

# Administrative Workflows



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### Training Tip:

LM1 PCCs can NOT schedule new appointments for patients.

### Training Tip:

LM1 Clinical staff may be required to complete administrative work if there are no PCCs currently available.

### Training Tip:

Calculate the LOCAL TIME of a Market prior to contacting Landmark / Optum employees in that region.

# Beginning & Ending Your Shift

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## Logging Into Applications

There are several applications you will need to open prior to handling calls. Remain logged into these applications until the end of your shift. See below for details:

### Login Checklist



Ubiquity  
*\*Requires VPN Connection*



Microsoft Outlook



Humanity



Microsoft Teams



NENA (EPIC) 911 Database



Genesys Cloud

### Post-Login Checklist

- ✓ Login to the IEX Webstation:  
<https://wfmshared.optum.com/wfm/webstation/home>
- ✓ Review any emailed announcements / news in Outlook.
- ✓ Use your Teams chat to say “Hello” to your co-workers.
- ✓ Set yourself as “On Queue” in Genesys to start taking calls.
- ✓ Inform your team when you are going to lunch and on break using Microsoft Teams

## During Your Shift:

- ✓ Set your meal and breaks statuses in Genesys and the IEX Webstation.

## Ending Your Shift

- ✓ Report your time using Global Self Service (GSS)
- ✓ Log Out of Genesys
- ✓ Finalize any open notes in Ubiquity
- ✓ Check and respond to any emails
- ✓ Say goodbye to your peers in Teams chat



# Administrative V. Clinical Calls

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## Coverage Goals:

Remember that it is the goal of Landmark First to provide remote call and medical coverage for the Market offices. As a general rule, if we are able to handle a call remotely, we should do so.

## Administrative Calls / Messages:

*Resolved by:* LM1 PCCs

LM1 APCs & Triage RNs (if no PCCs available)

*Definition:* Administrative calls are non-medical, non-emergency calls made by a patient, caregiver, or representative. These calls may include:

- Taking general messages for a market provider.
- Confirming an appointment date / time.
- Rescheduling Maintenance Visits.
- Providing FAX numbers for the receipt of medical records.
- Providing general information about Landmark Health services.



## Clinical Calls / Messages:

*Resolved by:* LM1 APCs & Triage RNs

*Definition:* Clinical calls include questions or statements expressing a medical need or concern of any kind, including:

- Questions regarding prescriptions.
- Reporting an injury.
- Reporting depression / suicidal thoughts.
- Requests for a new appointment due to a medical concern.
- Questions regarding blood pressure or heart rate readings.
- Any situation that appears on the **Buzzwords** list.



# Managing Appointments

## Appointment Request Types:

### *Appointment Check-In Calls:*

The patient or caregiver requests to hear the scheduled date and time of their next appointment with Landmark.



Provide the appointment's Start Time window to the patient (typically 2 hours).



Do ***NOT*** provide this information to an unauthorized caller.

*Appointment Confirmation Calls:* A patient or caregiver will call to confirm their availability for an upcoming appointment.

Appointments can only be confirmed by patients or caregivers.



Ask the Covid-19 Screening Questions.

- If "Negative" confirm the appointment in Ubiquity using the Appointment Details window.
- If positive, note this result in Ubiquity, but ***DO NOT*** confirm the appointment.

*Appointment Cancellation Calls:* A patient or caregiver will call to cancel or reschedule an upcoming appointment.



Follow the steps outlined in the "Appointment Cancellation Requests" table to resolve.

*Appointment Specification Calls:* A patient or caregiver may call with specific instructions for the provider coming to see them on their scheduled appointment day. This may include:

- Instructions for entering the home.
- Requesting a more-precise start time within their assigned start window.
- How to best prepare for the appointment.



Include these questions in your Ubiquity documentation.

## Who Can Confirm Appointments?

Patients and their caregivers can confirm appointments with Landmark.

## Covid-19 Screening Questions:

Patients must clear a Covid-19 screening prior to appointment confirmation. Please ask the following questions to complete the Covid-19 screening.

1. Do you or anyone in your home have fever/chills, cough/sore throat, shortness of breath beyond what is typical, or new loss of taste or smell?
2. Have you or any other persons in the home been diagnosed with COVID-19 in the last 30 days?

If a patient successfully clears the Covid-19 screening, please proceed with the appointment confirmation. Please also provide the patient or caregiver with the appointment's Start Time window.

## When to Confirm Appointments:

Appointments should only be verified if the verification call is made within **ONE WEEK** of the scheduled appointment date.



## Attention – Return Calls for Appointment Confirmations

Sometimes, a patient or caregiver will report having missed a call from Landmark.

- Check recent notes in Ubiquity to determine if an Appointment Confirmation was attempted by a Care Team member.
  - If so, please complete the Covid-19 screening and Appointment Confirmation steps.

## Rescheduling Appointments:

If a caller needs to reschedule an appointment, no Appointment Verification is necessary at that time and the Covid-19 questions **DO NOT** need to be asked.



**Visit Types:**

<i>Visit Type</i>	<i>Description</i>	<i>Management</i>
Initial Visits (IV1 & IV2)	Enrollment Visits	<ul style="list-style-type: none"> <li>Scheduled by Outreach</li> <li>Rescheduled by Outreach</li> <li>Visit completed by Market Provider</li> </ul>
Urgent Visit / Initial Visit (UVIV1)	Enrollment Visit + Urgent Visit Eligible patient calls in with a clinical complaint but has not yet been enrolled.	<ul style="list-style-type: none"> <li>Triage completed by LM1</li> <li>Visit completed by Market Provider</li> </ul>
Urgent Visits (UV)	Urgent Visits that do not involve an Urgentivist Extender.	<ul style="list-style-type: none"> <li>During business hours posted to Teams by LM1 or Market NCM</li> <li>After Hours handoff to On-Call Provider.</li> <li>Visit completed by Market Provider</li> </ul>
Urgentivist Extender Urgent Visit (UEUV)	Urgentivist Extender visits the patient in their home with oversight.	<ul style="list-style-type: none"> <li>Scheduled by LM1 Clinical staff or Market NCM</li> <li>Posted to Teams by LM1 Clinical staff or Market NCM.</li> <li>Oversight completed by LM1 APC or Market Provider.</li> </ul>
Telephonic Urgent Visit (Tele UV)	Telephonic visit with a patient who has a medical complaint that does not necessitate a face-to-face visit or a face-to-face visit is not possible.	<ul style="list-style-type: none"> <li>Completed after LM1 Clinical triage or handoff</li> <li>Completed by LM1 APC or Market Provider</li> </ul>
Post-Discharge Visits (PDV)	Visits completed when appropriate following hospitalization or ED visit.	<ul style="list-style-type: none"> <li>Posted to Teams by LM1 Clinical staff after triage</li> <li>Scheduled by Market NCM</li> <li>Completed by Market Provider</li> </ul>
Maintenance Visit (MV)	Routine visits. Frequency dependent on patient Acuity and Intensity.	<ul style="list-style-type: none"> <li>Scheduled by Market Provider, NCM, or CC</li> <li>Rescheduled by LM1 PCC staff only</li> <li>Completed by Market Provider</li> </ul>
Palliative Care Visit	Routine palliative management visits. Frequency of visits depend on patient Acuity and Intensity	<ul style="list-style-type: none"> <li>Scheduled by Market Provider, NCM, or CC</li> <li>Completed by Market Provider with or without Social Worker.</li> </ul>



**Special Scheduling Conditions by Appointment Type:**

<i><b>Appointment</b></i>	<i><b>Procedure</b></i>	<i><b>Documentation</b></i>
Maintenance Visits	Cancel or Reschedule <ul style="list-style-type: none"> <li>• Call Provider / Email Care Team and Market for same-day requests</li> </ul>	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> </ul>
Initial Visits (Inv. or Inv2)	Email Local Outreach	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> </ul>
Urgent Visits	Do <u>NOT</u> Cancel or Reschedule	<ul style="list-style-type: none"> <li>• Notify a Team Lead or Supervisor if on duty.</li> <li>• Document Ubiquity.</li> <li>• Forward to LM1 UE Email: <a href="mailto:lm1uehandoff@optum.com">lm1uehandoff@optum.com</a></li> </ul>
Post Discharge Visits	Cancel, but do <u>NOT</u> Reschedule	<ul style="list-style-type: none"> <li>• Document Ubiquity.</li> </ul>
Palliative Care Visit	Do <u>NOT</u> Cancel or Reschedule	<ul style="list-style-type: none"> <li>• Document Ubiquity.</li> </ul>

**Attention – Attempt to Reschedule Appointments!**

It is important that our patients receive regular care and maintenance visits in order to maintain their quality of life and health.

- For this reason, ALWAYS ask the patient if they want to reschedule an appointment if a cancelation is requested.
- Please strongly suggest, BUT DO NOT FORCE the issue when the patient does not want to reschedule.
- If you are not able to reschedule during the call, the Care Team will conduct a follow-up at a later time.

