> TX - North Centr.. ▲		01/07/2025 - 01/07/2025	
<input type="checkbox"/> #1 Daytime Triag..		01/07/2025 - Tuesday	
<input type="checkbox"/>	#1 Provider Dall..	<b>Acadian EMS DFW/Temple - OnCall Physician</b> 8:00am - 12:00am (01/08/2025)	Alan Chiu, MD
<input type="checkbox"/>	#1 Temple TX - P..	<b>MedStar DFW - Physician OnCall</b> 8:00am - 12:00am (01/08/2025)	TX - North Central Texas (DFW & Temple)
<input type="checkbox"/>	#3 Physician OnC..	<b>Acadian EMS DFW/..</b>	Alan Chiu, MD
<input type="checkbox"/>	Acadian EMS DFW/..	<b>MedStar DFW - Ph..</b>	TX - North Central Texas (DFW & Temple)
<input type="checkbox"/>	MedStar DFW - Ph..		
<input type="checkbox"/>	Telephonic ONLY ..		

## Staff Search in Humanity

The “**Staff**” tab can be used to locate a provider’s contact information:

- Select the “**All Staff**” category prior to searching for a provider.

The screenshot shows the tcpc Humanity software interface. At the top, there is a green header bar with the tcpc logo and the word "Humanity". Below the header, there are several icons: a map (with a red notification bubble), a grid, a rocket, a graduation cap, and a person icon (which is highlighted with a red box). The main area is titled "Staff". On the left, there is a sidebar with two options: "All Staff (1540)" (highlighted with a red box) and "Staff with Same Position (58)". In the center, there is a search bar labeled "Search by Name" with a magnifying glass icon, followed by a "Filter by" dropdown menu set to "Locations/Positions".

## Humanity: Medstar & Acadian in North Central Texas

The screenshot shows a provider profile for Alan Chiu, MD. At the top, there is a placeholder profile picture, the name "Alan Chiu, MD", the title "Scheduler", and a "Ping" button. Below this, there is a section titled "Employee Details" containing the following information:  
Full Name: Alan Chiu, MD  
Username: achiu2  
Mobile: 469-984-4220

Select the provider’s name from the search results to view their profile:

- The provider’s mobile number will be listed.

## Call from Dispatch

If an Acadian or Medstar dispatcher calls to request contact details for the Oversight Physician:

1	2	3
<p><b>Obtain Patient Details in Ubiquity</b></p> <p>Use the patient's name &amp; DOB to open their chart in <b>Ubiquity</b>.</p> <ul style="list-style-type: none"><li>• If the dispatcher does not know the patient's DOB, ask for the patient's address and compare to metro information in Humanity.</li></ul>	<p><b>Find Coverage in Humanity</b></p> <p>Locate the Medstar or Acadian provider in <b>Humanity</b>.</p> <ul style="list-style-type: none"><li>• Use the <b>Staff</b> tab to search the provider and open their profile.</li><li>• Locate the provider's mobile number.</li></ul>	<p><b>Provide Mobile Contact Information</b></p> <p>Give the Medstar or Acadian oversight physician's name and mobile number to the dispatcher.</p> <ul style="list-style-type: none"><li>• Offer to transfer the dispatcher to the oversight physician and complete, if accepted.</li></ul>

## Call from Onsite Provider

If an Acadian or Medstar on-site provider calls during a home visit and requests to speak with the Oversight Physician:

1	2	3
<p><b>Obtain Patient Details in Ubiquity</b></p> <p>Use the patient's name &amp; DOB to open their chart in <b>Ubiquity</b>.</p> <ul style="list-style-type: none"><li>• If the provider does not know the patient's DOB, ask for the patient's address and compare to Humanity metro listings.</li></ul>	<p><b>Find Coverage in Humanity</b></p> <p>Locate the Medstar or Acadian provider in <b>Humanity</b>.</p> <ul style="list-style-type: none"><li>• Use the <b>Staff</b> tab to search the provider and open their profile.</li><li>• Locate the provider's mobile number.</li></ul>	<p><b>Consult the Oversight Physician</b></p> <p>Complete a consult transfer to the Medstar or Acadian oversight physician.</p> <ul style="list-style-type: none"><li>• If no answer, consult the <b>#3 Backup Clinician On-Call</b> or <b>#4 Backup Physician On-Call</b>.</li></ul>

