# Landmark First

## Company Resources & Employee Reference Job Aid

### Topic Selection

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

| | | |
|---|---|---|
| About Our Work | Position Outlines | Policies & Guidelines |
| Attendance & PTO Reporting | Compliance Standards | LM1 Call Transfer Guidelines |
| Primary Contacts & Links | Troubleshoot System Issues | |

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# About Our Work

## About Landmark Health

Landmark Health was formed in 2013 to solve a problem that exists in the United States for people at greatest risk. Many people with multiple chronic health conditions rely on hospital emergency rooms as their primary source of health care. For our families, loved ones and communities, that simply isn't good enough.

Landmark approaches care using the patient's personal health characteristics, not historical utilization. Our medical care is in collaboration with the patients' regular primary care providers and other specialists.

Employees who thrive at Landmark believe in our purpose to change health care for complex, chronic patients. Changing the status quo takes hard, dedicated work. But doing that work for the greater good motivates us and moves us forward.

Landmark Health offices operate during traditional business hours between Monday and Friday from 8:30 AM to 5:30 PM (local time).

## About Landmark First

When a patient calls Landmark Health, they are routed to Landmark First before reaching the local office. Landmark First provides 24 / 7 remote call coverage and clinical assistance to patients of Landmark Health as a first point of resolution.

the caller's question or concern can be resolved remotely, Landmark First will manage that call from start to finish; however, On-Call Providers may be dispatched to a patient's home for Urgent Visits.

**Review our vision, values, and information about the population we serve on the next page.*

## Vision

Landmark will transform health care by dramatically improving the quality of life in our communities.

## Values

- We show unwavering commitment.
- We uphold absolute integrity.
- We are empathetic and compassionate.
- We are resourceful and action-oriented.
- We look to continuously improve everything we do.
- We celebrate our accomplishments, large and small.

## About Our Patients

- Landmark Patients have 6 or more qualifying chronic conditions to be eligible for our services.
- Eligibility is determined by the patient’s insurance provider and are enrolled as a benefit of their health plan.
- Many Landmark patients are elderly, home-bound, and have difficulty accessing their Primary Care Provider (PCP)
- Some of our patients are experiencing end-of-life events, behavioral struggles, or mental impairments that make empathy key to communication.
- Some patients rely on trusted friends or family members to communicate on their behalf (as authorized contacts).
- Some patients will call us to handle emergency or life-threatening medical situations.
- We tell our patients to call us for any reason.

# Position Outlines

## Roles & Responsibilities

It is the responsibility of every employee to:

- Adhere to all applicable Optum / Landmark policies including Attendance, Telephonic, and Holiday policies.
- Follow the latest published call flows, documenting guidelines, encounter procedures, and additional collaborations on behalf of our patients.
- Follow state and federal compliance laws including HIPAA and any legalities associated with state licensing.
- Protecting & storing company-issued equipment according to Optum / Landmark Policy.
- Completing assigned compliance training by the given deadlines.

**Learn more about the specific expectations of each role on the following pages.*

## The Advanced Practice Clinician (LM1 APC)

- Documenting updates concerning a patient's health.
- Accepting information from the patient's Primary Care Provider.
- Dispatching and overseeing Urgentivist Extender visits in a patient's home.
- Contacting 911 in the event of an emergency on behalf of a patient.
- Telephonic UV patient Management.
- LM1 provider management of a patient's acute changes in condition" Accepting lab / test results from diagnostic facilities.
- Assessing a patient's condition while referencing their electronic health record.
- Work in collaboration with LM market providers and the patient's community providers

## The Triage Registered Nurse (LM1 TRN)

- Triage clinical patient calls and fulfill administrative requests, as necessary.
- Handle triage emails and messages and determine when handoff to APC / Market Provider is necessary.
- Handoff to market to request UVs
- Schedule UEUVs
- Handoff Tele-UV requests to LM1 APCs
- Review medication updates and respond to medication questions.
- Handle lab and diagnostic center communications via email / web portal.
- Additional collaboration with the market and LM1 providers or community providers when appropriate.

## The Patient Care Coordinator (LM1 PCC)

- Provide 24/7 national remote call coverage.
- Assist patients with rescheduling appointments.
- Updating patient charts with messages for providers or visiting clinicians.
- Transfer patients to LM1 Clinicians or On-Call market staff to manage medical concerns.
- Contacting 911 or other emergency services on a patient’s behalf.
- Updating contact or arrival instructions on a patient’s chart.
- Contacting On-Call Market Providers to assist in patient care when appropriate.
- Handle return calls to Landmark staff following the Call Transfer Flow Process.
- Answer patient, or prospective patient, questions regarding Landmark services.
- Contacting Local Outreach teams when interest is expressed in Landmark services.

***LM1 PCC Scope***

*Under **NO CIRCOMSTANCES** should a LM1 PCC deliver clinical / medical guidance of any kind to a caller.*

# Policies & Guidelines

## Table of Contents



## About Company Policies & Guidelines

The information in this section is reviewed with all employees during initial onboarding. Trainings may be re-introduced as policies and guidelines are updated.

Failure to adhere to the policies linked in this section may result in disciplinary action up to and including termination at the manager's discretion.

Please note that links will open in a new tab when selected.

# Employee Policies Links

Use the following links to access employee policies, resources, and guidelines on SharePoint.

## Attendance Policy

Link: [Attendance–U.S.]

The Attendance Policy sets expectations for job attendance, tardiness, and the maximum approved absences within a 12-month cycle. Conditions for planned and unplanned PTO are also specified.

## Emergency Closures & Severe Weather Guidelines

Link: [Emergency Closing and Severe Weather Guidelines]

UnitedHealth Group will stay open unless weather conditions or an emergency make it impossible to continue business. For more information, please review the full policy on SharePoint.

## Power Outage Absence Reporting

Link: *(pending)*

In the event of a power outage, follow the guidelines linked above to notify the Workforce Management team.

## Holiday Policy

Link: *(pending)*

View the A and B holiday groupings, holiday rotation, and expectations for swapping holiday shifts with coworkers.

***Policy Scope***

*The policies in this section apply to every employee. Please note any specific guidelines pertaining to Exempt and non-exempt employees as they relate to your job title.*

***Policy Review***

*During the onboarding and training period, you will be asked to sign attestations to confirm your review and understanding of these policies and guidelines.*

*For questions, please email the Landmark First Training Team at:* LM1Training@optum.com

### Telecommuter Policy

Link: Telecommuter Policy–U.S.

Review the conditions and standards of the Telecommute work model for employees including office location and privacy compliance, equipment usage, and expectations of dependent care.

### Remote Work Policy

Link: Telecommuter Policy–U.S.

Our flexible workplace is designed to support how and where employees perform their work and maximize collaboration, innovation, and performance.

### Corrective Action Process

Link: Corrective Action Process

If, during your career with the company, you do not meet performance goals or follow company policy, the Corrective Action Process may be used by your manager to help you understand and correct your performance and / or behavior.

### Internal Dispute Resolution and Arbitration

Link: Internal Dispute Resolution and Arbitration

You are encouraged to bring any work-related concerns to your direct manager, barring extenuating circumstances, within 10 days of any occurrence. For details, please review the full policy on SharePoint.

***Additional Guidelines***

*In addition to the policies linked in this section, additional job-related guidelines will apply to your daily workflows.*

*These guidelines include patient or caller interaction documentation, the operation of various web applications, call transfer workflows, and more.*

# Email Communication Guidelines

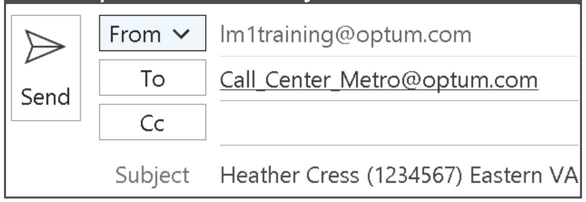
Adhere to the following guidelines when sending emails to your coworkers:

## Subject Line Format

Follow this subject line when sending emails as part of a patient or caller interaction.

- Patient Name, (ID), Metro

*Example: Email Subject Line*




## Use Your Company Email

You should always use your company email address when sending messages on behalf of the organization. This should be the only email address that you access from your company-issued computer.

## Use the “Reply All” Button with Discretion

Avoid the creation of unnecessarily complex communication volume by using the “Reply All” only when necessary. ***DO NOT*** use the “Reply All” button to respond to announcements from the leadership team, general updates, newsletters, or any other company-wide communication.

## Use Exclamation Points Sparingly

When using exclamation points in your emails:

- Avoid repetitive use to maintain professional communication.
- Do not use consecutive exclamation points at the end of the same sentence.
- When utilized, exclamation points should be limited to one per sentence.

## Use Professional Salutations

Emails are considered a formal communication method. Please use professional greetings to start your emails.

## Include a Brand-Friendly Signature

All employees are expected to use the brand-friendly Optum signature format when sending outgoing emails.

To change or update your signature in Outlook:

1. Select “File” from the navigation menu at the top of the window.
2. Click “Options”.
3. In the “Mail” tab, find the “Signature” button and select it.
4. Use the pop-up menu to create your new email signature.
5. Remember to save your signature before closing.

Open a new email to make sure your updated signature is in place.

*Example: Email Signature*

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

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

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

Optum

## Be Cautious with Humor

Something perceived as funny when spoken may come across very differently when written. Emails do not convey tone of voice or other inflections of a face-to-face conversation. Readers will apply their own interpretations to your emails when humorous language is used.

As a guideline, maintain clarity over comedy.

## Your Emails Should Be “Cross-Cultural”

Know that people from different cultures speak and write differently and miscommunication may occur as a result. Even when the sender is not trying to be funny or cute in their email, references to specific cultural material or subject matter may exclude some recipients or prevent them from fully understanding the message.

## Proofread Every Message

Do not rely on spell-checkers. Read and re-read your email a few times, preferably aloud, before sending it.

## Double Check the Recipients of your Email

Confirm that recipient email addresses are accurate to ensure prompt delivery to the correct department or contact.

## Keep Your Font Color Classic

The body of your email should maintain a consistent format:

- 10 – 12 pt font size.
- Color: Black
- Font: Ariel or Calibri

## No Electronic Communication is Ever Truly Deleted

When communicating at work, remember that your emails may be saved, photographed, forwarded, or otherwise recorded for later reporting or reference. Do not send a communication that you would not want a manager or legal team to read.

We are all responsible contributors to our professional work environment.

# Chat Communication Guidelines

Microsoft Teams channels and chats are used as the primary communication platform within this department. Because we are expected to send and receive a high volume of messages throughout our workday, clear and courteous communication is key to our success.

## Initiating a New Chat

We work in a virtual environment, so posting a new Teams chat is like knocking on the office door of a coworker. Your co-worker may not answer right away or be busy with other tasks. Because of this, begin with a simple salutation, but refrain from sending lengthy messages to start the conversation:

*Example: Effective Teams Greeting*

> Good Afternoon, Paul. Do you have a moment to chat about the Training Manual updates?

*Example: Ineffective Teams Greeting*

> Hey dude, I ran into an issue importing an .SVG vector image into the Call Transfer Workflows PowerPoint. It seems to encounter a rendering issue when viewed as a slideshow, but in previewed mode, it will display normally. I'm not sure if it's an application issue or an issue with my computer. I just sent the slide deck to your email. Do you have a minute to test the presentation on your system?