**Managing Appointment Cancellations & Rescheduling By Visit Type:***Maintenance Visits:*

<b>Request</b>	<b>Visit Date</b>	<b>Communication</b>	<b>Documentation</b>
Appointment Confirmation	-1 Week	Covid-19 Screening	<ul style="list-style-type: none"> <li>• Confirm the appointment (no Covid-19 symptoms)</li> <li>• Document Ubiquity</li> </ul>
Appointment Confirmation	+1 Week	Provide the start time window	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> </ul>
Appointment Cancellation / Reschedule	-1 Week +1 Week	Offer Telephonic visit	<ul style="list-style-type: none"> <li>• Update the visit to “Telephonic” if accepted</li> <li>• Cancel / Reschedule the visit if “no” to telephonic</li> <li>• Document Ubiquity</li> </ul>
Appointment Cancellation / Reschedule	Next Day	Offer Telephonic visit	<ul style="list-style-type: none"> <li>• Update the visit to “Telephonic” if accepted</li> <li>• Cancel / Reschedule the visit if “no” to telephonic</li> <li>• Document Ubiquity</li> <li>• Email the Provider, Care Team, and Market</li> </ul>
Appointment Cancellation / Reschedule	Same Day (market hours)	Call the visiting provider to update	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> </ul>
		<ul style="list-style-type: none"> <li>• If the provider does not answer</li> </ul>	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> <li>• Email the Provider, Care Team, and Market</li> </ul>
Appointment Cancellation / Reschedule	Same Day (after hours)	Inform the patient that their provider will be notified of the update	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> <li>• Email the Provider, Care Team, and Market</li> </ul>
Provider Arrival Questions	Same Day (market hours)	1. Provide the start time window 2. If late, call the provider for an arrival update	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> </ul>
		<ul style="list-style-type: none"> <li>• If the provider does not answer</li> </ul>	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> <li>• Email the Provider, Care Team, and Market</li> </ul>



*Initial Visits or Second Initial Visits (IV or IV2):*

<b>Request</b>	<b>Visit Date</b>	<b>Communication</b>	<b>Documentation</b>
Appointment Confirmation	-1 Week	Covid-19 Screening	<ul style="list-style-type: none"> <li>• Confirm the appointment (no Covid-19 symptoms)</li> <li>• Document Ubiquity</li> </ul>
Appointment Confirmation	+1 Week	Provide the start time window	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> </ul>
Appointment Cancellation / Reschedule	-1 Week +1 Week	Inform the patient that their request is noted	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> </ul>
Appointment Cancellation	Next Day	Inform the patient that their request is noted	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> <li>• Email the Provider and Local Outreach Team</li> </ul>
Appointment Cancellation / Reschedule	Same Day (market hours)	Call the visiting provider to update	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> </ul>
		<ul style="list-style-type: none"> <li>• If the provider does not answer</li> </ul>	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> <li>• Email the Provider and Local Outreach Team</li> </ul>
Appointment Cancellation / Reschedule	Same Day (after hours)	Inform the caller that their provider will be notified of the update	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> <li>• Email the Provider and Local Outreach Team</li> </ul>
Provider Arrival Questions	Same Day (market hours)	1. Provide the start time window 2. If late, call the provider for an arrival update	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> </ul>
		<ul style="list-style-type: none"> <li>• If the provider does not answer</li> </ul>	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> <li>• Email the Provider and Local Outreach Team</li> </ul>

*Urgent Visits:*

<b>Request</b>	<b>Visit Date</b>	<b>Communication</b>	<b>Documentation</b>
Appointment Confirmation	-1 Week	Covid-19 Screening	<ul style="list-style-type: none"> <li>• Confirm the appointment (no Covid-19 symptoms)</li> <li>• Document Ubiquity</li> </ul>
Appointment Confirmation	+1 Week	Provide the start time window	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> </ul>
Appointment Cancellation / Reschedule	-1 Week +1 Week Next Day	Inform the patient that their request is noted	<ul style="list-style-type: none"> <li>• Notify a Team Lead or Supervisor if on duty.</li> <li>• Document Ubiquity.</li> <li>• Forward to LM1 UE Email: <a href="mailto:lm1uehandoff@optum.com">lm1uehandoff@optum.com</a></li> </ul>
Appointment Cancellation / Reschedule	Same Day (market hours)	Call the visiting provider to update	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> <li>• Forward to LM1 UE Email: <a href="mailto:lm1uehandoff@optum.com">lm1uehandoff@optum.com</a></li> </ul>
		<ul style="list-style-type: none"> <li>• If the provider does not answer</li> </ul>	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> <li>• Email the Provider, Care Team, and Market</li> <li>• Forward to LM1 UE Email: <a href="mailto:lm1uehandoff@optum.com">lm1uehandoff@optum.com</a></li> </ul>
Appointment Cancellation / Reschedule	Same Day (after hours)	Inform the caller that their provider will be notified of the update	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> <li>• Email the Provider, Care Team, and Market</li> <li>• Forward to LM1 UE Email: <a href="mailto:lm1uehandoff@optum.com">lm1uehandoff@optum.com</a></li> </ul>
Provider Arrival Questions	Same Day (market hours)	1. Provide the start time window 2. If late, call the provider for an arrival update	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> </ul>
		<ul style="list-style-type: none"> <li>• If the provider does not answer</li> </ul>	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> <li>• Email the Provider, Care Team, and Market</li> <li>• Forward to LM1 UE Email: <a href="mailto:lm1uehandoff@optum.com">lm1uehandoff@optum.com</a></li> </ul>

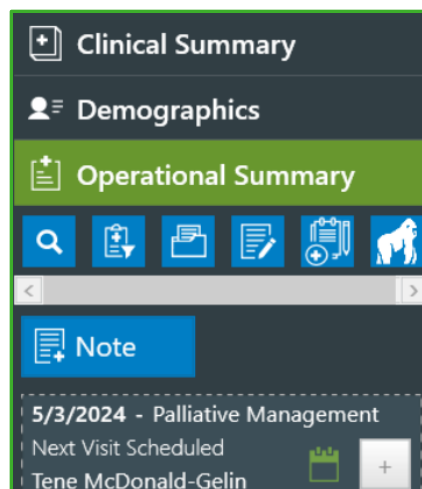
*Post-Discharge Visits:*

<b>Request</b>	<b>Visit Date</b>	<b>Communication</b>	<b>Documentation</b>
Appointment Confirmation	-1 Week	Covid-19 Screening	<ul style="list-style-type: none"> <li>• Confirm the appointment (no Covid-19 symptoms)</li> <li>• Document Ubiquity</li> </ul>
Appointment Confirmation	+1 Week	Provide the start time window	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> </ul>
Appointment Cancellation	-1 Week +1 Week	Inform the patient that their request is noted	<ul style="list-style-type: none"> <li>• Cancel the visit</li> <li>• Document Ubiquity</li> </ul>
Appointment Cancellation	Next Day	Inform the patient that their request is noted	<ul style="list-style-type: none"> <li>• Cancel the visit</li> <li>• Document Ubiquity</li> <li>• Email the Provider, Care Team, and Market</li> </ul>
Appointment Reschedule	Any	Inform the caller that their request is noted	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> </ul>
Appointment Cancellation / Reschedule	Same Day (market hours)	Call the visiting provider to update	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> </ul>
		<ul style="list-style-type: none"> <li>• If the provider does not answer</li> </ul>	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> <li>• Email the Provider, Care Team, and Market</li> </ul>
Appointment Cancellation / Reschedule	Same Day (after hours)	Inform the caller that their provider will be notified of the update	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> <li>• Email the Provider, Care Team, and Market</li> </ul>
Provider Arrival Questions	Same Day (market hours)	1. Provide the start time window 2. If late, call the provider for an arrival update	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> <li>• Email the Provider, Care Team, and Market</li> </ul>
		<ul style="list-style-type: none"> <li>• If the provider does not answer</li> </ul>	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> <li>• Email the Provider, Care Team, and Market</li> </ul>

*Palliative Care Visits:*

<b>Request</b>	<b>Visit Date</b>	<b>Communication</b>	<b>Documentation</b>
Appointment Confirmation	-1 Week	Covid-19 Screening	<ul style="list-style-type: none"> <li>• Confirm the appointment (no Covid-19 symptoms)</li> <li>• Document Ubiquity</li> </ul>
Appointment Confirmation	+1 Week	Provide the start time window	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> </ul>
Appointment Cancellation / Reschedule	-1 Week +1 Week Next Day	Inform the patient that their request is noted	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> </ul>
Appointment Cancellation / Reschedule	Same Day (market hours)	Call the visiting provider to update	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> </ul>
		<ul style="list-style-type: none"> <li>• If the provider does not answer</li> </ul>	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> <li>• Email the Provider, Care Team, and Market</li> </ul>
Appointment Cancellation / Reschedule	Same Day (after hours)	Inform the patient that their provider will be notified of the update	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> <li>• Email the Provider, Care Team, and Market</li> </ul>
Provider Arrival Questions	Same Day (market hours)	3. Provide the start time window	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> </ul>
		4. If late, call the provider for an arrival update	
		<ul style="list-style-type: none"> <li>• If the provider does not answer</li> </ul>	<ul style="list-style-type: none"> <li>• Document Ubiquity</li> <li>• Email the Provider, Care Team, and Market</li> </ul>

# Updating Appointments in Ubiquity



A patient's appointments, as well as their current status, can be viewed from the Appointments table found in the Operational Summary section of the chart.