# Call Documentation

## Table of Contents

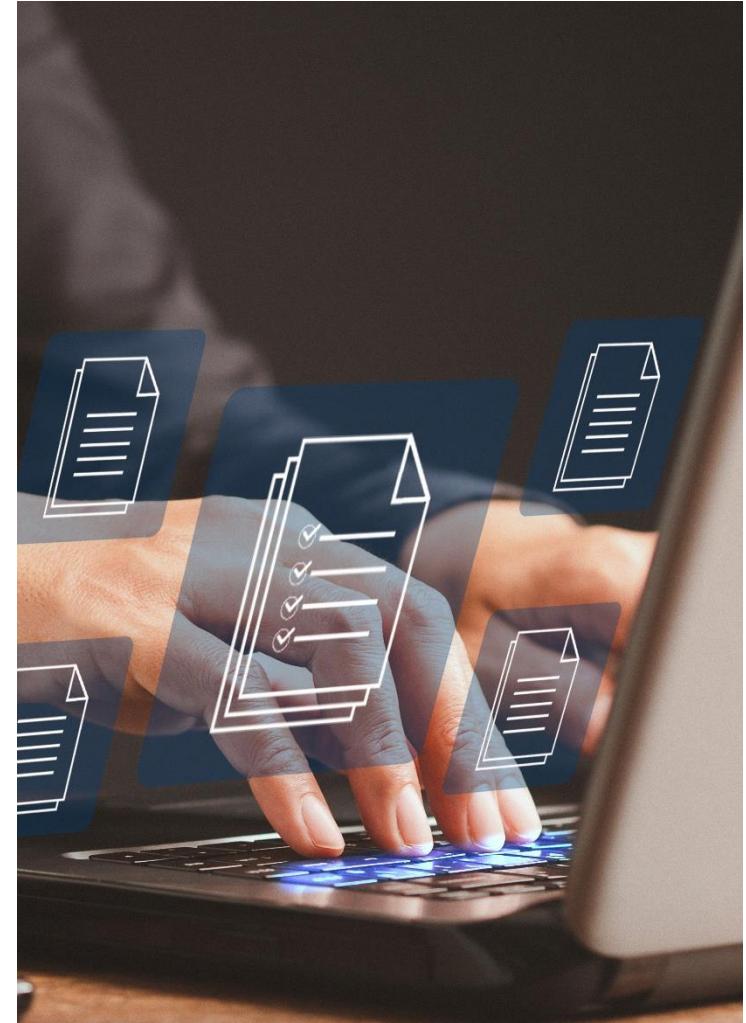
- [Ubiquity Note Entry Tutorial](#)
- [Call Documentation General Guidelines](#)
- [Ubiquity Note Documentation Templates & Examples](#)
- [Call Documentation During Network Interruptions](#)

### **Expectations & Compliance**

A Ubiquity Note **MUST** be documented for **EVERY** incoming or outgoing call or answering service message on behalf of patient care, general updates, and administration.

Barring network issues, failing to document an interaction may result in disciplinary action up to, and including, termination.

The quality and compliance of call documentation is conserved in LM1 PCC call audits and reflected on the LM1 PCC Call Audit Scorecard.



## Ubiquity Note Entry Tutorial

1. While in the patient's chart, select the "Note" button to begin.
2. Add Category, Sub-Category, and Supplemental note information:
  - o **Category** = Landmark First – Patient Call
  - o **Sub Category** = Administrative
3. Check the **Phone Call** option under the **Supplementary** menu.
4. Click **Start** to proceed.