## Be Informal Without Being Inappropriate

Chats between co-workers are designed for quick and informal communication; however, it is not so informal as to mimic texting. Please avoid using excessive abbreviations, .Gif images, and emote reactions.

- While these expressions do have their place in chat conversations, overuse will impair communications.

## Ending a Chat

Both you and your co-workers handle several communications at a time and are often required to multitask between managing their chats and fulfilling their roles and responsibilities with Landmark.

- To better manage your communications, end a chat conversation by thanking our colleague for the time or help.

# Videoconferencing Communication Guidelines

Throughout your career at Optum, you will participate in regular meetings with your Supervisor or Manager to review your job performance, quality, and announcements.

## Dress for the Occasion

Be sure you are dressed appropriately and well-groomed.

- Dess for a “business casual” setting.

## Prepare Your Workstation

It is important that you prepare your workstation before the start of a videoconference. This includes removing any confidential files that could be displayed to other participants. Ensure that your background or backdrop is suitable for meetings.

## Establish Privacy

You must arrange accommodations for your dependents while you are at work. This includes children, animals, and any elderly persons under your care.

## Participate in Conditional Muting

A video conference will pull audio from all active microphone sources unless muted. This can create disorienting audio feedback for participants. To avoid this issue, please mute yourself if you are not actively speaking during the meeting.

## Unscheduled Departures

If, for any reason, you need to take an unplanned departure from a meeting, please do not interrupt the current host or speaker to announce your exit. Instead, please post a message in the corresponding chat, disable your camera, mute your microphone, and reverse these steps upon your return.

## General Professionalism Guidelines

The following are considered unprofessional conversation topics and should be avoided during all business communications:

- Avoid gossip regarding your health or the health of a co-worker or patient.
- Avoid conversations about your personal life or personal problems.
- Avoid conversations about politics or political allegiances.
- Avoid conversations about religion or religious practices of colleagues.
- Avoid conversations about one's weight.
- Avoid conversations about sex or sexual orientation.
- Do not send angry or hurtful messages of any kind.
- Do not participate in unconstructive (mean) criticism.
- Do not encourage or initiate racist jokes or comments.
- If you intend to leave the company, do not announce it prematurely.
- Messaging statements you would not read aloud is unprofessional.

Complaints regarding work, co-workers, or management should be submitted through the proper channels and should not be casually discussed.

***Repetitive Unprofessionalism***

*If your behavior is determined to be unprofessional, you will meet with your manager to discuss a plan and goals for improvement.*

*Continued unprofessional behavior will result in disciplinary action up to, and including, termination at the discretion of your manager.*

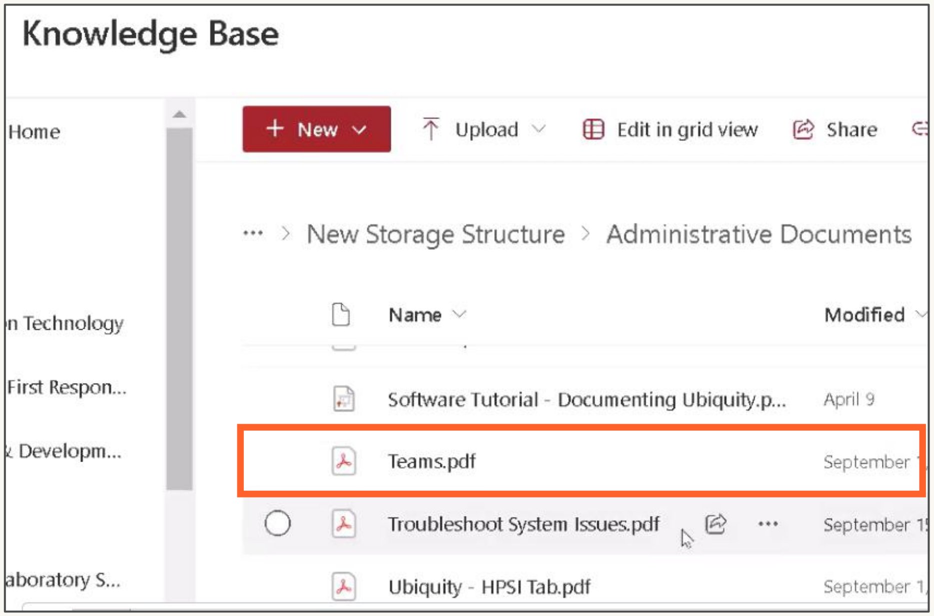
## File Sharing Best Practices

Following the guidelines in this section will help you and your coworkers access current information without the risk of file duplication, deletion, or mismanagement.

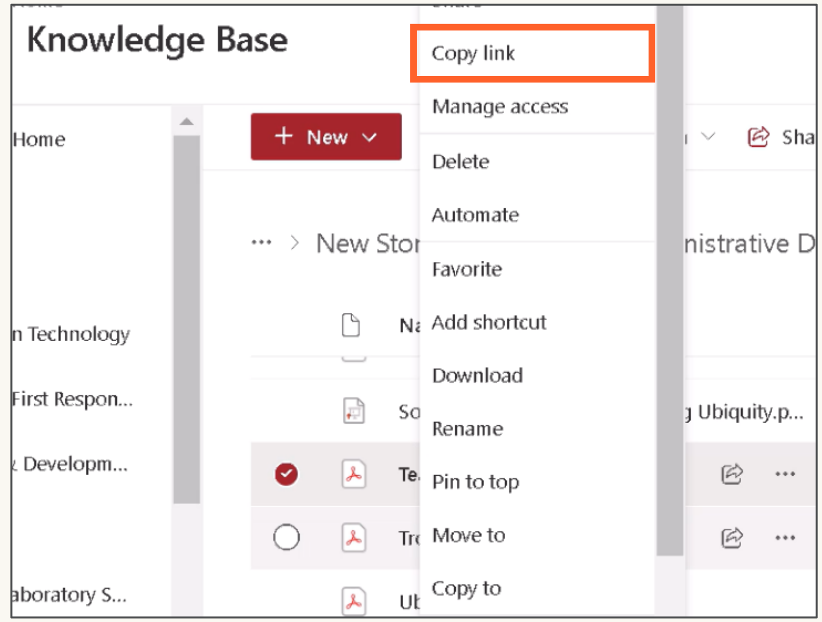
- Any training documents, reference material, or databases stored in SharePoint should ***NOT*** be downloaded.
  - You are encouraged to bookmark / favorite these files in your web browser for future reference.
  - As updates are made to these files, any downloaded versions become outdated.
- When sharing training documents, reference material, or databases stored in SharePoint, do ***NOT*** include the file as an attachment in emails or Teams messages. This creates unnecessary file duplication.
  - Instead, copy the link to that file to include in your communications.
- Do ***NOT*** make updates to files you do not own. Instead, submit update requests to LM1Training@optum.com or the file owner.
- If sharing files from a private Teams channel, respond to access request emails you receive to ensure your co-workers can review material in a timely manner.
- When sharing files from a private Teams channel, double check that you have the proper Edit, View, & Read permissions set for team owners, guests, & visitors.
- Do not share workflow, database, or policy files from your personal Optum OneDrive account.
  - This will create file access issues should you decide to leave the company.

## File Link Sharing

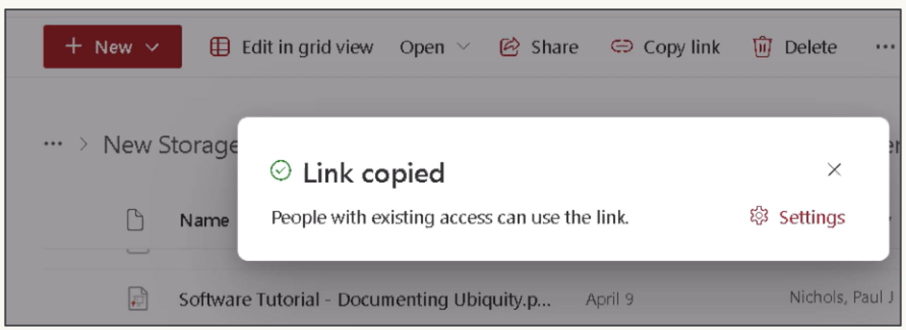
1. Locate the file on SharePoint

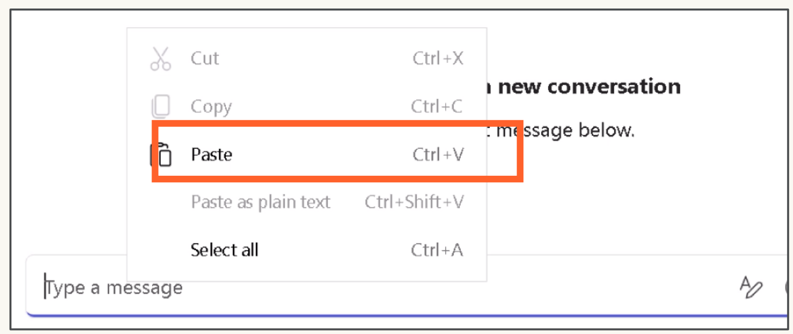



2. Right-click on the file and choose the “Copy Link” option.




3. Once SharePoint confirms the link has been copied to your clipboard, you may paste it into emails or Teams messages.



# Attendance & PTO Reporting

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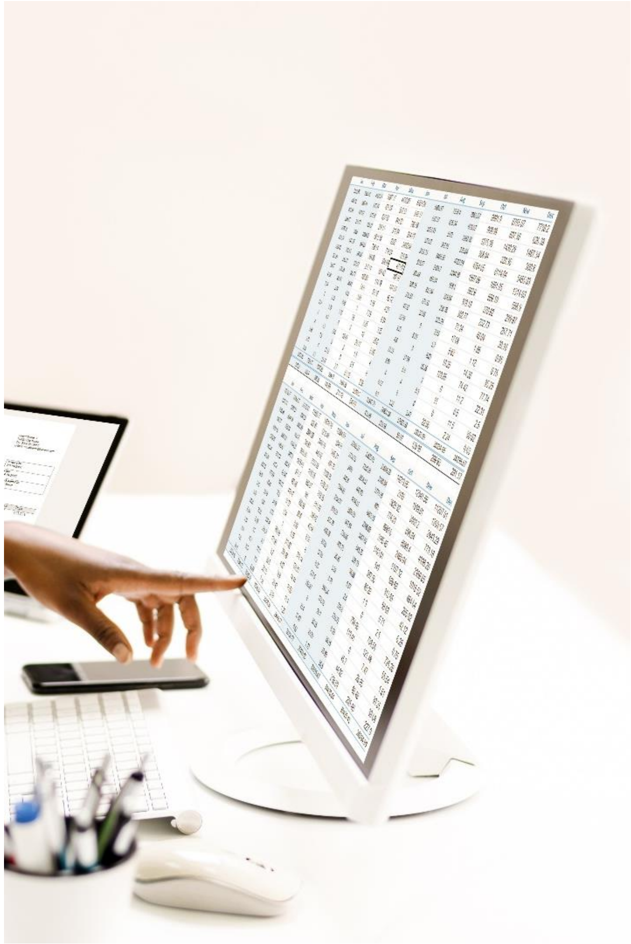
### Adding the Attendance Lines as Contacts

The voice and text message attendance lines should be added as ***SEPARATE CONTACTS*** on your phone. If you text the voice line, your message will not be received by the system. Calling the text line will result in a busy signal.