If the patient has an upcoming appointment, it will be listed below the blue "Note" button.

## The Appointments Table Layout:

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
5/3/2024	9:00 AM To 1:00 PM	4 Days	Tene McDonald-Gelin	provider	Palliative Management	Scheduled	3/11/2024	MutitaP Honsberger	MutitaP Honsberger	3/11/2024	>
4/30/2024	9:25 AM To 10:25 AM	1 Day	Boahen Kwakye	provider	Urgent Visit	Other	4/29/2024	Manpreet Kaur	Manpreet Kaur	4/29/2024	>

Table Column	Description
<i>Date of Visit:</i>	The date of the visit.
<i>Start Time:</i>	A 1-5 hour arrival window of the visiting provider.
<i>Duration:</i>	The time remaining between now and the appointment.
<i>Staff Name:</i>	The name of the visiting provider.
<i>User Role:</i>	The visiting provider's title / occupation.
<i>Visit Type</i>	The type and reason for the visit.
<i>Status</i>	The appointment's current scheduling status.
<i>Status Updated On:</i>	When the appointment details or status were last updated.
<i>Status Updated By:</i>	Who updated the appointment details or status last?
<i>Scheduled By:</i>	Who initially scheduled the appointment with the patient?
<i>Scheduled On:</i>	On what day was the appointment entered into Ubiquity?
<i>Visit Details:</i>	Click to open a pop-up including specific appointment details.

## Confirm Appointments:

If a patient has a negative Covid-19 screening result, proceed to the Operational Summary section of their chart to confirm their appointment:

1. Select the button under the “Visit Details” section of the table to open a new pop-up window to display detailed appointment information and modification options:

Appointments <span>Details</span>										
Date of Visit	Start Time	Duration	Staff Name	User Role	Visit Type	Status	Status Updated On	Status Updated By	Scheduled By	Scheduled
7/14/2023	9:00 AM To 12:30 PM		Mona El-Sherif	provider	Maintenance Visit	Scheduled	5/19/2023	Mona El-Sherif	Mona El-Sherif	5/19/2023
5/19/2023	11:35 AM To 12:05 PM		Mona El-Sherif	provider	Maintenance Visit	Completed	5/19/2023	Mona El-Sherif	Yuvitza Leal	5/19/2023
5/19/2023	11:33 AM To 12:23 PM		Mona El-Sherif	provider	Maintenance Visit	Moved patient to optimize schedule	5/17/2023	Odell Slaughter	Mona El-Sherif	4/24/2023
5/18/2023	2:10 PM To 2:35 PM		Mona El-Sherif	provider	Maintenance Visit	Patient not available at home visit	5/19/2023	Mona El-Sherif	Odell Slaughter	5/17/2023
4/28/2023	10:30 AM To 10:40 AM		Alicia Hansome	social worker	Telephonic	Completed	4/28/2023	Alicia Hansome	Alicia Hansome	4/24/2023

2. Check the “Confirm” option in the Visit Details window:

Visit Details

Patient Name

xxxxx xxxxx ( 2385128 )

Staff Type

provider

Travel Time

-

Geographical Note

-

Visit Type

Telephonic

Staff Name

Mona El-Sherif

Duration

20 Mins

Visit Note

-

Date and Time

7/14/2023 09:00 AM To 12:30 PM

Visit Address

-

Scheduled

☒ Confirmed

Confirmation details

Paul Nichols, 04/30/2024 09:31 AM EST

Note

Cancel


Reschedule Visit

Cancel Visit

Complete Visit

3. There is no save option for this function. Simply close the window once the “Confirm” option is checked. If successfully confirmed, a new icon will appear beside the visit date:

Date of Visit

 7/14/2023



## Telephonic Visit Updates:

When a patient chooses to update their scheduled appointment to a Telephonic visit:

1. Select the button under the “Visit Details” section of the table to open a new pop-up window to display detailed appointment information and modification options:

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	
7/14/2023	9:00 AM To 12:30 PM		Mona El-Sherif	provider	Maintenance Visit	Scheduled	5/19/2023	Mona El-Sherif	Mona El-Sherif	5/19/2023	>
5/19/2023	11:35 AM To 12:05 PM		Mona El-Sherif	provider	Maintenance Visit	Completed	5/19/2023	Mona El-Sherif	Yuvitza Leal	5/19/2023	
5/19/2023	11:33 AM To 12:23 PM		Mona El-Sherif	provider	Maintenance Visit	Moved patient to optimize schedule	5/17/2023	Odell Slaughter	Mona El-Sherif	4/24/2023	>
5/18/2023	2:10 PM To 2:35 PM		Mona El-Sherif	provider	Maintenance Visit	Patient not available at home visit	5/19/2023	Mona El-Sherif	Odell Slaughter	5/17/2023	>
4/28/2023	10:30 AM To 10:40 AM		Alicia Hansome	social worker	Telephonic	Completed	4/28/2023	Alicia Hansome	Alicia Hansome	4/24/2023	>

2. At the top of the new pop-up window, look for the “Visit Type” heading and click the pencil-shaped icon beside “Maintenance Visit” to make an edit:

Visit Details

Patient Name

xxxxx xxxxx ( 2385128 )

Staff Type

provider

Travel Time

5 Mins

Geographical Note

-

☐ Patient Cancelled
 ☐ Landmark Cancelled


\* Status

Scheduled

☐ Confirmed
 Confirmation details

Visit Type

Maintenance Visit



Staff Name

Mona El-Sherif

Date and Time

7/14/2023 09:00 AM To 12:30 PM


Visit Address

175 xxxxxxxxxxxx xx, xxx 465, xxxxxx xxxxxx, xx, 10314

Duration

50 Mins

Visit Note



3. Clicking the edit icon will allow you to select “Maintenance Visit” as an option in a drop-down list.

Visit Details

Patient Name

xxxxx xxxxx ( 2385128 )

Staff Type

provider

Travel Time

5 Mins

Geographical Note

-

☐ Patient Cancelled
 ☐ Landmark Can

Visit Type

Maintenance Visit

Maintenance Visit

Initial Visit2

Urgent Visit

Post Discharge Visit

Telephonic

Palliative Prognosis Visit

Date and Time

7/14/2023 09:00 AM To 12:30 PM

Visit Address

175 xxxxxxxxxxxx xx, xxx 465, xxxxxx xxxxxx, xx, 10314

- From the options available, choose “Telephonic” and then click “Save”.

Visit Details

Patient Name: xxxxx xxxxx (2385128)

Visit Type: Telephonic

Staff Type: provider

Staff Name: Mona El-Sherif

Date and Time: 7/14/2023 09:00 AM To 12:30 PM

Travel Time: 5 Mins

Duration: 50 Mins

Visit Address: 175 xxxxxxxxxxxx xx, xxx 465, xxxxxx xxxxxx, xx, 10314

Geographical Note

Visit Note

- Once saved, you may close the Visit Details window.

## Appointment Cancellations:

If a patient requests to cancel an appointment:

- Select the button under the “Visit Details” section of the table to open a new pop-up window to display detailed appointment information and modification options:

Date of Visit	Start Time	Duration	Staff Name	User Role	Visit Type	Status	Status Updated On	Status Updated By	Scheduled By	Scheduled C	Details
7/14/2023	9:00 AM To 12:30 PM		Mona El-Sherif	provider	Maintenance Visit	Scheduled	5/19/2023	Mona El-Sherif	Mona El-Sherif	5/19/2023	>
5/19/2023	11:35 AM To 12:05 PM		Mona El-Sherif	provider	Maintenance Visit	Completed	5/19/2023	Mona El-Sherif	Yuvitra Leal	5/19/2023	>
5/19/2023	11:33 AM To 12:23 PM		Mona El-Sherif	provider	Maintenance Visit	Moved patient to optimize schedule	5/17/2023	Odell Slaughter	Mona El-Sherif	4/24/2023	>
5/18/2023	2:10 PM To 2:35 PM		Mona El-Sherif	provider	Maintenance Visit	Patient not available at home visit	5/19/2023	Mona El-Sherif	Odell Slaughter	5/17/2023	>
4/28/2023	10:30 AM To 10:40 AM		Alicia Hansome	social worker	Telephonic	Completed	4/28/2023	Alicia Hansome	Alicia Hansome	4/24/2023	>

- Check the “Patient Cancelled” option:

Visit Details

Patient Name: xxxxx xxxxx (2081579)

Visit Type: Maintenance Visit

Staff Type: provider

Staff Name: Jennifer Cross, NP

Date and Time: 9/7/2023 01:00 PM To 05:00 PM

Travel Time: 31 Mins

Duration: 50 Mins

Visit Address: 3124 xxxxxx xxxxx, xxxxxx, xx, 43065

Geographical Note

Visit Note

☒ Patient Cancelled ☐ Landmark Cancelled

Status: --Select--

Confirmed

Confirmation details

Cancel Reschedule Visit Cancel Visit

- You will be required to select a reason for cancellation from the “Status” drop-down list and enter a brief note to indicate why the appointment was cancelled.