This screenshot shows the 'Patient Update-(6/11/2024)' window with the 'Note Details' tab selected. On the left, there are fields for 'Note Date' (set to 6/11/2024 5:24 PM) and 'Category' (set to 'Landmark First – Pati...'). Below that is a dropdown for 'Sub Category' set to 'Administrative'. On the right, the 'Select Forms' dialog is open. Under the 'Core' section, 'Case Note' is checked. In the 'Supplementary' section, several checkboxes are available, and 'Phone Call' is checked and highlighted with a red box. At the bottom of the dialog are buttons for 'Save & Close' and 'Start', with 'Start' also highlighted with a red box.

5. In the text field provided, enter the LM1 PCC note template Hash Key:
  - Type "#lm1pcc" and select the matching pop-up when it appears.
6. Populate your note template with details about the interaction.
7. Check **Content Type** and **Note Type** information that applies:
  - Always check **Calls Completed**.
  - If the patient's identity was successfully verified during the call according to the [3 Patient Identifier Verification Procedure](#), check **Patient identity verified as per policy**.
8. When finished, click "**Save and Close**".

**Case Note**

#LM1PCC

Patient identity verified as per policy    Patient Notified of a Recorded Line

**Did any of the following apply to this note?**

**Contact Type**

Patient    Family/friend  
 Community Provider - PCP or Specialist    Community Provider - Other  
 Facility (IP, LTC, SNF)    Health plan  
 Landmark Provider    Landmark IDT  
 Community Pharmacy    Landmark Link Call

**Urgent Management**

Patient referred to ER    Patient direct admitted to SNF/SAR  
 Landmark First Only: Provider dispatched    Medications prescribed

Max character limit is 5,000.

< Prev   Next >   Discard Changes   Close   **Save & Close**   Save

- Once filled in and completed, all LM1 PCC notes should be **Finalized**.
  - Finalizing a note is like signing your name in attestation of the documentation's input and accuracy.
  - If not finalized, the note will be considered **Open**.
  - Open notes will prevent others from documenting their interactions with the patient for a set period of time.

To finalize your note, select the **Open** drop-down box and select **Finalized Documentation**.

Patient Aspen Wright	Staff Paul Nichols	Note Date (current date)	Category Landmark First – Patient Call	Sub Category Administrative	<div style="border: 1px solid #ccc; padding: 2px;">Note Status</div> <div style="display: flex; justify-content: space-around;"> <span>Open</span> <span>Update</span> </div> <div style="background-color: #f0f0f0; padding: 2px; margin-top: 5px;">Open</div> <div style="border: 2px solid red; padding: 2px; margin-top: 5px;">Finalized Documentation</div>
<b>Case Note</b> Caller's Name: Caller's Relationship to Patient:					<div style="border: 1px solid #ccc; padding: 2px; margin-top: 10px;">Outstanding Mandatory Tasks 0</div>

- Click "Update" to complete the finalization process.

Patient Aspen Wright	Staff Paul Nichols	Note Date (current date)	Category Landmark First – Patient Call	Sub Category Administrative	<div style="border: 1px solid #ccc; padding: 2px; margin-top: 10px;">Note Status</div> <div style="display: flex; justify-content: space-between;"> <span>Finalized Documentation</span> <span>Update</span> </div> <div style="color: red; font-size: small; margin-top: 5px;">I, Paul Nichols have electronically signed this note on 4/9/2024 10:09 AM Eastern Standard Time</div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 10px;">Outstanding Mandatory Tasks 0</div>
<b>Case Note</b> <b>Case Note</b> Caller's Name: Caller's Relationship to Patient: Patient Full Name: Patient Date of Birth: Patient Address: Caller's Authorized Contact Status:					<div style="border: 1px solid #ccc; padding: 2px; margin-top: 10px;">Jump To</div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 5px;"> Case Note</div>

The note is now correctly entered into Ubiquity.