### Employee Identification

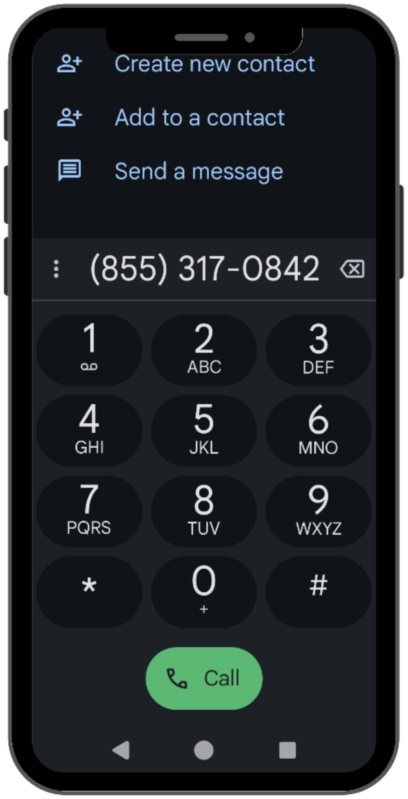
When reporting absences to the ***BOTH*** voice and text message attendance lines, your unique 9-digit employee ID must be provided to the automated system. If you do not know your 9-digit employee ID, consult your employee information in GSS.



# Report an Absence

## How to Call the Attendance Line (IVR)

1. Call: ***(855) 317-0842*** (add this contact to your phone for future use).
2. Use the keypad to your 9-Digit employee ID when prompted.
3. Follow the automated prompts to complete your submission. You must provide:
    - Date of Birth
    - Country
    - Time Zone
    - Confirm Time Zone Date & Time
    - Date of Absence
    - Full or Partial Day Absence
    - Reason for the Absence
    - Confirmation the Submission




## Alternate Responses

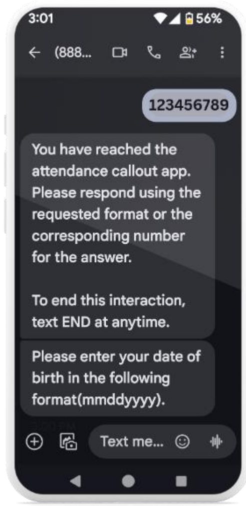
- After 2 missed attempts, you may enter your information using the keypad.
- If you do not provide your time zone after 90 seconds, you will be prompted to provide your country as an alternate.
- All call out options are enabled for "partial" start and end times.
- If using “military" time for PM call outs, the user would not be prompted for AM / PM options. Be sure to speak “military" time in the following format:

  For example, speaking *“Thirteen hundred.” Will be confirmed as 1:00 PM.*

## Contact the Attendance Line via Text Message

1. Text your 9-digit employee ID to:
   ***(888) 863-0090*** (save this contact)
2. Replies will prompt you for further information:
   a. Country
   b. Time Zone
   c. Confirm Time Zone time / date
   d. Date of Request
   e. Paid or Unpaid Absence
   f. Confirmation of Entry
   g. Submission Complete

1

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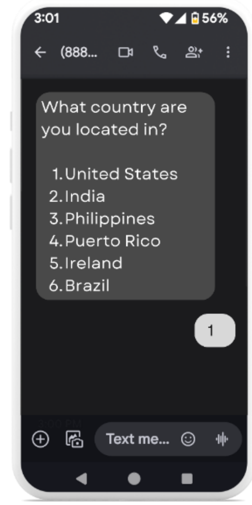
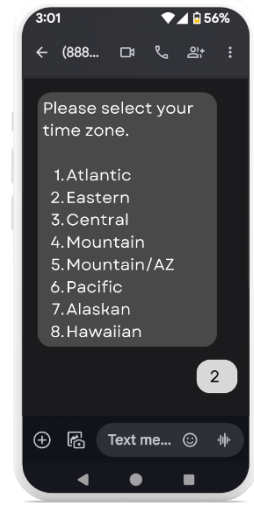



2b

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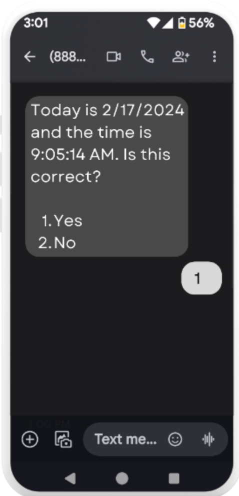


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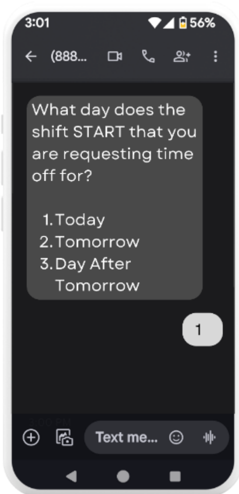
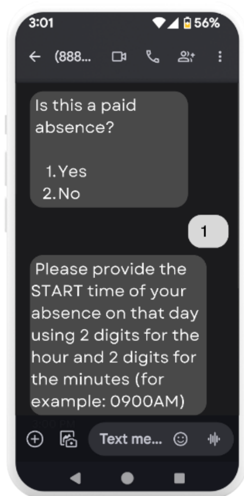
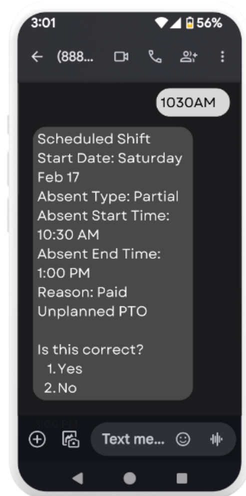


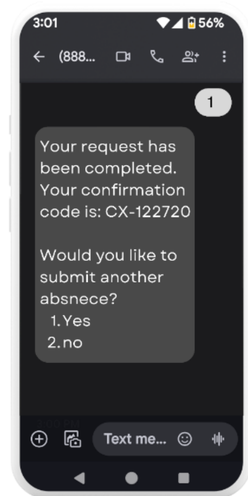

2e




Confirmation




Submission



## Error Messages

If the employee cannot be found in IEX:

> The entered date of birth does not match what is on file

> Please enter your 9-digit employee or contractor ID. Your Employee ID can be found on your electronic paystub

If the employee does not have a schedule in IEX:

> The requested time is not within the current schedule.
> Would you like to try again?
>
> 1. Yes
> 2. No

After 2 missed attempts of any response, or if the employee does not respond to the message within 90 seconds, the session will be ended:

> I did not receive a valid response. Would you like to continue? Please respond with the number of your response.
>
> 1. Yes
> 2. No

> Due to inactivity, your incomplete request has been closed. If you wish to try again, text your 9-digit employee ID to
> (888) 863-0090

***Alternate Absence Reporting***

*In the event you are unable to reach the voice or text message attendance lines, send an email to the LM1 Attendance Mailbox at:*

lm1attendance@optum.com

***Alternate DOB Entry***

*You can enter your birth date without the use of a "/" between numbers:*

*Format: MMDDYYYY*

*Example: 09271993*

***Alternate Replies***

*When given a prompt with predetermined responses, you may reply with the response itself, or with the number used to list it:*

## Submission Confirmation Email

The employee and supervisor will receive confirmation emails when successful absences are submitted via IVR or text message.

*Example: Absence Confirmation Email*

**Agent Callout - Justin Testor - 8/11/2023**

OmniChannel Attendance App <OmniChannelAttendance@cxone.c

To

Reply | Reply All | Forward

Wed 8/9/2023 2:39 PM

We could not verify the identity of the sender. Click here to learn more.

OmniChannel Attendance App Absence Confirmation

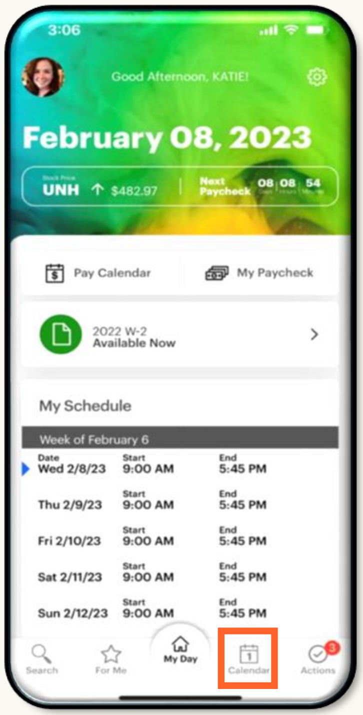
EmployeeId:999999124
Employee: Justin Testor
Absent Date:Friday, Aug 11
Absent Type: Full
Start Time:
Reason: Unpaid Unplanned UTO
Confirmation Code: CX-1000124

Thank you,
OmniChannel Attendance App

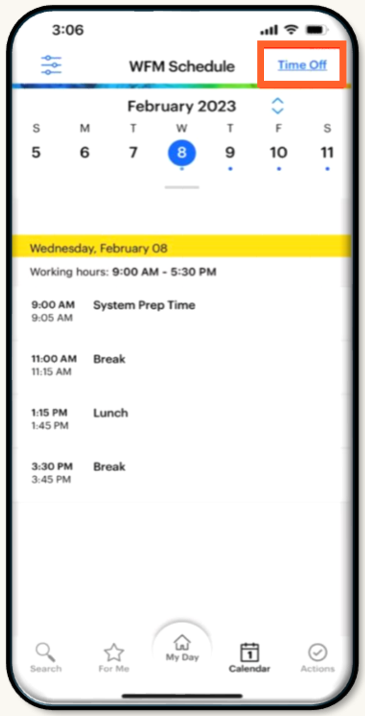
# Submit a PTO Request Using the Sparq Application

## Planned PTO

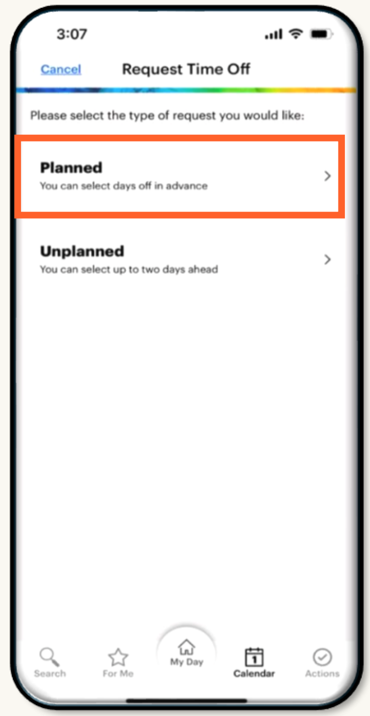
1. Select "Calendar" from the list of tabs at the bottom of the screen:



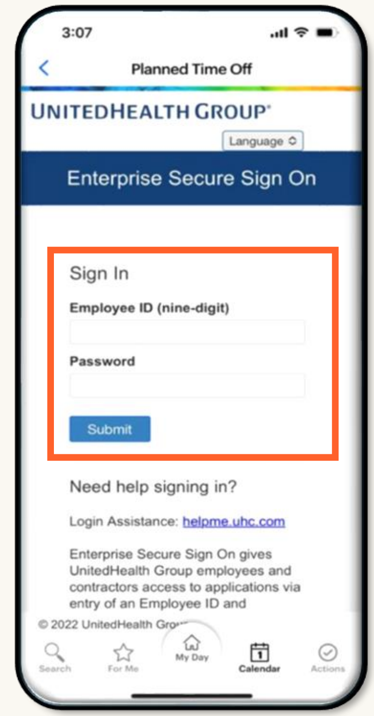

2. Select the "Time Off" option in the upper-right corner of the screen:




3. Select the "Planned" option:

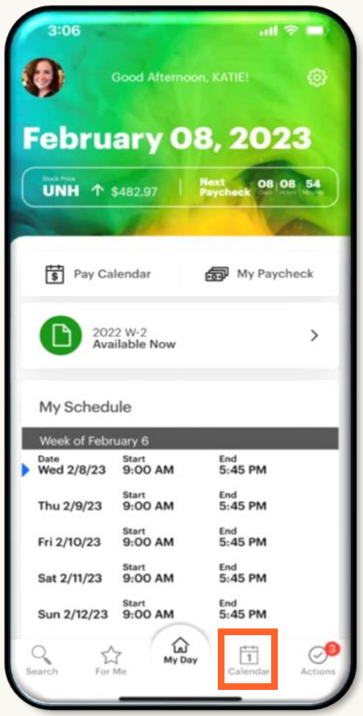



4. Login to IEX Web Station and complete the PTO request form:

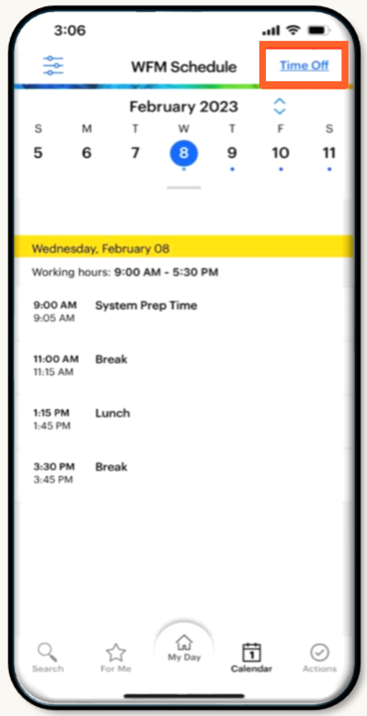


## Unplanned PTO

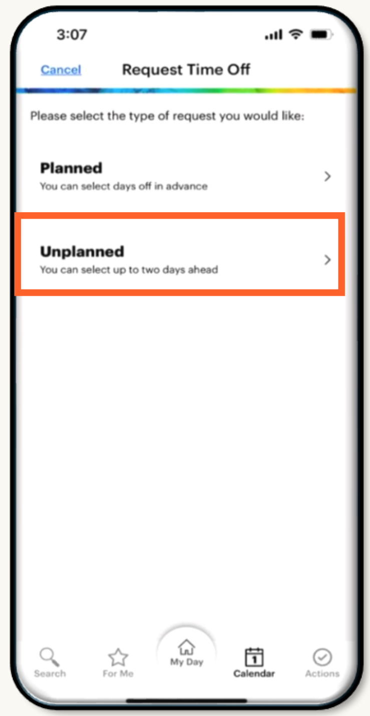
1. Select “Calendar” from the list of tabs at the bottom of the screen:



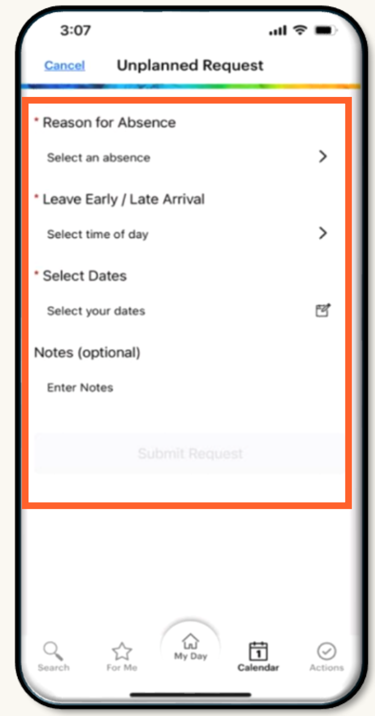

2. Select the “Time Off” option in the upper-right corner of the screen:




3. Select the “Planned” option:

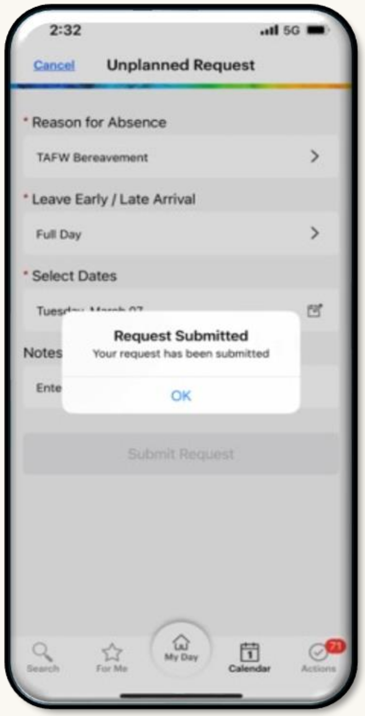



4. Fill in the requested information and then tap “Submit Request”:

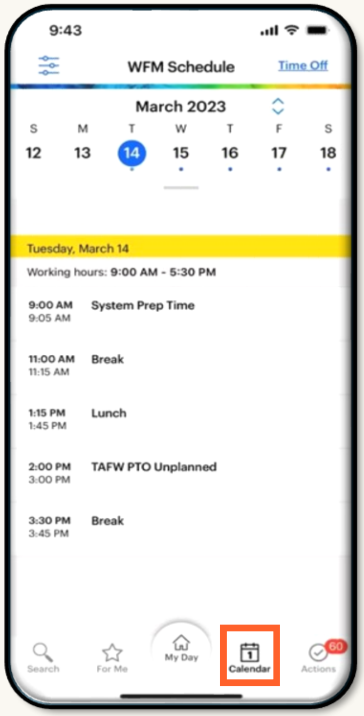



**This workflow is continued on the next page.*

5. A confirmation message will inform you of a successful submission:




6. If approved, your PTO will appear under "My Schedule" from the "Calendar" view of Sparq:




*This workflow is continued on the next page.*

7. You will also receive a confirmation email to indicate whether your PTO request was approved or denied:

*Example: PTO Confirmation Email*

New Sparq Callout - [redacted] (AUTO EMAIL - DO NOT REPLY)

US

uhgsparqcalloutnotification@optum.com

To [redacted]

Reply | Reply All | Forward | ...

Fri 3/10/2023 2:31 PM

Retention Policy UHGInbox (90 days) Expires 6/8/2023

We removed extra line breaks from this message.

Start your reply all with: Thank you! | Got it, thanks! | Received, thank you. | Feedback

**THIS IS AN AUTOMATICALLY GENERATED EMAIL SENT FROM SPARQ. PLEASE REACH OUT TO YOUR WORKFORCE FOR ANY QUESTIONS OR CONCERNS.**

You have submitted a new callout through the Sparq mobile app.

Details:

Employee: [redacted]
Employee ID: [redacted]
Notes:
Length: Partial Day
Code: TAFW FMLA Intermittent
Date: 2023-03-12 01:30 to 2023-03-12 05:55 UTC Date Initiated: 2023-03-10 20:31 UTC Confirmation Code: 133

**Please do not reply to this automated message.

## About IEX Web Station

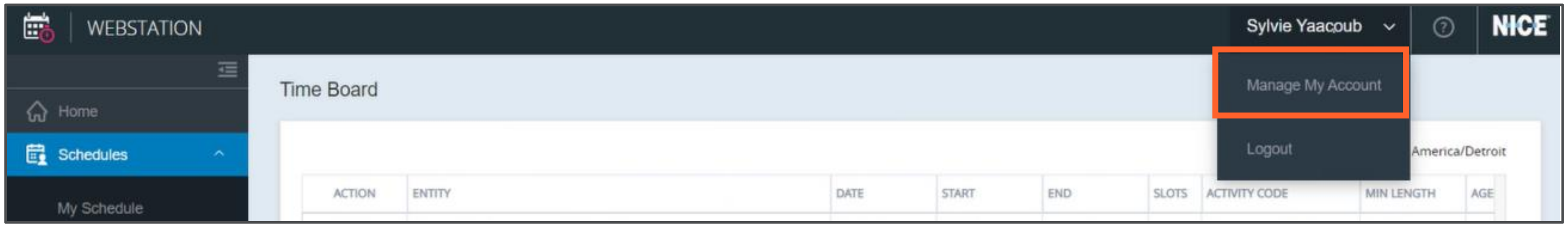
At the start of each workday, you are expected to open [IEX web station] and run it in the background while completing other tasks. IEX is a real-time tracking software to coordinate breaks, lunches, holidays, and PTO with the rest of your team.

Managers & Supervisors will coordinate updates in IEX with Workforce Management at: lm1_wfm@optum.com.

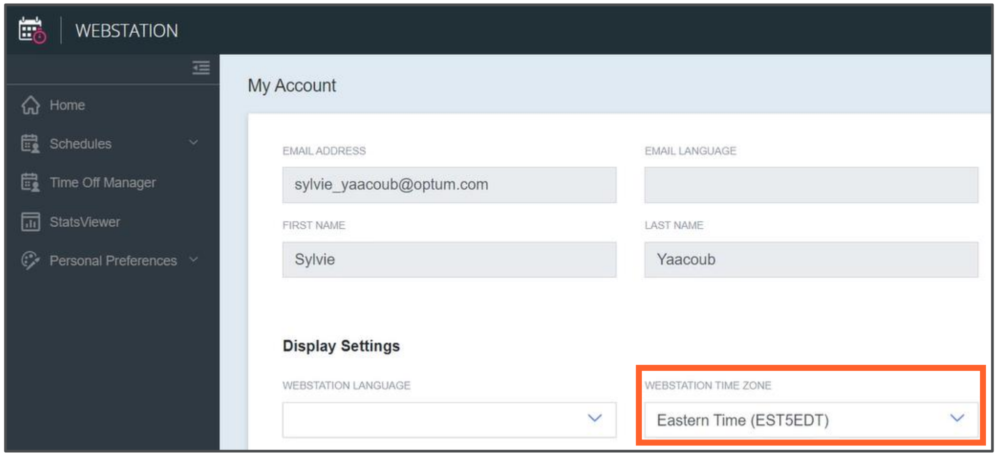
## Shift Overview IEX Web Station Tutorial

### Set Your Time Zone

1. Click on your name in the upper-right corner of the Web Station window.
   - Select the "Manage Account" option from the drop-down menu.