The screenshot shows the 'Visit Details' form with the following fields:

Staff type	Staff Name	Date and Time
provider	Jennifer Cross, NP	9/7/2023 01:00 PM To 05:00 PM
Travel Time	Duration	Visit Address
31 Mins	50 Mins	3124 xxxxxx xxxx, xxxxxx, xx, 43065
Geographical Note	Visit Note	
-	-	

Below the table, there are two checkboxes: ☒ Patient Cancelled and ☐ Landmark Cancelled.

The 'Status' dropdown menu is open, showing the following options:

- Patient not home at time of visit (selected)
- Confirmed
- Confirmation details

The 'Note' field contains the text: "Patient will be visiting family that day."

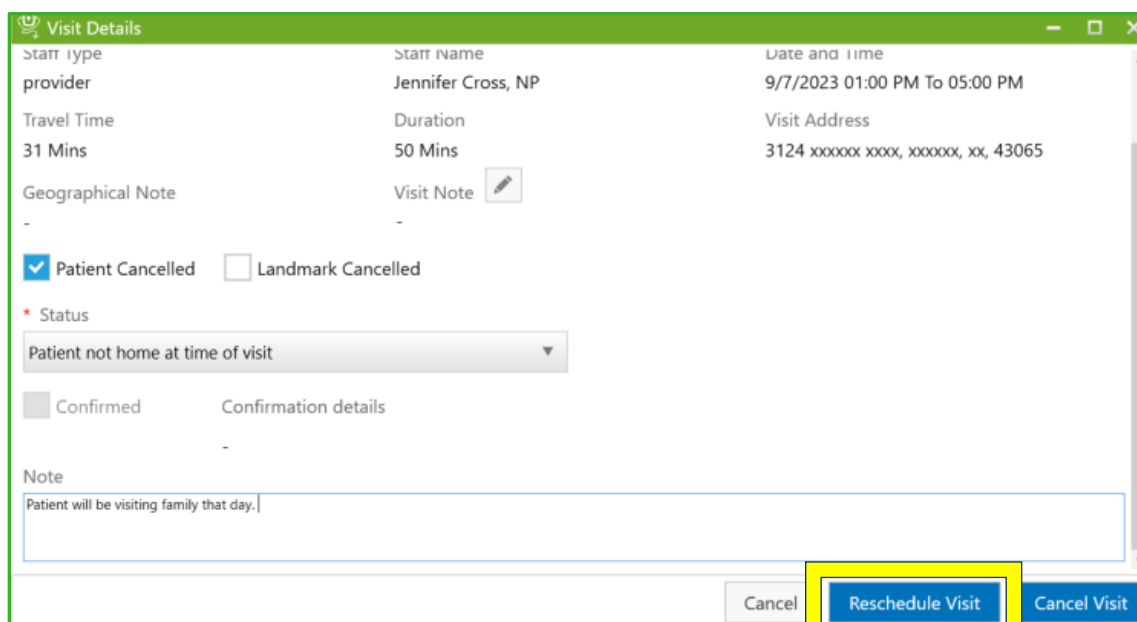
At the bottom of the form, there are three buttons: Cancel, Reschedule Visit, and Cancel Visit.

- When finished, click “Cancel Visit”:

This screenshot is identical to the one above, showing the 'Visit Details' form with the 'Status' dropdown menu open and the 'Note' field filled. The 'Cancel Visit' button at the bottom right is highlighted with a yellow box.

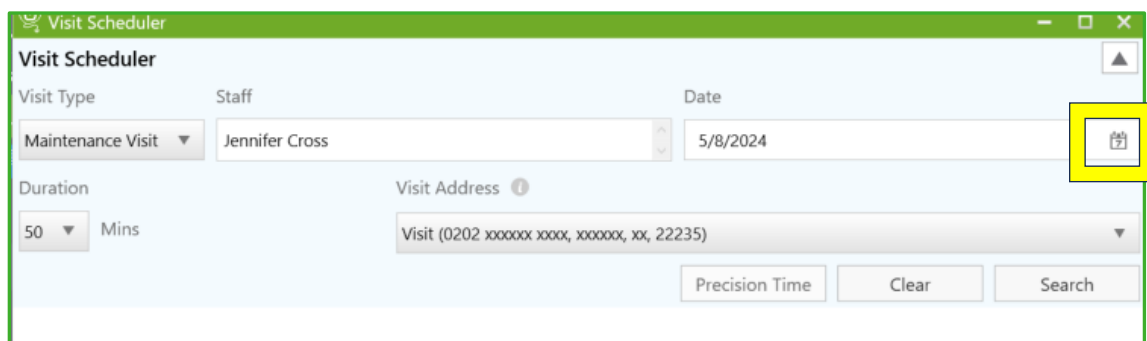
**Appointment Reschedule:**

1. Follow the procedure for cancelling an appointment for the patient; however, click “Reschedule Visit” instead of cancelling it:



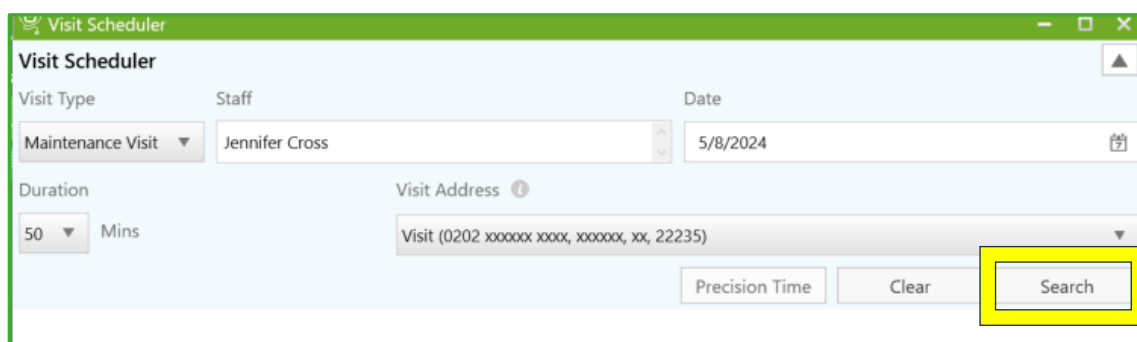
The screenshot shows the "Visit Details" window. It contains fields for Staff type, provider, Travel Time, 31 Mins, Geographical Note, Staff Name, Jennifer Cross, NP, Duration, 50 Mins, Visit Note, Date and time, 9/7/2023 01:00 PM To 05:00 PM, and Visit Address, 3124 xxxxxx xxxx, xxxxxx, xx, 43065. There are checkboxes for Patient Cancelled (checked) and Landmark Cancelled (unchecked). A Status dropdown menu is set to "Patient not home at time of visit". There is a Confirmed checkbox and a Confirmation details field. A Note field contains the text "Patient will be visiting family that day." At the bottom, there are three buttons: Cancel, Reschedule Visit (highlighted with a yellow box), and Cancel Visit.

2. A second pop-up will appear to allow you to search alternative dates for the appointment. Navigate to the “Date” field and click the calendar icon to select an alternative appointment date:



The screenshot shows the "Visit Scheduler" window. It contains fields for Visit Type, Staff, Date, Duration, and Visit Address. The Visit Type is set to Maintenance Visit, Staff is Jennifer Cross, Date is 5/8/2024, Duration is 50 Mins, and Visit Address is Visit (0202 xxxxxx xxxx, xxxxxx, xx, 22235). At the bottom, there are three buttons: Precision Time, Clear, and Search. A calendar icon is highlighted with a yellow box next to the Date field.

3. With a new date selected, click “Search”:



The screenshot shows the "Visit Scheduler" window. It contains fields for Visit Type, Staff, Date, Duration, and Visit Address. The Visit Type is set to Maintenance Visit, Staff is Jennifer Cross, Date is 5/8/2024, Duration is 50 Mins, and Visit Address is Visit (0202 xxxxxx xxxx, xxxxxx, xx, 22235). At the bottom, there are three buttons: Precision Time, Clear, and Search (highlighted with a yellow box).

- Offer the available appointment slots to the patient. If the patient selects one, click on the “Select Window” option:

**Visit Scheduler**

Visit Type: Maintenance Visit  
Staff: Claretta Green, provider  
Date: 5/15/2024

Duration: 60 Mins  
Visit Address: Visit (0202 xxxxxx xxxx, xxxxxx, xx, 22235)

Precision Time Clear Search

**Appointment Window**

<p>Monday, 5/20/2024 9:00 AM - 1:00 PM Additional Travel Time: 43 min</p> <p>Select Window</p>	<p>Monday, 5/13/2024 1:00 PM - 5:00 PM Additional Travel Time: 25 min</p> <p>Select Window</p>	<p>Tuesday, 5/21/2024 1:00 PM - 5:00 PM Additional Travel Time: 43 min</p> <p>Select Window</p>
--	--	---

Cancel Schedule Now

- Click “Schedule Now” to complete the appointment reschedule:

**Visit Scheduler**

Visit Type: Maintenance Visit  
Staff: Claretta Green, provider  
Date: 5/15/2024

Duration: 60 Mins  
Visit Address: Visit (0202 xxxxxx xxxx, xxxxxx, xx, 22235)

Precision Time Clear Search

**Appointment Window**

<p>Monday, 5/20/2024 9:00 AM - 1:00 PM Additional Travel Time: 43 min</p> <p>Select Window</p>	<p>Monday, 5/13/2024 1:00 PM - 5:00 PM Additional Travel Time: 25 min</p> <p>Select Window</p>
--	--

Cancel Schedule Now

**Staff**  
Tuesday, 21

8:00 AM	
8:15 AM	
8:30 AM	
8:45 AM	
9:00 AM	Weekly IDT and 1:1s
9:15 AM	
9:30 AM	
9:45 AM	
10:00 AM	
10:15 AM	

# Requests for Landmark Information

---

## Example - Calls Received from Non-Enrolled, Non-Engaged, Patients

1. "Hello. I received a letter from Landmark about getting some home care. Is this Landmark?"
2. "I'm not quite sure what Landmark is. Is it a medical service?"
3. "I already have insurance, why do I need Landmark?"
4. "Are you a home-help aid agency?"
5. "How do I get signed up for Landmark?"