## Call Documentation General Guidelines

Your note should focus on the caller's request, patient care, symptoms, and any actions taken to manage the call.

### What to Include

Please include the following information in your documentation (if applicable):

- ✓ The name and title of the provider who accepted your call handoff.
- ✓ Include a confirmation of any updates you made to the patient's contact information under the "Action Taken" heading.
- ✓ Indicate if you obtained valid verbal consent for a caller.
- ✓ The type and date of any appointment with cancellation / reschedule requests.
- ✓ If contacted by an external medical facility, please include the name of that facility beside the caller's name.
- ✓ If a call was disconnected, was a redial attempted? This should be indicated in your "Action Taken" section.
- ✓ The results of a health screening, if applicable.
- ✓ Emails, Teams messages, and other communications conducted on the caller's behalf.
- ✓ If no answer, did you leave a voicemail?

### Proofreading

The notes in a patient's chart create a call, care, and interaction history for the patient. We, along with our co-workers in local metro offices, rely on these notes to be accurate and clear. Please proofread your notes before finalization.

### What **NOT** to Include

- "No Answer" statements regarding provider availability.
- Statements categorizing the patient as rude, moody, or angry.
- Any reference to complaints submitted on the caller's behalf.
- Failed call transfer attempts.

## Ubiquity Note Documentation Templates & Examples

Use the **lm1pcc** Hash Key to open the most current note template in Ubiquity:

### Formatting

Notes should be typed in:

- Font = Calibri
- Text Size = 10pt

### General Information Entry

Enter the caller's name, relationship to patient, the patient's full name, patient's date of birth, callback number, & patient's address as accurately as possible.

- If the caller identifies as a representative from an insurance company, community provider, or other organization, include this information in ***Relationship to Patient***.

### Caller Authorized Contact Status

Enter "Yes", "No", or "Valid Verbal Consent Obtained" to indicate the caller's authorization status.

### Appointment Cancellations Requests & Reschedules

Indicate whether the caller requested to cancel an appointment, the appointment's type, and the date of the original appointment. Also indicate if you rescheduled the appointment, and the date of the updated visit.

### LM1 PCC Ubiquity Note Template

Caller's Name:

Caller's Relationship to Patient:

Patient Full Name:

Patient Date of Birth:

Patient Address:

Caller's Authorized Contact Status:

Callback Number:

Did the caller request to cancel an appointment?

If yes, did you offer to reschedule the appointment (if within PCC scope)?

Reason for Call:

Action taken:

### Reason for Call

Briefly, but accurately, summarize the caller's request. This section should be no longer than a short paragraph (2-4 sentences).

Include any symptoms, medical questions, service requests, general questions, or organization-specific information requests.

## Action Taken

This section should include any actions that the LM1 PCC took to resolve the caller's question or concern including successful call transfers, follow-up or callback email requests, successful appointment cancellations or reschedules, or voicemails left.

Depending on the call's management and follow-up, there are specific **Action Taken** entries that **MUST** be entered.

Follow-Up	Action Required Entry
<b>LM1 Clinician Transfer</b>	Transferred to (clinician's name), (clinician's title)
<b>Sent Triage Callback Request Email</b>	Caller is agreeable to a call back. Sent an email to LM1 Clinical Triage inbox for a clinician to return patient's call.
<b>Callback – Resolved</b>	Callback received – Called (caller's name) back at (caller's phone number), spoke with (caller) to (describe request resolution).
<b>Callback – No Answer</b>	Callback received – Attempted callback at (phone number), no answer, left voicemail.
<b>Escalations / Complaints</b>	Escalated ( <i>include no details about the complaint in this section</i> )
<b>Metro Care Coordinator (CC) Follow-Up Request</b>	Action Required (CCs will review your "Reason for Call" section for details)
<b>Transition or Non-Eligible Patient</b>	Caller referred to the health plan. Transfer offered and (completed / declined)

## Answering Service Documentation

The LM1PCC Hash Key template is **NOT** necessary to use when documenting answering service interactions. Instead, copy the answering service email, and your reply, into the text field of your Ubiquity note.