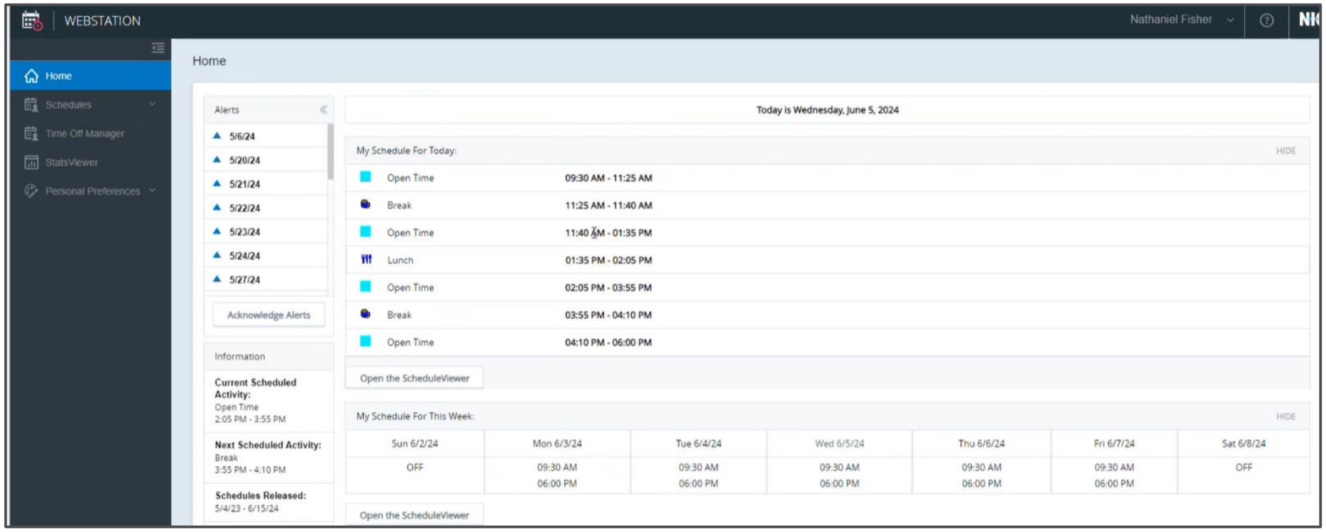



2. Change the Web Station Time Zone to match your own.

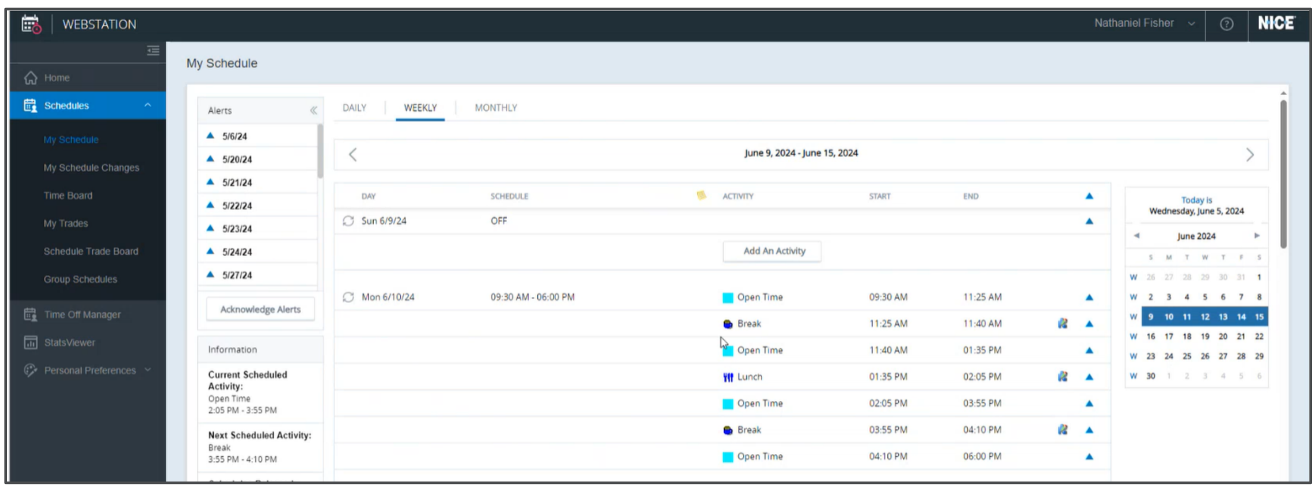


## View Your Schedule

An overview of your schedule, assigned break, and lunch can be reviewed from the Home tab:




Select “My Schedule” from the “Schedules” drop-down menu for a detailed view:

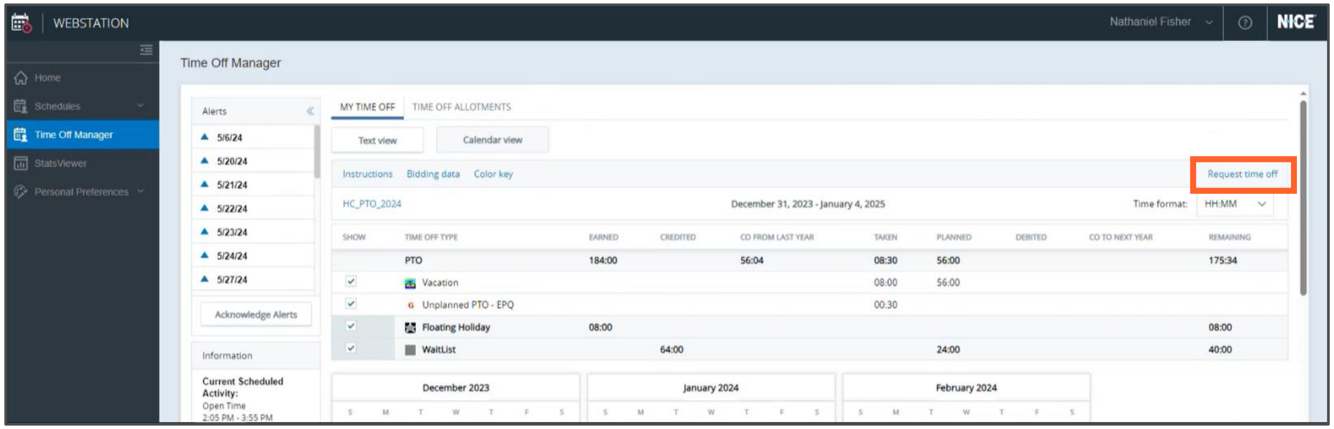


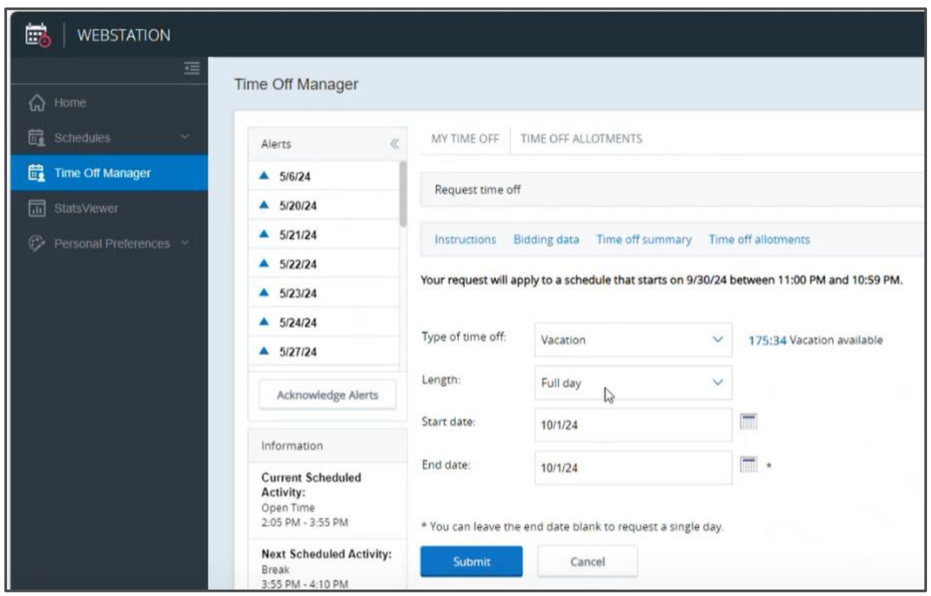

**Breaks & Lunch**

*To best coordinate call coverage for all employees on shift, breaks and lunches are pre-determined by Workforce Management.*

# PTO Requests in IEX Web Station Tutorial

To request PTO in the IEX Webstation portal, navigate to the “Time Off Manager” tab and select “Request Time Off”:




### PTO Request Approval

*The submission of a PTO request does **NOT** guarantee that it will be approved by Workforce Management.*

### Request Consideration

*PTO requests are considered on a first-come, first-serve basis. To increase the chance of request approval, submit your PTO requests as early as possible.*

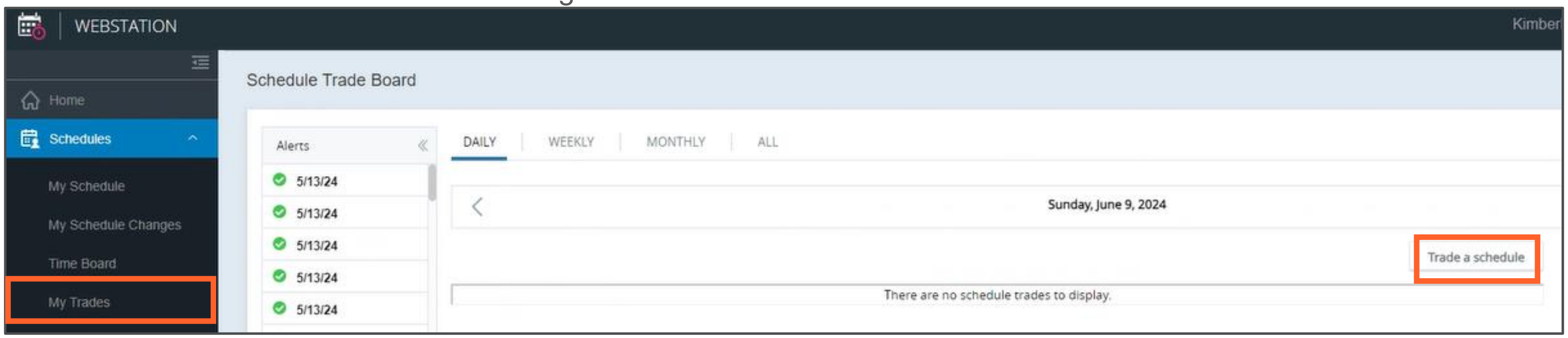
### Call Coverage

*We have made a commitment to our partners and patients to provide 24 hour service 7 days a week. PTO requests may be denied to ensure this coverage is accounted for.*

# Shift Swap IEX Web Station Tutorial

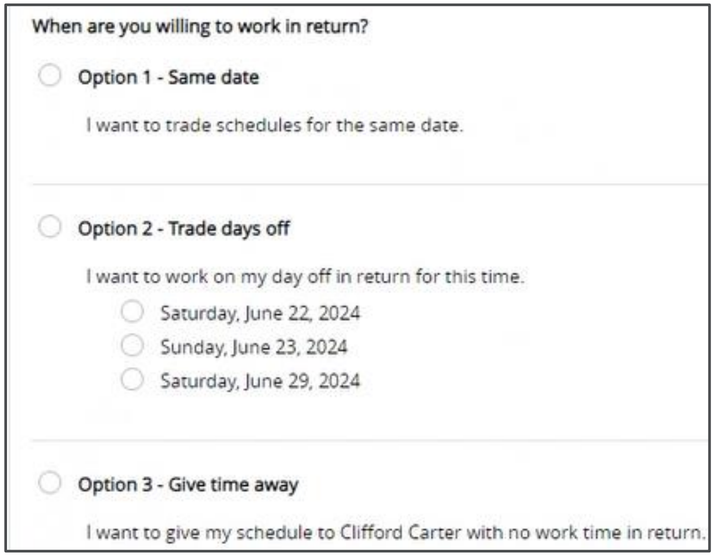
Open the IEX web station:

1. Select the “My Trades” option located under “Schedules” in the main menu.
2. Select “Trade a Schedule” located to the right of the window:




3. Complete the trade request form:
   - Enter the date of the shift you are trading.
   - You can trade your whole shift, or part of your shift.
     - For a partial day trade (minimum 2 hours), select “Trade part of the Schedule” and enter start and end times.
   - If you want to post a trade for anyone to choose; select “Open Trade”.
   - To trade with a specific individual, select “Trade with a Specific Agent”. Search and select the agent to continue.