## What is Landmark?

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; HOWEVER, you are encouraged to provide the following information when a caller asks about us for the first time:

- Landmark provides home health care solutions for patients with qualifying chronic conditions.
- 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.
  - The Central Outreach Team will then attempt to set up an Initial Visit at the patient's home.
- While the prospective patient contacts their health plan, an email will be sent from Landmark First to the Local Outreach Team to advise them of the request.
- Prospective patients should be on the lookout for phone calls from Landmark or Optum Home Health as follow-up.
- If we are unable to provide services, we may be able to refer the patient to community resources in their area.



**Follow-Up Local Outreach Email:**

After the call ends, send an email to the Central Outreach. Please include:

- Caller's Name
- Callback Number

**Example – Local Outreach Email**

➤ Send	To	<a href="mailto:CentralOutreach@optum.com">CentralOutreach@optum.com</a>
	Cc	
	Subject	Caller's Name, Location or Market
Callers Name: William Flynn		
Contact number: (919) 440-9333		

**Follow-Up with Central Outreach:**

In addition to local outreach email addresses, there is a central outreach email that should only be used if:

1. The caller is looking to start services with Landmark; AND
2. The market does not have a local outreach email.

The central outreach email: [CentralOutreach@optum.com](mailto:CentralOutreach@optum.com).

**What is an Initial Visit (IV)?**

During the initial visit, the patient will meet with a Landmark Provider to discuss:

1. What services Landmark provides.
2. Our 24/7 coverage is explained in more detail.
3. The patient's health goals and conditions are reviewed.
4. Authorized contacts and consents are approved.
5. Handouts are left with the patient that include Landmark's contact information.

**Attention – Non-Enrolled / Non-Engaged Patient Charts**

Blank charts may exist in Ubiquity for Non-Enrolled / Non-Engaged patients. Please attempt to locate such a chart if contacted by a prospective patient.

## Empathy & Courtesy Statements

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.

### Empathy / Courtesy Statement Definitions:

#### Courtesy Statement



A statement to express respect and politeness.

#### Empathy Statement



A compassionate response to acknowledge the medical, mental, or emotional state of a patient or caregiver.

*(requires active listening)*

## Empathy / Courtesy Statement Examples

Please see the lists below for suggested empathy and courtesy phrases.

### Examples - Courtesy Statements



"Thank you"



"I appreciate that"



"Thank you for calling Landmark"



"Have a nice day"



"Thank you for your patience"



"One moment, please"



"You're welcome"



"I'm happy to assist"



"My apologies"



"Please hold"

### Example - Empathy Statement



"We're here for you"



"I'm sorry for your loss"



"You can call us anytime"



"I'm sorry to hear you missed our call"



"I hope your day improves"



"I appreciate your patience"



"I understand why that would be a concern"



"I'd like to help you with \_\_\_\_\_  
(restate the patient's concern)"



"I'm sorry you're going through that"

## Empathy and Active Listening

If you actively listen to a patient's concern, there are more opportunities to use empathy phrases that the caller will find meaningful. Remember that our callers:

- Are struggling with multiple ongoing health conditions.
- Might be in pain when they are speaking to us.
- 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.

# Call Transfer Guidelines:

## Expectations:

If you are listed as *On Queue* in Genesys, you are communicating your readiness to receive calls, and perform the work involved when handling calls. This applies to any timeframe throughout your shift. Please ensure that “away” or “busy” statuses are managed according

## Handoff Procedure to Clinical Staff:

When handing a call off to a member of our clinical staff, use the following process:

*APC / Triage RN*

*PCC*

1. “Hello, this is (Clinical Staff Name), (Title). How can I help you?”

“Hello, this is (PCC Name), Patient Care Coordinator with Landmark First. Are you ready for the patient’s ID number?”

2.

3. “Yes, ready.”

*(PCC Provides Patient ID and Eligibility Status)*

4.

5. *(Confirm patients’ name and DOB once pulled up in Ubiquity)*

- *Confirm RN licensure, APC credentialing, patient eligibility*

*(Summarize patient request)*

- *Include History of Present Illness (HPI) present concern / complaint*

6.

7. *(APC / Triage RN agrees to the handoff)*

- *Do NOT decline the call handoff (see exceptions below)*

“Transferring Now”

8.

## Handoff Exceptions

A clinical staff member may refuse a call if:

- The patient's chart is closed.
- There is a conflict in RN licensure or APC credentialing.

## Additional Procedural Guidelines

During the Handoff process, PCCs should **NEVER**:

- Leave the patient on hold for extended periods of time.
- No small talk / No Personal Chatting.
- No commentary on patient's request.
- Give clinical advice of any kind.

## Voicemails



If redirected to a provider's voicemail, **DO NOT LEAVE A MESSAGE**. Move to the next stage of the Call Transfer Flow Process. This also applies to Same-Day Appointment Cancellations.

## Non-Eligible Members Expressing Medical Concerns

### If Non-Urgent

Please take a message for the **Local Outreach Team**.

### Email Subject:

Patient ID, Market

(ADD EXCEPTION FOR ELEGIBLE.)

### Email Body:

- Patient's First Initial, Last Name
- Callback Number

### If Urgent Medical Situation



Advise the caller to contact 911 or emergency services in their area.

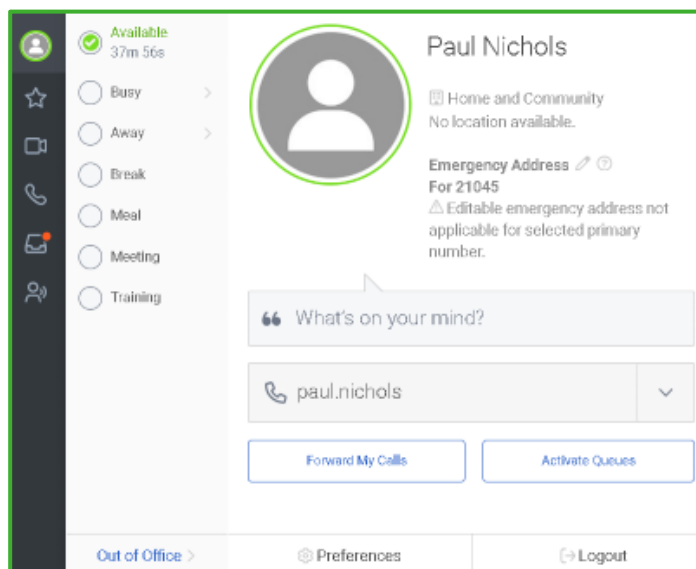
If the caller is unable to call 911, follow Steps 6 – 9 in the Urgent Calls / Contact 911 section.

## Attention – Eligible Patient Transfers

Eligible patients listed as Non-Engaged should be transferred to a clinician even if they do not have an IV or IV2 listed in the chart.

# 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 Team Lead
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)

## Attention – Going Off-Queue

If “On Queue” selecting any other status will automatically take you “Off Queue”



**Sub-Statuses:**

In addition to the main statuses listed above, there are “sub-statuses” that pertain to documentation and LM1-specific activities:

<i>Status</i>	<i>Sub-Status</i>	<i>When to Use</i>	<i>Recommended Time Limit</i>
<b>Busy</b>	<b>Answering Service</b>	While reviewing / responding to an answering service message	While reviewing / responding
<b>Busy</b>	<b>Busy</b>	Do not use	(None)
<b>Busy</b>	<b>Callback</b>	When responding to a callback message	Length of call
<b>Busy</b>	<b>Documenting</b>	Documenting Ubiquity + Email on patient's behalf.	10 minutes
<b>Busy</b>	<b>Triage</b>	When a triage request is received by a clinician	Length of triage communication (clinical only)
<b>Busy</b>	<b>Urgent Visit Documentation</b>	When a clinician documents an urgent visit	
<b>Busy</b>	<b>Urgent Visit Oversight</b>	When a clinician provides oversight to an urgent visit	Length of oversight (clinical only)
<b>Away</b>	<b>Away</b>	Do not use	(none)
<b>Away</b>	<b>Personal</b>	Bathroom breaks (example)	Notify Team Lead
<b>Away</b>	<b>System Down</b>	When there is a network issue or applications not responding	Notify Team Lead

**Attention – Exceeding Time Limits**

If your ACW exceeds the recommended time limits, please notify your Team Lead immediately.