### Example: Answering Service Documentation

Administrative – Complete – (your first and last name)  
(paste answering service message here)

Answering Message	Message Reply / Documentation
<b>Administrative</b> (LM1 PCC scope)	Administrative – Complete – (your first & last name)
<b>Administrative</b> (metro CC follow-up required)	Administrative – Action Required – (your first & last name)
<b>Clinical Request / Concern</b>	Administrative – Sent to Triage – (your first & last name)
<b>Medication Refill Request</b>	Administrative – Sent to LM1 APC Escalation – (your first & last name)

## Triage Callback Request & APC Escalation Emails

Emails to a Triage Callback mailbox or APC Escalation mailbox are sent from Outlook to Genesys where they are received by our clinicians.

Because of this, Outlook considers this email to be external and will block messages that contain too much PHI. These emails must be simplified to only include:

- **Subject** – Patient Name, ID, Metro
- **Body** – Patient First Initial & Last Name, Callback Number

### Example: Triage Callback or APC Escalation Email

The screenshot shows an Outlook email interface. The 'From' field contains 'paul.nichols@optum.com'. The 'To' field contains a link 'hartfordtriage@landmark.pure.cloud;'. The 'Cc' field is empty. The 'Subject' field contains 'John Kent (0000000) Hartford'. The message body contains two lines of text: 'Patient's Name: J. Kent' and 'Callback Number: (620) 314-2214'.

## Care Team and Call Center Market Mailbox Emails

Emails to the Care Team and Market mailboxes should include your Ubiquity Note in the body of the email.

- **Subject** – Patient Name, ID, Metro
- **Body** – Copy / paste your Ubiquity Note

### Example: Care Team & Market Email

The screenshot shows an Outlook email interface. The 'From' field contains 'paul.nichols@optum.com'. The 'To' field contains a link 'Call Center Virginia;'. The 'Cc' field contains '(add care team members here)'. The 'Subject' field contains 'Denice Wheeler, 0000000, Virginia'. The message body contains several lines of call information: 'Caller's Name: Denice Wheeler', 'Caller's Relationship to Patient: self', 'Patient Full Name: Denice Wheeler', 'Patient Date of Birth: 7/21/1960', 'Patient Address: 283 W. Main Street, Quiet Valley, VA 24658', 'Caller's Authorized Contact Status: Authorized', 'Callback Number: (540) 631-2977', 'Did the caller request to cancel an appointment? Palliative Co-Visit on 3/18/25', 'If yes, did you offer to reschedule the appointment (if within PCC scope)? No', 'Reason for Call: Patient called to reschedule Palliative Co-Visit as she will no longer be available on 3/18.', and 'Action taken: Sent email to Care Team and Market for follow-up.'

## Call Documentation During Network Interruptions

Ubiquity is an essential application we use every day to manage patient care. However, the application may be offline due to network issues, updates, or other circumstances that are outside of our control.

Interruption of Ubiquity services should **NOT** interrupt patient care.

### Communication & Documentation Guidelines

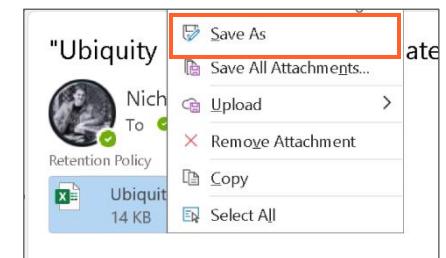
1. Your Supervisor or Manager will post a message in the APP / PCC Teams channels to announce the interruption in service.
2. You will receive an email from your Supervisor Manager with an attached “Ubiquity – Offline Tracker” document to be opened in Microsoft Excel.
3. Save the offline tracker to a location on your Laptop / Desktop that you will remember for later access.
  - The Offline Tracker is a spreadsheet that includes columns for each category of the documentation template (Reason for Call, Action Taken, etc.).
4. Use the offline tracker to take notes during calls.
5. **SAVE OFTEN!**
6. When Ubiquity comes back online, transfer your notes from the offline tracker to the appropriate patient charts.