4. Select your trade preferences under “What are you willing to work in return?”:
   - Option 1 – Same Date:
   - Option 2 – Trade Days Off:
   - Option 3 – Give Time Away.




5. Enter a Comment with the schedule trade request, if allowed by the trade rules.


6. Click Send My Request. The target agent must approve the trade.
   - The target agent receives an alert that a closed trade is pending approval.

***Partial Schedule Trade Time Listings***

*If you request a partial-schedule trade, enter the earliest start time and the latest stop time you want. If the trade rules do not allow different schedule length trades, the system hides the stop time field. These times are in your preferred time zone.*

## Open Trade

An Open Trade allows you to post a request on the Trade Board and everyone can view and sign up for your open shift.

Time Board

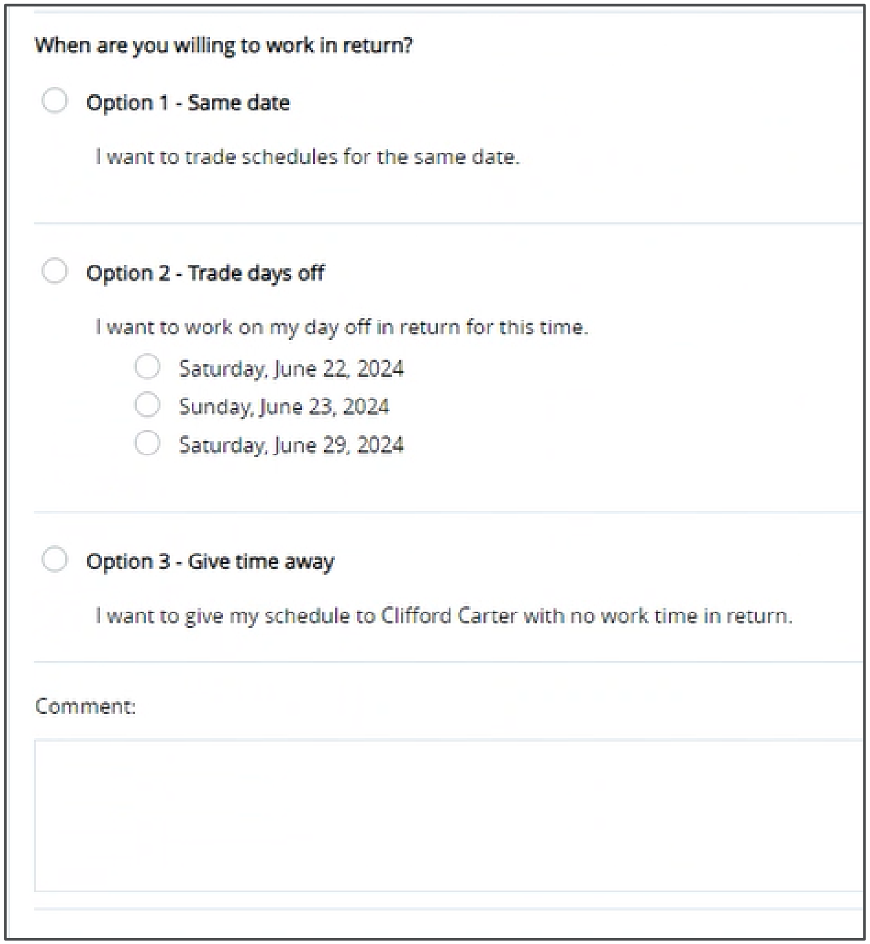
| ACTION | ENTITY | DATE | START | END | SLOTS | ACTIVITY CODE | MIN LENGTH |
|---|---|---|---|---|---|---|---|
| Sign Up | MU 7018 HC_WFM | 7/5/24 | 8:00 AM | 8:00 PM | 5 | $$ Additional Phone Hrs | 02:00:00 |
| Sign Up | MU 7018 HC_WFM | 7/3/24 | 8:00 AM | 8:00 PM | 5 | $$ Additional Phone Hrs | 02:00:00 |

If you selected an Open Trade, identify the desired schedule and select one of the following options:

1. A different start time on the same day.
2. Enter your preferred range of start times or select Any time.
    - These times are in your time zone.
3. Select at least one of the checkboxes for a longer, the same length, or shorter schedule.

If requesting a different day off:

1. Select the day or days you would work.
2. Enter your preferred range of start times or select "Any Time". These times are in your preferred time zone.
3. If your preferred time zone is not your MU's time zone, the "Any Time" option is not available.
4. Select at least one of the checkboxes for a longer, the same length, or shorter schedule, if allowed by the trade rules.



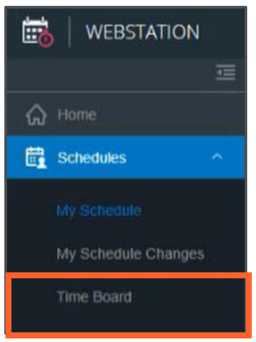

Give the schedule away for nothing in return, if allowed by the trade rules:

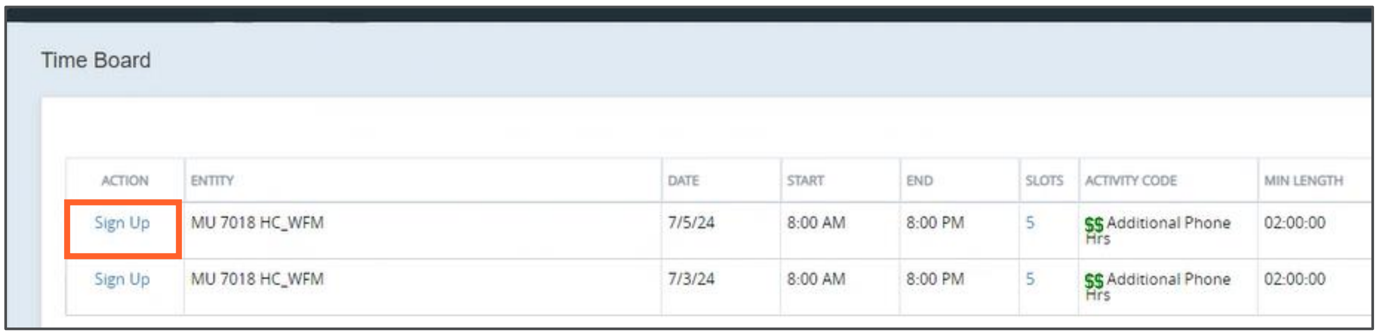
1. (Optional) Enter a Comment with the schedule trade request, if allowed by the trade rules.
2. Click "Send My Request" to add the trade to the schedule trade board.

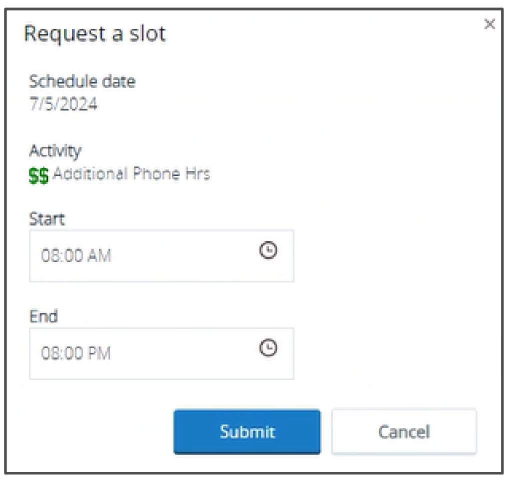
When another agent selects your trade, the system validates and processes it as defined by the trade rules.

## Shift Pick-Up IEX Web Station Tutorial

1. Open the IEX web station:
2. From the left-side menu, select “Schedules” and choose “Time Board” from the expanded options:
3. This will open the Time Board.
   - A list of available shifts will appear with displayed start and end times.
   - Click “Sign Up” for any shifts you want to pick up.




4. Use the “Request a Slot” pop-up window to enter the specific times you would like to sign up for:
   - Select “Start” and “End” time in two-hour increments.
   - Click “Submit” to complete the Sign Up process.
   - Approved time will appear in your IEX schedule.

## Alternate Communication

If you are unable to access IEX, please send shift coverage requests to the following email: lm1_wfm@optum.com.

## Schedule Change Requests

To request that your schedule be permanently changed to a different shift time, please send an email to: lm1_wfm@optum.com.

## Request Additional Information

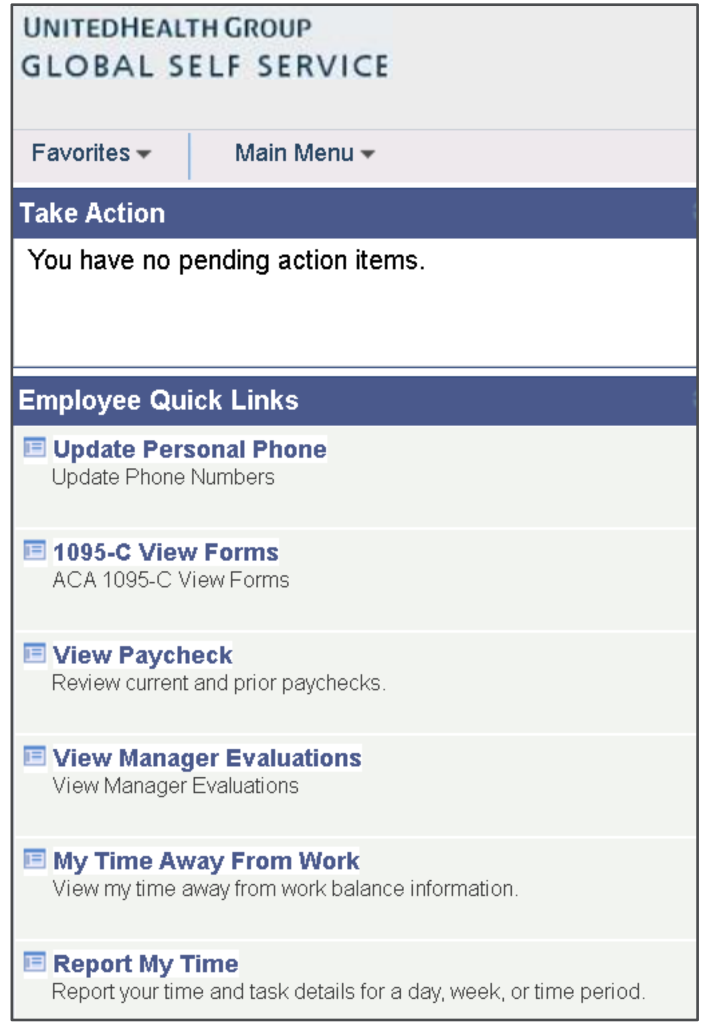
Please submit any questions regarding the shift swap guidelines or coverage requests to the Workforce Management Team email: lm1_wfm@optum.com.

## Escalated Assistance

To receive assistance for escalated concerns after business hours, please call: (657) 502-6777

# Time Reporting in Global Self Service (Non-Exempt Employees)

Non-exempt employees are expected to report their hours worked in [Global Self Service (GSS)]() at the beginning and end of their workday. To ensure accurate reporting, Managers or supervisors are expected to compare timesheets to status reports in Genesys and Teams activity.




## Quick Links

The Global Self Service landing page will present the user with a list of quick links to easily access the following resources:

- ***View Paycheck*** will display current and past paychecks the employee has earned.
- ***My Time Away From Work*** will allow the user to see their current PTO balance along with a history of PTO they have taken.
- ***Report My Time*** will direct the user to the current pay period timesheet to enter hours worked.