## 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:

### Available Dispositions:

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

After Call Work 0:57

Find wrap-up code

- 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
- LM1 - Wrong Number

Wrap-up code is required  
Select wrap-up code

Done

# Documenting Calls

## About Call Documenting:

- A note must be entered into Ubiquity for EVERY call having to do with a Landmark patient or prospective patient.
  - If a chart exists for the patient, we document, regardless of eligibility or enrollment status.
- The Approved Documentation template MUST be used for each Ubiquity note.
- Note accuracy and formatting are considered during weekly Call Quality Audits and effect PCC scoring.

## Ubiquity Note Template:

Callers Name:  
 Callers Relationship to patient:  
 Patient full name:  
 Patient date of Birth:  
 Patient Address:  
 Contact number:  
 Reason for calling:  
 Did the caller request to cancel an appt?  
 If yes, did you offer a Telephonic Visit?  
 Reason For Cancellation:  
 Action taken:

## Example – Ubiquity Note

Callers Name: Aspen Wright  
 Callers Relationship to patient: Self  
 Patient full name: Aspen Wright  
 Patient date of Birth: 3/25/1963  
 Patient Address: 300 Pure Leaf Lane, Apartment 4, Niagara Falls, NY, 14304  
 Contact number: (716) 521-4466  
 Reason for calling: Request to be seen for eye irritation in left eye that began last night.  
 Did the caller request to cancel an appt? No  
 If yes, did you offer a Telephonic Visit? N/A  
 Reason For Cancellation: N/A  
 Action taken: Transferred to APC Arnold

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

- ✓ The name of the provider who accepted your call handoff.
- ✓ Include a confirmation of any updates you made to the patients contact information under the “Action Taken” heading.
- ✓ Indicate when you have obtained authorization for a new caller.
- ✓ If appointment reschedule / cancellation is requested, include the type of appointment in your “Reason for Call” section.
- ✓ 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 Covid-19 screening taking during appointment confirmations.

**Information to Exclude:**

Document facts that pertain to a patient's concern, communications, or health. When documenting a call, exclude:

- ⊗ Statements regarding provider availability.
- ⊗ Statements categorizing the patient as rude, moody, or angry.
- ⊗ Failed call transfer attempts.
- ⊗ Any reference to ACES complaints

**Documenting Answering Service Calls:**

1. Include your full name in your Answering Service email reply:

**Example – Answering Service Message Documentation**

Admin. Call – Complete – Paul Nichols  
*(Paste Answering Service Message Here)*

3. Copy / paste your reply, along with the Answering Service message, into your Ubiquity Note (this will replace the approved template for Answering Service communications).

**Documenting Triaged Calls:**

In the event an email is sent to an LM1 Triage Mailbox as the result of a call, use the following statement in your documentation:

**Ubiquity Note Template Guidelines – Triage Affirmation**

Action taken: Caller is agreeable to a call back. Sent an email to LM1 Clinical Triage inbox for a clinician to return patient's call.

**Example - Triaged Call**

Callers Name: Ricki Doe  
 Callers Relationship to patient: Self  
 Patient full name: Ricki Doe  
 Patient date of Birth: 3/25/1963  
 Patient Address: 1226 Porcelain Road, Rochester, NY 14602  
 Contact number: (518) 481-1776  
 Reason for calling: Patient is experiencing left foot pain and believes it to be gout  
 Did the caller request to cancel an appt? No  
 If yes, did you offer a Telephonic Visit? N/A  
 Reason For Cancellation: N/A  
 Action taken: Pt. agreeable to a call back. Sent an email to LM1 Clinical Triage inbox for a clinician to return Patient's call.

## Documenting Escalated Calls:

Use the following documentation methods as follow-up to a verbally abusive call:

### Documenting a Verbally Abusive Call

Callers Name:  
Callers Relationship to patient:  
Patient full name:  
Patient date of Birth:  
Patient Address:  
Contact number:  
Reason for calling: Escalated to (Team Lead or Supervisor Title) (Team Lead or Supervisor Name)  
Did the caller request to cancel an appt?  
If yes, did you offer a Telephonic Visit?  
Reason for Cancellation:  
Action taken: Escalated and Documented.

### Example – Escalated Call

Callers Name: Peter T. Lane  
Callers Relationship to patient: Son  
Patient full name: Simon Lane  
Patient date of Birth: 2/16/1960  
Patient Address: 77 Snowfall Ave. Apartment 3, Detroit, MI 48201  
Contact number: (917) 577-6363  
Reason for calling: Escalated to LM1 Team Lead, Lisa  
Did the caller request to cancel an appt? No  
If yes, did you offer a Telephonic Visit? N/A  
Reason for Cancellation? N/A  
Action taken: Escalated and Documented

## Proofreading:

We depend on the accuracy of documentation as a history of our patients' health and communications. The wrong note in the wrong chart could result in a HIPAA violation, or an unwelcome change in a patient's care. In addition, documenting inaccurate information does not provide the Market office locations the coverage we have promised.

For this reason, **ALWAYS PROOFREAD YOUR DOCUMENTATION!**



**Documenting Standards & Communication:**

Use the following table as a guide to standard documenting practices at Landmark First:

<b>Create a note in Ubiquity</b>	<ul style="list-style-type: none"> <li>• Required for every call associated with a patient.</li> <li>• Create, proofread, and finalize a note in Ubiquity.</li> <li>• These notes create a “call history” for the patient to be referenced in future communications.</li> </ul>
<b>Emails to the Care Team and Market</b>	<p>In addition to your Ubiquity note, email the Care Team listed in the patient’s chart, as well as the market mailbox, for the following conditions.</p> <ul style="list-style-type: none"> <li>• Same-Day appointment updates (reschedules / cancellations / adjustments).</li> <li>• Next-Day appointment cancellation if the call was made after business hours the day before.</li> </ul>
<b>Emails to Local Outreach</b>	<ul style="list-style-type: none"> <li>• If a Non-Engaged patient has a chart in Ubiquity</li> <li>• An Engaged Patient has not had their Initial Visit (IV) with Landmark and has no Care Team listed.</li> </ul>

**Email Guidelines:**

When call documentation requires that an email be sent on a patient’s behalf, the following guidelines apply:

- Copy / Paste the text of your Ubiquity note into the body of the email.
- Follow the standard subject line format:

Emails – Standard Subject



Patient’s ID, Market or Metro

- Double-check to make sure that you have all the appropriate contacts added to the email:
  - The Care Team and Market will always be emailed together.
  - No additional contacts needed when emailing Local Outreach
  - No additional contacts needed when emailing an LM1 Triage Mailbox

**Training Tip:**

Market (Call Center), Triage, and Local Outreach emails can be found in the [Markets Summary](#) section of this manual.




Email Example 1: Next Day Appointment Cancellation	
 Send	<div>From </div> <div>Miami Market Email + Care Team Members</div>
	<div>To</div> <div></div>
	<div>Cc</div> <div></div>
	<div>Bcc</div> <div></div>
<div>Subject</div> <div>2219901, Miami</div>	
<div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> </div>	
<p>Patient's Name: E. Newground</p> <p>Contact number: (786) 237-9101</p>	
<p>Call Date: 7/17/2023</p> <p>Patient Name: Earl Newground</p> <p>Reason for Calling: Earl reports a visit from his daughter who is there to look after him throughout the duration of July. Earl requests that daughter, Jane, be added to his chart as an authorized contact. Because Jane can bring Earl to the hospital, if needed, he does not need an appointment at this time. Please cancel Maintenance Visit scheduled for 7/18/2023</p> <p>Name / DOB / Address: Verified</p>	

This example demonstrates an email that is sent to the Care Team and Market as the result of a Same Day / Next Day appointment cancellation:

- The market staff member will check the corresponding note in Ubiquity to gather further information.

**Email Example 2: Contacting Local Outreach**

 **From** ▼ Local Outreach Email

**To**

**Cc**

**Bcc**

**Subject** Kelly Flynn, South Carolina

1 2 3 4 5 6


Callers Name: William Flynn  
Contact number: (919) 440-9333

Call Date: 9/27/2023  
Caller Name: William Flynn  
Patient Name: Kelly Flynn  
Reason for Calling: William is calling to request more information about Landmark and believes it might be an ideal service for his mother, Kelly.  
Name / DOB / Address: Name and DOB Noted

This example demonstrates an email that is sent to the Local Outreach based after a caller inquires about service for a prospective patient.

- PCC documented the patient's location for Local Outreach follow-up.
- A reachable contact number was documented for Local Outreach follow-up.

**Email Example 3: Contacting a Triage Mailbox**

 Send	From ▾	Market Triage Mailbox
	To	
	Cc	
	Bcc	
Subject		2212221, Maine

1 2 3 4 5 6

Callers Name: S. Bellows  
Contact number: (218) 565-5512

Call Date: 1/13/2024  
Caller Name: Samantha Bellows  
Patient Name: Timothy Bellows  
Reason for Calling: Timothy Bellows calls to report that his wife, Samantha, fell while getting dressed. There is a hard wood floor in the bedroom and she had a rough collision on her side. She has several bruises on her hip and shoulder that are turning purple and growing. Timothy is worried that there might be a fracture or internal bleeding due to the color of bruises.  
Name / DOB / Address: Name and DOB Noted

This example demonstrates an email that is sent to a triage mailbox due to a caller's expressed non-urgent medical concern.