### Call Flows

Ubiquity network outages **DO NOT** alter any call flows. Because we cannot view patient charts or enrollment statuses during this time, please treat all patients who call in as ELIGIBLE & ENGAGED.

### “Ubiquity Down” System Management

If a network-wide Ubiquity issue is encountered and announced, **DO NOT** restart your system unless given express permission from your Supervisor or Manager.



# LM1 PCC Call Audits

## Table of Contents

- [Call Audit Overview](#)
- [The LM1 PCC Call Audit Scorecard](#)
- [Call Scoring Metrics & Values](#)
- [Auto-Failed Call Audits](#)
- [The Call Audit Challenge Process](#)
- [Call Audits & Fraud Prevention](#)

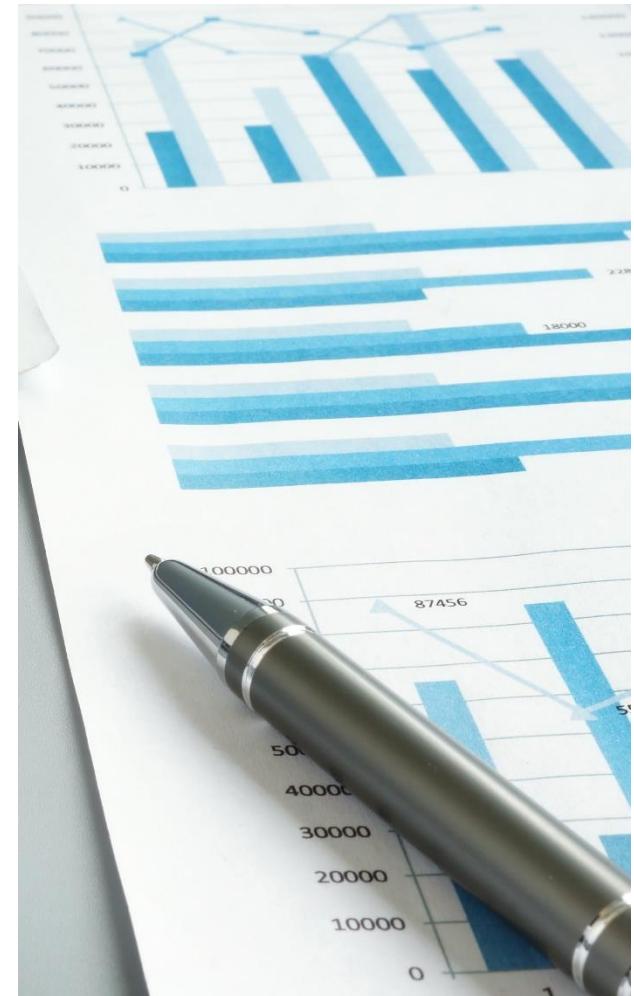
## Call Audit Overview

Regular call audits will be conducted by the LM1 TIQ team for LM1 PCCs. During this process, a random call is selected from each LM1 PCC and assessed based on the Call Audit Scorecard (*see next page*). Once scored, the scorecard and a copy of the call recording will be sent to the LM1 PCC, supervisors, and managers by email.

Scorecards will also include general feedback on the subject of empathy, courtesy, and overall call management. Supervisors will be advised when a coaching opportunity is discovered during call review.

In addition, LM1 PCCs have the opportunity to challenge the scores they receive to have them re-reviewed by the LM1 TIQ team.