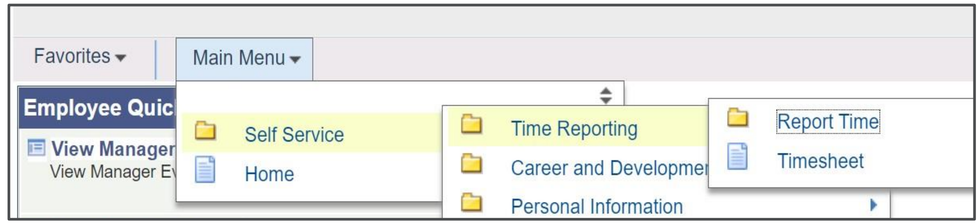
Additional resources may be accessed from the Main Menu located above the Quick Links section. Some useful resources include:

- ***Self Service > Personal Information > My Employee Information*** will allow the user to view their 9-Digit Employee ID and base pay.
- ***Payroll & Compensation > Direct Deposit*** offers the user the opportunity to set up direct deposit to one or more accounts.

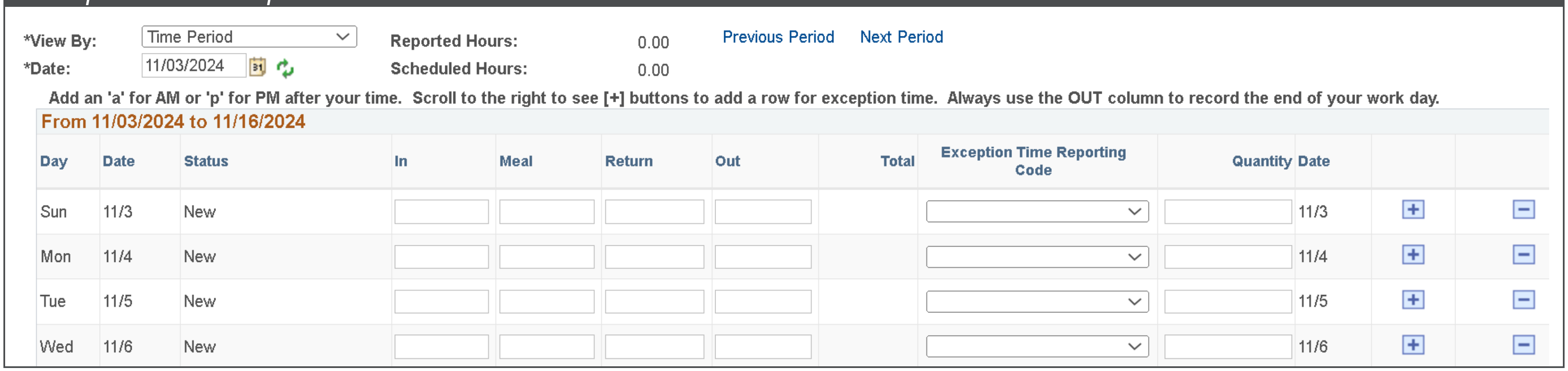
Any pending tasks, such as employee evaluations, will be listed at the top of the landing page.

## Timesheet

The Timesheet can be accessed from the Quick Links menu or by navigating to ***Main Menu > Self Service > Time Reporting > Timesheet***. This will direct the user to the timesheet for the current pay period.




*Example: Non-Exempt Timesheet*




- ***In*** indicates your arrival time to work.
- ***Meal*** indicates the start of your lunch or meal break.
- ***Return*** indicates your return from your lunch or meal.
- ***Out*** indicates your departure time from work.
- ***Exception Time Reporting Code*** provides the user with PTO / Unpaid Time Off codes or categories of leave.
- ***Quantity*** specifies the number of hours taken for PTO / Unpaid Time Off, or Leave.

## Time Reporting Examples

Use the [+] and [−] buttons to add or subtract rows as needed:

- Submit your time entry when complete.

*Example: Standard Shift Entry*

| Day | Date | Status | In | Meal | Return | Out | Exception Time Reporting | Quantity | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Sun | 10/11 | New | 8:30a | 12:30p | 1:00p | 5:00p | | | + | − |
| Mon | 10/12 | New | | | | | | | + | − |
| Tues | 10/13 | New | | | | | | | + | − |

*Example: Overnight Shift Time Entry*

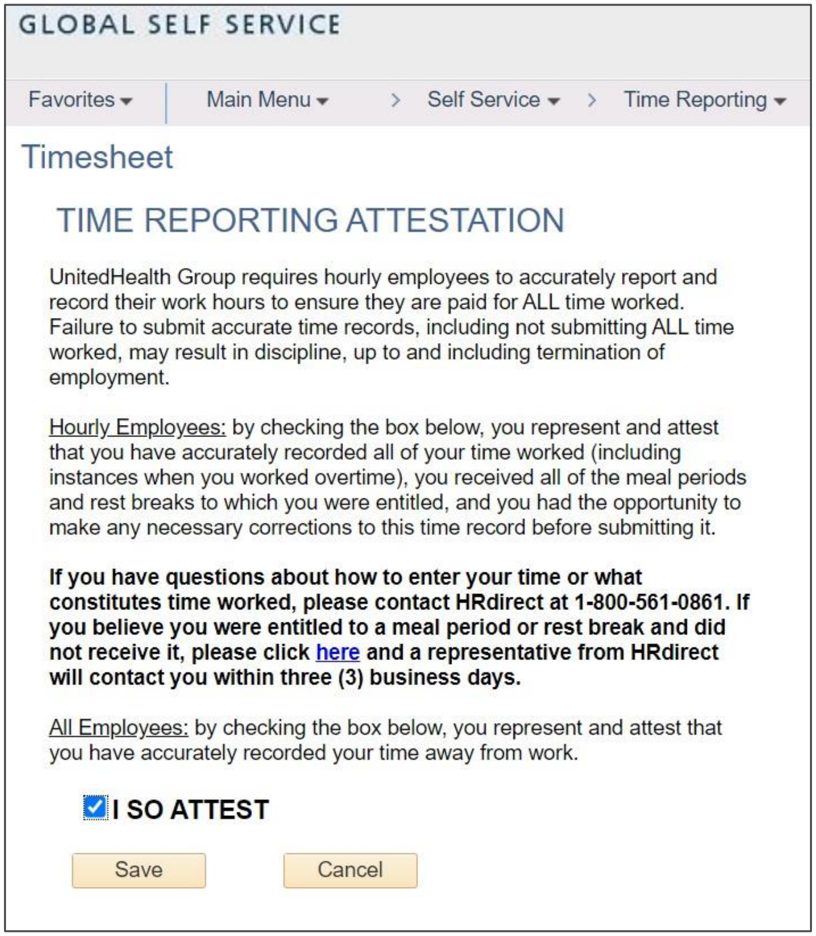
| Day | Date | Status | In | Meal | Return | Out | Exception Time Reporting | Quantity | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Sun | 10/11 | New | 8:30p | | | 11:59p | | | + | − |
| Mon | 10/12 | New | 12:00a | 12:30a | 1:00a | 5:00a | | | + | − |
| Tues | 10/13 | New | | | | | | | + | − |

| *Example: Full 8-Hour Shift PTO Reporting* | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Day | Date | Status | In | Meal | Return | Out | Exception Time Reporting | Quantity | | |
| Sun | 10/11 | New | | | | | Planned PTO - PPT | 8 | + | − |
| Mon | 10/12 | New | | | | | | | + | − |
| Tues | 10/13 | New | | | | | | | + | − |

| *Example: Partial PTO Reporting* | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Day | Date | Status | In | Meal | Return | Out | Exception Time Reporting | Quantity | | |
| Sun | 10/11 | New | 8:30a | | | 12:30p | | | + | − |
| | | New | | | | | Planned PTO - PPT | 4 | + | − |
| Tues | 10/12 | New | | | | | | | + | − |

## Time Entry Attestation

After submitting your time, you will be asked to complete an attestation to confirm the accuracy of your report.



GLOBAL SELF SERVICE

Favorites ▾ | Main Menu ▾ > Self Service ▾ > Time Reporting ▾

Timesheet

TIME REPORTING ATTESTATION

UnitedHealth Group requires hourly employees to accurately report and record their work hours to ensure they are paid for ALL time worked. Failure to submit accurate time records, including not submitting ALL time worked, may result in discipline, up to and including termination of employment.

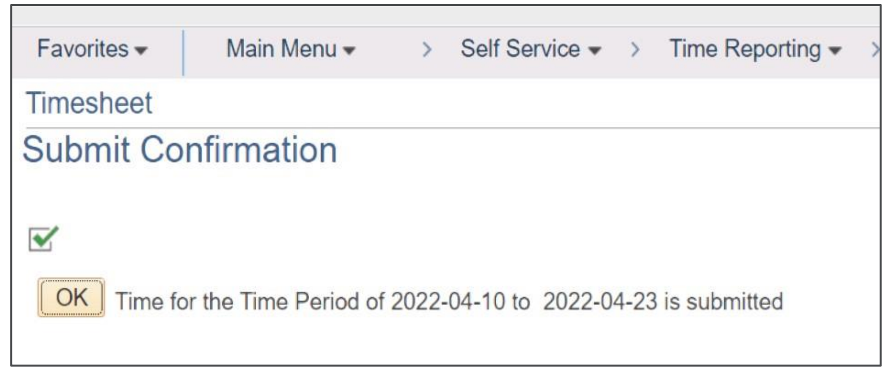
Hourly Employees: by checking the box below, you represent and attest that you have accurately recorded all of your time worked (including instances when you worked overtime), you received all of the meal periods and rest breaks to which you were entitled, and you had the opportunity to make any necessary corrections to this time record before submitting it.

**If you have questions about how to enter your time or what constitutes time worked, please contact HRdirect at 1-800-561-0861. If you believe you were entitled to a meal period or rest break and did not receive it, please click here and a representative from HRdirect will contact you within three (3) business days.**

All Employees: by checking the box below, you represent and attest that you have accurately recorded your time away from work.

**I SO ATTEST**

Save Cancel



Favorites ▾ | Main Menu ▾ > Self Service ▾ > Time Reporting ▾ >

Timesheet

Submit Confirmation

OK Time for the Time Period of 2022-04-10 to 2022-04-23 is submitted

***Time Reporting Accuracy***

*Your timesheet should reflect your actual time worked as accurately as possible. For example, if you arrived to work at 8:04 AM, that is the time you would enter, **NOT** 8:00 AM*

# Compliance Standards

## Table of Contents



## HIPAA & Compliance Resource Links

3 Patient Identifier Verification Procedure

This procedure details current standards for patient identification during calls.

Valid Verbal Consent Job Aid

This job aid describes the process of adding contacts to the patient's chart while obtaining valid verbal consent to release general PHI during interactions.

# Patient Verification Job Aid

Use the following guidelines to complete patient verifications at the start of incoming calls:

- Within Landmark First, it is considered best practice to request the patient's full name, date of birth, and address to fulfill HIPAA identification requirements during calls. Other forms of identification listed below may be used, if necessary.

### 1

**Request The Patient's First / Last Name**

The caller should provide the patients first and last name. Ask for specific spelling as necessary.