- The LM1 Clinician will check the corresponding note in Ubiquity and follow-up on the patient's clinical concern.

# Adding a Note to Ubiquity

Use the following guidelines to create and finalize a note in Ubiquity:

1. Click the “Note” option in the patient’s chart.

The screenshot shows the Ubiquity patient chart for a patient named BEBCBB UG0000 (2164045). The left sidebar contains a 'Note' button highlighted with a yellow arrow. The main content area displays various patient information including demographics, operational summary, and a care snapshot.

2. Add the Note’s Category, Subcategory, and Supplemental information:

The screenshot shows the 'New Note' form. The 'Note Date' is 4/3/2024 11:51 AM. The 'Category' is 'Landmark First – P...' and the 'Sub Category' is 'Administrative'. The 'Supplementary' section contains a grid of checkboxes for various forms, with 'Phone Call' checked. A yellow arrow points to the 'Start' button at the bottom right.

- Category = Landmark First – Patient Call
- Sub Category = Administrative
- Supplementary = Phone Call (check)

When finished, click “Start”

### 3. Using the note template to enter the call's details.

The screenshot shows the 'Case Note' template in the Landmark software. The template is highlighted with a yellow border. It includes fields for Callers Name, Relationship, Patient info, Address, Contact number, Reason for calling, and Action taken. To the right, there are checkboxes for 'Note Type' and 'Contact Type'.

- Copy / Paste the note template into the text field highlighted above.
- Fill in each category of the template with relevant information.

### 4. Add Note Type and Contact Type information.

The screenshot shows the 'Case Note' template in the Landmark software. The 'Note Type' and 'Contact Type' sections are now populated with checkboxes. A yellow arrow points to the 'Save & Close' button at the bottom right.

- Note Type = Call(s) Completed
  - An additional “Call(s) Completed” check to indicate who you spoke to (the patient, caregiver, community provider, etc...)
- Contact Type = Check based on who you spoke to (the patient, caregiver, community provider, etc...)

Click “Save & Close” when complete.

5. You must Finalize the note after closing. This is like signing your name to the Note to attest to its accuracy.

Click on the Note's Open status and select "Finalized Documentation" from the drop-down menu.

The screenshot shows a software window with a patient record for BEBCBB UG0000 (2164045), 83 yrs, (9/22/1940), Female, (105) 011-1310. The patient is UHC M&R 002302032, Eligible, Cincinnati, Risk - Complexivist, Acuity B-High, Intensity 1, Full Code, and Engaged. The note is dated 5/28/2021 9:42:43 AM, created on 5/28/2021 9:43:03 AM EST, and is a Telephonic case note by Paul Nichols. The 'Open' status is highlighted with a yellow box, and a yellow arrow points to the 'Finalized Documentation' option in the dropdown menu. The 'Case Note' section contains fields for Callers Name, Relationship, Patient full name, date of birth, address, contact number, reason for calling, and cancellation details. The 'Tags' section shows the note type as 'Call(s) completed, Call(s) completed - Patient'.

6. Click "Update" when Finalized Documentation is selected.

The screenshot shows the same software window as the previous one, but now the 'Finalized Documentation' option is selected in the 'Note Status' dropdown menu. A yellow arrow points to the 'Update' button next to the dropdown. The 'Case Note' section and 'Tags' section remain the same as in the previous screenshot.

Your Note is now entered and Finalized.

# ***“Ubiquity Down” Call Handling***



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 Team Lead, 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 Team Lead, Supervisor, or 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**.

### **Attention – System Management during “Ubiquity Down” Time**

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

# Filing an A.C.E.S. Complaint

## Reporting Guidelines:

ACES reports should be submitted in response to:

- Patient grievances
- Quality issues
- Adverse medication events
- Process flow failures
- Inappropriate employee / staff behavior
- Discriminatory employee / staff behavior
- Insurance / HIPAA compliance concerns.



The Details of an A.C.E.S. complaint should be limited. Describe the nature of the complaint in general terms with few details included.

### Attention – A.C.E.S. Documentation

References to ACES complaint submission, or the details of an ACES complaint should not be included in after-call documentation.

If the events of a call lead to the filing of an ACES complaint, follow the procedure for [Documenting Escalated Calls](#).

### Attention – When to file an A.C.E.S. Complaint

Do not assume that a patient wishes to have an A.C.E.S. complaint filed on their behalf. Only file an A.C.E.S. complaint if a patient explicitly requests it.

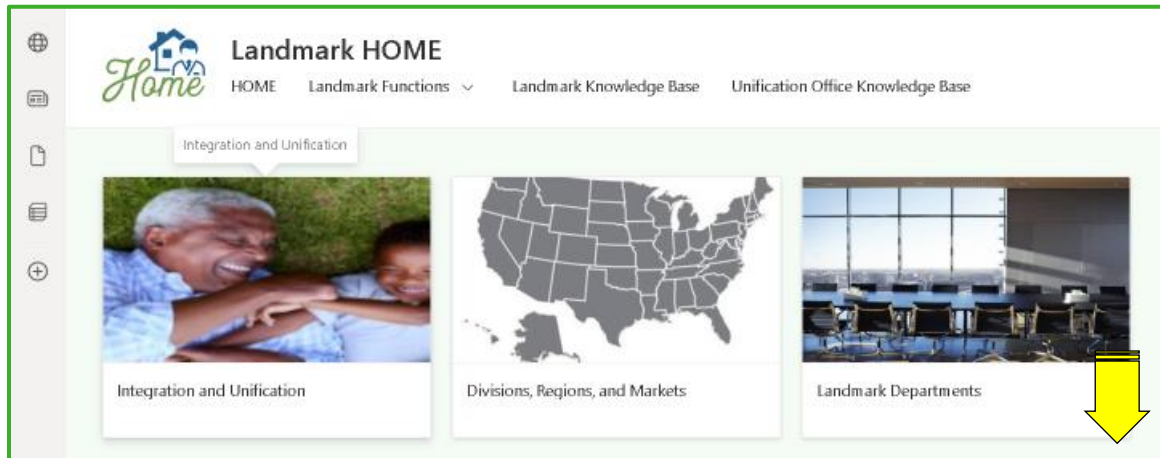


## Access & Use

The ACES complaint form can be accessed via SharePoint and Landmark Home:

1. Visit the Landmark Homepage and scroll to the bottom of the webpage:

<https://landmarkhealth.sharepoint.com/sites/Intranet>



Click the “A.C.E.S(Incident/Complaint Report)” option:



2. You will be redirected to the ACES complaint form landing page. Click “Next” to proceed.



- Indicate whether the incident concerns a patient or employee. If the incident involves an employee, confirm whether they are a Prospero or Landmark staff member. When finished, click "Next".

**Landmark Incident/Complaint Report (ACES)** Automated Complaints & Adverse Events System (ACES)

Page: Type of Incident Print

Please identify whether the incident/complaint is regarding a **Landmark Patient** or **Employee**?

**NOTE:**  
 Please select "Landmark Patient" if the issue you are reporting is related to a specific patient's service/care.  
 Please select "Landmark Employee" if the issue you are reporting is unrelated to a specific patient and involves ONLY an employee.

**Patient or Employee?**  
 Select a value

**Business Entity**  
 Select a value

< Previous Save Progress Next > powered by Onspring

Patient or Employee?

- Patient
- Employee

Business Entity

- Landmark
- Optum at Home Legacy
- Prospero Legacy

## Components of the A.C.E.S. Complaint Form

Patient Name	_____
Landmark Member ID	_____
Health Plan Partner	(Select from Dropdown)
Health Plan ID	_____

Next

*Please Note: If the incident/complaint you are reporting is related to the Call Center in Landmark First, enter which Market the patient resides in under "Comments."*

Market Incident / Complaint Occurred In (Select Market from Dropdown)

Add Comment (Optional)

Metro Incident / Complaint Occurred In (Select Metro from Dropdown)

Landmark Provider

***Below, you will find some examples/instructions to help clarify for selection decision making:***

- *If patient/representative was only voicing frustration about care/service, but their needs were satisfied and does not state they want to file a complaint this would be an entry for tracking and process improvement. The health plan may not be notified.*
- *If the patient/representative states they want to file a complaint, but only so Landmark can resolve their issue to their satisfaction this should be entry for tracking and process improvement. The health plan may not be notified.*
- *If patient/representative states they want a complaint filed about our excessive calls, late appointments, etc. and requests disenrollment, this would be a request for complaint to be filed and the health plan could be notified.*
- *If the patient/representative complain about the quality of care the patient received, this would be a request for a complaint to be filed and the health plan would be notified.*
- *Any issue whereby the person entering the issue cannot determine or clarify if a complaint should be filed. (this would be reviewed for impact, tracked and trended and might require health plan notification)*
- *Patient/representative may state they do not want it to go to the HP—If so, enter it for internal tracking and process improvement and put note in comments box*

Did patient/representative request a formal complaint be filed? ☐ Yes

Is the incident entered for internal tracking for process improvement? ☐ Yes ☐ Unknown

Next

***Any COVID-19 incident involving an employee exposure to COVID-19 should be entered via the COVID-19 Reporting Survey on the LM Home Compliance Page. Please do NOT enter Employee COVID incidents into this system.***

Next

Date of Incident / Complaint	(Select Date)
Did this incident involve a possible violation of protected health information (PHI)?	(Select from Dropdown)
Incident / Complaint Category	(Select from Dropdown)
Description of Incident / Complaint	_____
Investigation Details	_____
Investigated By	_____
Incident / Complaint Supporting Documents	(Add files here)

[Save & Submit](#)

# Compliance Guidelines

The following guidelines are intended to clarify what it means for a caller to be an “authorized contact” as well as provide additional information regarding HIPAA compliance.