Under normal circumstances, PCCs will meet with their Supervisor once per month to discuss the previous months scores. At that time, the Supervisor may offer minor coaching and general advice for call handling.



# The LM1 PCC Call Audit Scorecard

Scoring Criteria	Description	Max Points	Full Credit	No Credit	Half Credit	Total Points
#1 Greeting	Must include: "Thank you for Calling Landmark First. My name is "Name", Patient Care Coordinator"	6				6
#2 HIPAA Verification	PCC attempted to confirm three HIPAA identifiers during the call. "To help us protect the patient's protected health information...": - Please provide the patient's full name. - Thank you for that, may I have the patient's date of birth? - As a last step for verification, may I have the patient's full address including city, state, and ZIP code please?	14				14
#3 Caller Authorization	PCC verbally verified the caller's identity and relationship to the patient. (Check for caller authorization and perform authorization steps as needed)	10				10
#4 Phone Number	PCC verified a 10-digit callback number where the caller can be reached in the event of a disconnection.	6				6
#5 Interruptions	PCC did not intentionally speak over the caller at any point during the call.	7				7
#6 Holds	PCC obtained the caller's verbal permission before placing them on hold.	7				7
#7 Transfer Introduction	PCC provided their name and role to the provider upon accepted transfer.	10				10
#8 Request Summary	PCC accurately identified the caller, the caller's relationship to the patient, and summarized their request during the call transfer process?	10				10
#9 Empathy Statement	PCC used at least one (1) empathy phrase during a patient or caregiver call: (I'm sorry you aren't feeling well today; I'm sorry for your loss; I'd like to take care of this for you)	6				6
#10 Courtesy Statement	PCC used at least two (2) courtesy phrases on this call other than those used in the greeting? (Please; thank you; May I; I'd be happy to assist you; Thank you for calling Landmark First; Please allow me one moment to access your chart)	6				6
#11 Ubiquity Note	Did the PCC document the call appropriately using the approved documentation template defined by the #LM1PCC Hashkey? For Appointment Verification Calls (no partial credit): - Did the PCC ask both COVID Screening Questions: 1. Do you or anyone in your home have fever/chills, cough/sore throat, SOB beyond what is typical, or new loss of taste or smell? 2. Have you or any other persons in the home been Dx with COVID19 in the last 30 days?	18				18
<b>Auto-Fail Criteria:</b>						
#12 HIPAA Breach	PCC gave disclosed HIPAA restricted information without verifying the caller's authorized status.					
#13 Noise Quality	Background or personally distracting noises were heard in the PCC's work environment.					
#14 Dialogue	PCC used profanity or derogatory statements during this call. (Including hold times)					
#15 Etiquette	PCC exhibited blatant rudeness / negative behaviors or comments during the call?					
#16 Call Handoff	PCC failed to follow the "hand-off process" and / or denied the caller clinical care? (small talk, unnecessary chatting, keeping the patient on hold extended time, etc.)					
#17 Call Flows	PCC failed to either: 1. Follow the Call Transfer Flow Process 2. Return a dropped patient's call 3. Pause the ongoing call recording					

## Assessment Criteria

1. Greeting
2. HIPAA Verification
3. Caller Authorization
4. Callback Number
5. Interruptions Assessment
6. Verbal Hold Notifications & Consent
7. Transfer Introduction
8. Caller Request Summary
9. Empathy Statements Used
10. Courtesy Statements Used
11. Call Documentation

## Auto-Fail Conditions

12. HIPAA Breach
13. Noise Quality
14. Negative, Degrading, or Derogatory Dialogue
15. Use of Profanity
16. Call Handoff Small Talk or Unprofessionalism
17. Failure to Follow the Call Transfer Workflows

## Call Scoring Metrics & Values

### Passing Scores

A call audit score is considered passing if the total percentage of points earned is *greater-or-equal-to 90%*.