## Authorized Caller:

*Authorized Callers* are legal representatives for the patient who can both provide and receive information on the patient’s behalf. These individuals may be given information such as:

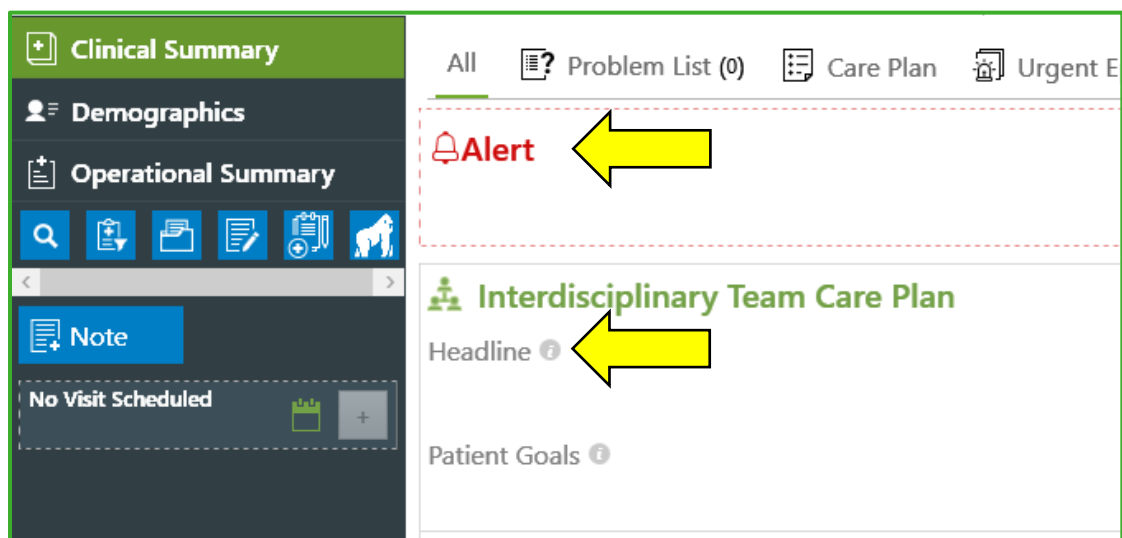
- Appointment dates / times.
- Patient’s address information.
- Patient’s contact information.
- Patient’s engagement / enrollment status with Landmark / Optum Home Health.
- Previous messages left for the patient, or contact attempts to reach the patient.
- Any other form of Protected Health Information (PHI)

### Training Tip:

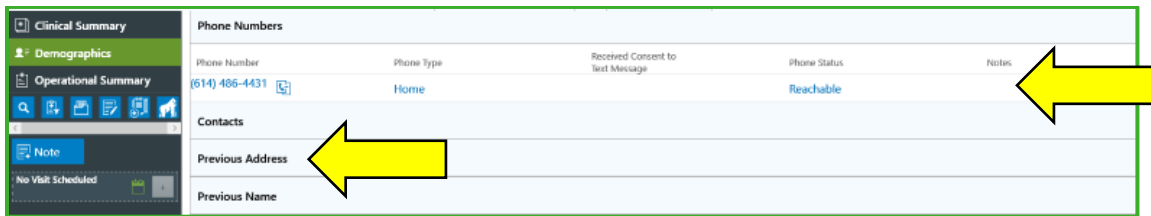
If a caller is unauthorized. We are encouraged to obtain an authorization, or an ongoing authorization, from the patient, if the patient can provide one at that time. See the “[Call Flow Transfer Process](#)” section for more information.

You can find authorized callers listed in the patient’s chart in Ubiquity under:

- Clinical Summary (*Alerts or Headline sections*).



- Demographics (*Contacts* section or *Phone Numbers* sections).



Phone Number	Phone Type	Received Consent to Text Message	Phone Status	Notes
(614) 486-4431	Home		Reachable	

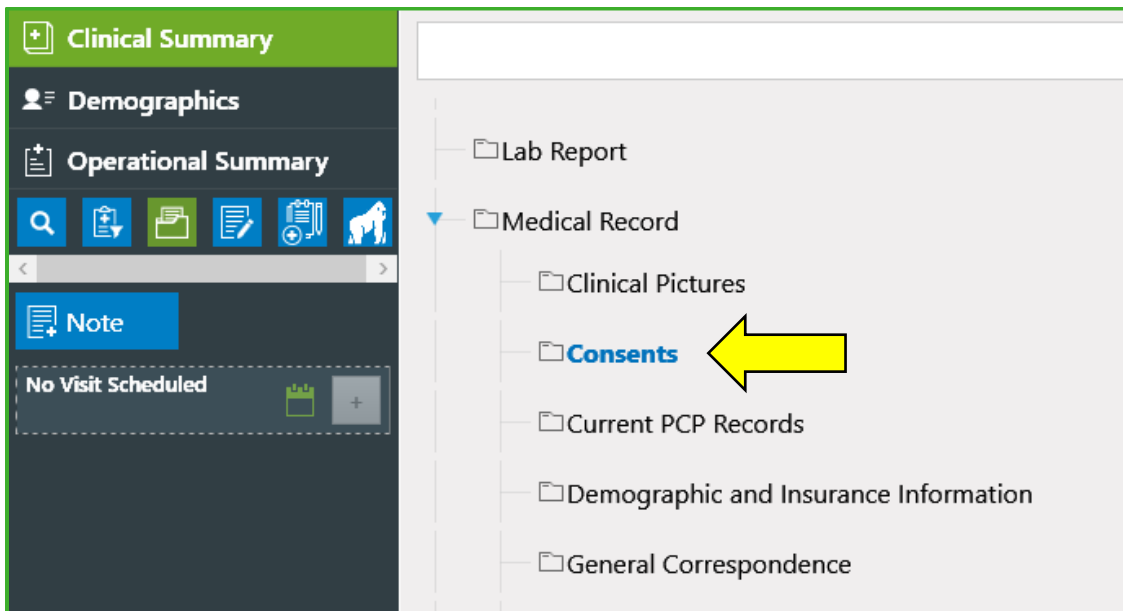
**Contacts**

Previous Address

Previous Name

(Check the “Notes” section under Phone Number listings as some Authorized Callers may appear there).

- Uploaded (scanned) consent forms in the chart’s documents.



**Clinical Summary**

**Demographics**

**Operational Summary**

**Note**

No Visit Scheduled

**Medical Record**

- Lab Report
- Medical Record
  - Clinical Pictures
  - Consents**
  - Current PCP Records
  - Demographic and Insurance Information
  - General Correspondence

### Example – Who are Authorized Callers

6. Individuals specifically listed as contacts on the patient’s chart
7. Power of Attorney
8. Legally-designated caregivers or guardians

**Unauthorized Callers:**

*Unauthorized Callers* may call to request medical assistance for a patient, or report a change in condition for the patient, but they CANNOT be provided with any Protected Health Information (PHI).

**Attention – Unauthorized Caller Communication**

UNDER NO CIRCUMSTANCES SHOULD PROTECTED HEALTH INFORMATION BE SHARED WITH AN UNAUTHORIZED CALLER!

Providing any Protected Health Information (PHI) to these callers is considered a HIPAA violation, and an auto-failed scorecard for PCCs.

**Example – Who are Unauthorized Callers**

9. Family, friends, or neighbors who are not listed in the patient's chart as authorized contacts and no legal documentation to support an Authorized Caller status.
10. Pharmacists or medical equipment providers.
11. Assisted Living Facility Staff.
12. Previous Authorized Callers who have been removed from the patient's chart.

**Clinical Care Conditions:**

Although these individuals are not privy to PHI, they can request medical assistance on behalf of patients. Therefore, the Call Transfer Flow Process is not altered when we are contacted by an Unauthorized Caller.

If an Unauthorized Caller indicates a clinical concern for the patient, please follow the clinical call transfer flows.

**Attention – Clinical Care**

WE CANNOT DENY CLINICAL CARE TO OUR PATIENTS REGARDLESS OF THE CALLER'S AUTHORIZATION STATUS!

**What is PHI:**

Note sure what information is protected by HIPAA? The categories of information below should be shared with Authorized Callers ONLY.

- Name
- Addresses
- Dates (*appointments, enrollment, etc.*)
- Patient or Contact Phone Numbers
- Patient's Fax Number
- Patient's Email addresses
- Social Security Number
- Medical Record Number (Including Landmark Patient ID and Optum ID)
- Health Plan Beneficiary Number
- Account Number
- Certificate or License Number
- Any Other Unique Identifying Characteristic