A passing score may still be submitted with additional feedback and call observations which the PCC is expected to review.

### Failing Scores

A call audit score is considered failing if the total percentage of points earned is *less-than-or-equal-to 89%*.

A failing scorecard will be submitted with additional feedback and coaching recommendations which the PCC is expected to review with their Supervisor.

## Auto-Failed Calls

If an auto-fail condition is discovered during a call quality audit, any points earned are nullified and the Auto-Failed score is submitted.

The context and circumstances of the auto-fail condition may lead to coaching, disciplinary action, or termination based on Manager's discretion and the PCC's prior performance.

In addition, repetitive auto-failed call audits may lead to disciplinary action up to and including termination at Manager's discretion.

Please review the **Feedback** section of the PCC Call Audit scorecard for more information.

## Auto-Failed Calls

### PCC Annual Raise Calculation

Statistic	Description	%
Individual Call Audit Scores	$\geq 90\% - \text{LM1 PCC Call Audits}$	25%
Abandon Rate by Team	$\leq 5\% - \text{number of calls not answered.}$	25%
Individual After Call Work (ACW)	$\leq 20\% - \text{Time spent in after call work.}$	25%
Compliance & Complaints	$\leq 3\% - \text{Internal / External Complaints}$	25%

## The Call Audit Challenge Process

Before submitting a challenge to the Quality Team, please review your scorecard with a Supervisor to receive more information or coaching based on the score and feedback you received.

1. If, after this session, you still wish to submit a challenge for review, send an email to [lm1\\_quality@optum.com](mailto:lm1_quality@optum.com)
  - o Be sure to attach original scorecard & call recording to challenge email
2. If any adjustments are made to your score based on your challenge, you will be notified by email with an updated scorecard attached.

### Call Re-Evaluation

When a call is re-evaluated by the Quality Team, please be aware of the following:

- Challenging your score does not guarantee that it will be changed, or that it will be changed for the better.
- As new situations present themselves, Landmark First may update existing scorecards with new criteria.
- Any PCC / APP who receives consecutive / frequent failed scores is subject to disciplinary action or additional training as the situation deems appropriate.

## Call Audits & Fraud Prevention

While the call audit scorecard provides specific call audit guidelines, the Landmark First Quality Team may discover additional concerns when reviewing calls that are not specific to scoring criteria. If an instance of suspected fraud is discovered during a call audit, the PCC's manager will be contacted and asked to investigate.

If a case of fraud is confirmed by the PCC Manager, the individual responsible may be subject to disciplinary action and possible termination based on Manager's discretion.

### Employee Responsibility

*It is everyone's responsibility to create a work environment of integrity, quality, and honesty.*

*If you witness a fraudulent activity within the company, please report it using the Fraud Reporting Line or Portal.*

## Examples of Fraud

Below are examples of fraudulent activities that, if performed, may lead to disciplinary action up to and including termination:

- Submitting falsified reports of systems issues, weather conditions, or other false circumstances to avoid taking calls.
- Manipulating Active / Inactive statuses within applications to falsify attendance reports, break times, or lunch periods.
- Failure to answer a call, email, or chat message within the threshold period.
- Failure to verbally alert the caller of call's answer, or remaining silent at the start of a call until disconnection.
- Intentional disconnection of a call / conversation or closure of email or chat applications.
- Transferring a caller, email, or message back to the queue without reason.
- Prematurely transferring a caller, email, or message to the back of the queue or another department without reason.
- Intentionally providing inaccurate information to conclude a call, email, or chat conversation.
- Refusal to take a call, email, or chat message.
- Intentionally placing the caller on hold for lengthy durations beyond the threshold period without reason.
- Intentional AUX or ACW jumping or intentional manipulation of AUX / ACW statuses to avoid taking calls.
- Remaining in a call beyond the threshold period after the caller has been transferred to the next level of support.
- Any other acts analogous to the foregoing.