### 2

**Obtain HIPAA Identifier #1**

Ask the caller to provide the patient's:

- Full Date of Birth
- Full Phone Number
- Full Address

### 3

**Obtain HIPAA Identifier #2**

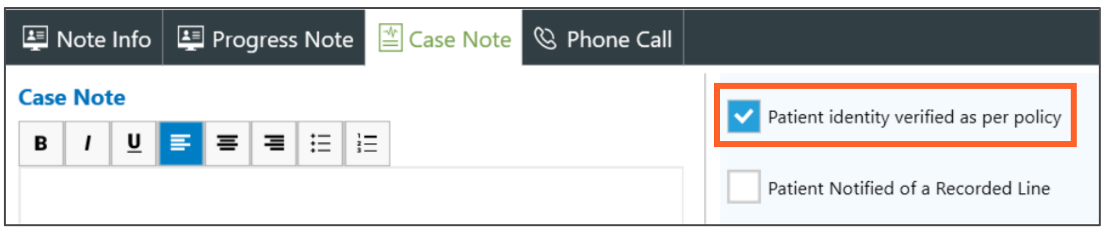
Ask the caller to provide the patient's:

- Full Phone Number
- Full Address
- Health Plan / Member ID

### 4

**Confirm Patient Identity Verification in Ubiquity**

If the patient's full name and two HIPAA identifiers are confirmed by the caller, check the "Patient identity verified as per policy" confirmation box in your Ubiquity documentation.



## Caller Authorization Job Aid

Once the patient’s chart has been verified, the caller’s authorization status must be confirmed.

- ***DO NOT*** assume that the caller is the patient. Ask the caller to identify themselves and their relationship to the patient. Review the chart to verify the caller’s information.
- The caller’s information, relationship to patient, and authorization status should be shared with company staff during call transfers / warm handoffs.

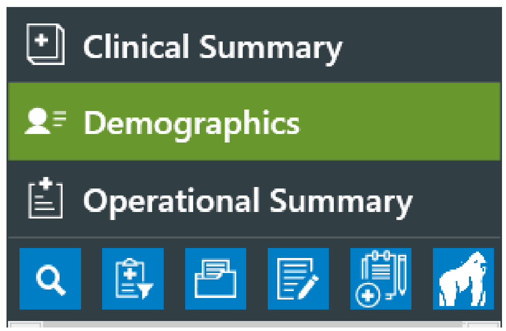
### 1

Check the “Alerts” and “Patient Notes” in the Clinical Summary


Authorized callers may appear in the “Alerts” or “Patient Notes” section of the patient’s chart in the “Clinical Summary” section.

### 2

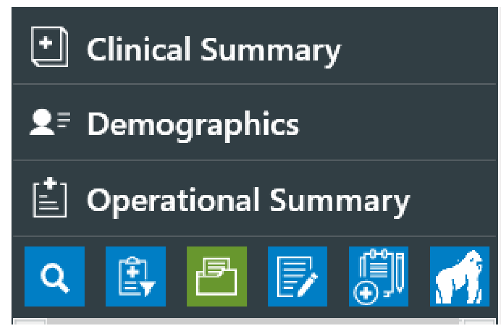
Check for Contacts Listed in the Chart’s “Demographics” Section




Contacts may be listed in the “Phone Numbers” or “Contacts” section of the “Demographics” section of Ubiquity. The patient’s Primary Care Provider (PCP) will also be listed here.

### 3

Check for Signed Uploaded Consent documents




The patient may have a Health Care Proxy, Durable Power of Attorney, or other authorized contact listed in uploaded consent documents.

## Valid Verbal Consent Job Aid

If an unauthorized caller requests the patient's Protected Health Information (PHI), valid verbal consent must be obtained from the patient or the patient's legal representative. If valid verbal consent is granted, the contact can be added to the patient's chart:

### 1

**Inform the caller that Authorization is Required**

Inform the caller that the patient will need to provide valid verbal consent before you can release the requested PHI.

Ask if they are with the patient, and if so, is the patient available to provide authorization?

*Suggested Script*

*"Unfortunately, I am unable to provide that information as you are not listed as an authorized contact on the patient's chart. If the patient is with you, are they available to complete a brief authorization?"*

### 2

**Verify the Patient's Identity**

If the patient joins the call, ask them to confirm their first name, last name, and two of the following:

- Full Date of Birth
- Full Address
- Full Phone Number
- Health Plan / Member ID

*Suggested Script*

*"Thank you for taking the time to speak with me. Before I can authorize a new contact on your chart, or provide them any information, I need to verify your identity."*

### 3

**Request Valid Verbal Consent**

Once the patient is verified, request the following information:

- Contacts Name
- Relationship to Patient
- Phone Number
- One-Time or Ongoing Authorization

If ongoing authorization is granted, inform the patient that you will add the requested contact to their chart for future reference.

*Suggested Script*

*"Thank you for that information, may I speak to (caller's name) on your behalf?"*

*"Thank you, I have added their information to your chart, but you can call and update this information at any time.*

## 4

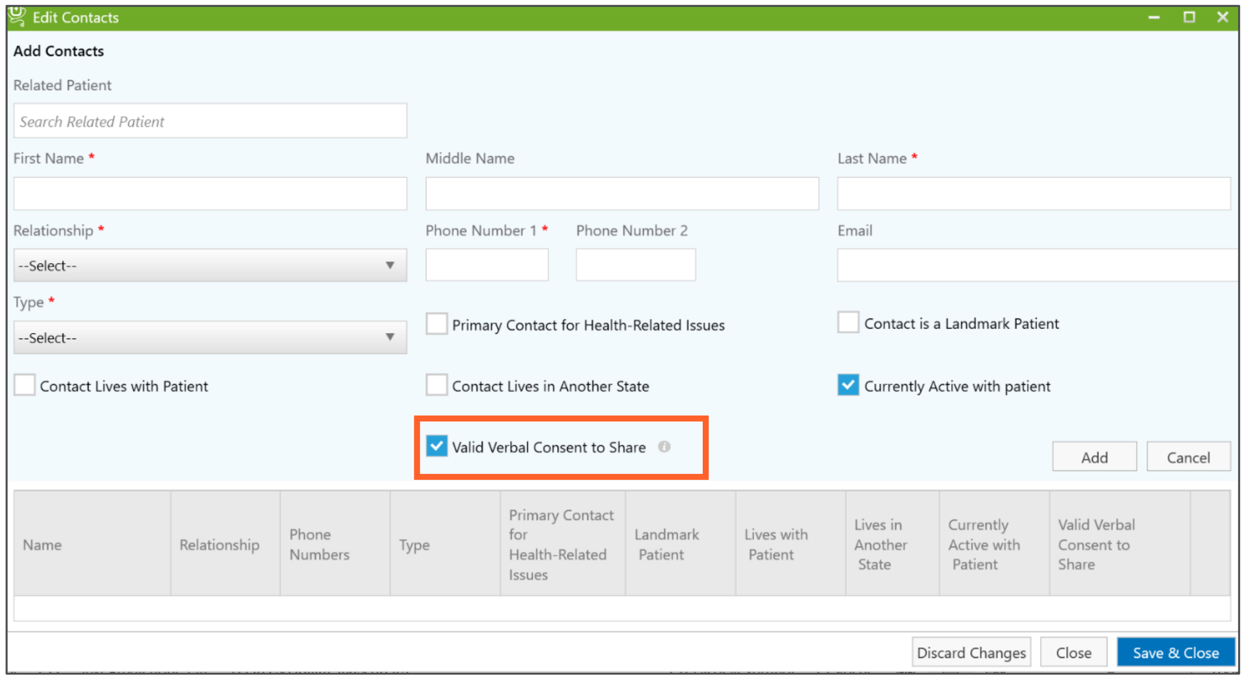
### Update the Contact Information in the Patient’s Chart

Navigate to the “Demographics” section of the patient’s chart and click the “edit” button to the right of the “Contacts” category.

- Use the pop-up window to add the new authorized contact
- Check the “Valid Verbal Consent to Share” option

Fill in the contact’s information and click “Add”

You can also use the pop-up window to edit or remove existing contacts.

## Protected Health Information (PHI) Disclosure Job Aid

Reference the table below to determine what PHI can and cannot be shared with authorized callers:

| PHI that ***CAN*** be Disclosed to Authorized Callers | PHI that ***CANNOT*** be Disclosed to Authorized Calles |
|---|---|
| • Updates pertaining to patient's overall status for care coordination.<br>• Information relevant to scheduling appointments for the patient.<br>• Dates of service or dates of payments.<br>• Application forms on behalf of the patient. | • The authorized contact cannot request written PHI to be sent to the contact or another person.<br>• An authorized contact cannot use verbal consent to change / update patient information.<br>• Authorized contact cannot approve the sending unsecured PHI on behalf of the patient and/or legal representative |

## Unauthorized Contacts Job Aid

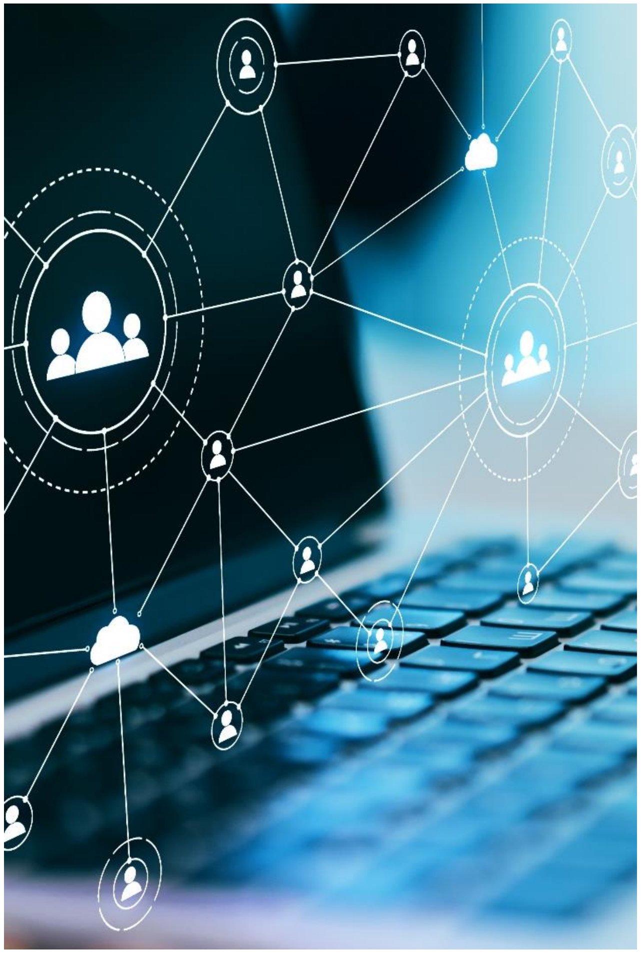
Please see the following ***EXAMPLES*** to help determine who can and cannot be the subject of a valid verbal consent and added to the patient's chart. Unauthorized callers ***CANNOT*** receive any Protected Health Information of any kind.

| Who ***CAN*** be authorized to receive PHI? | Who ***CANNOT*** be authorized to receive PHI? |
|---|---|
| • Patient's Family, Friends, Neighbors<br>• Legal Representatives / Durable Power of Attorney (check uploaded consent forms)<br>• Emergency Contacts<br>• Other contacts the patient may verbally confirm as authorized | • Community providers, social workers, or home health aides<br>• Pharmacies, rehabilitation facilities, surgical centers<br>• Transportation, delivery, or meal services |

# LM1 Call Transfer Guidelines

## Table of Contents





## General Transfer Guidelines

When considering call transfers, remember that each incoming call is recorded for quality assurance. Do not say anything during a call transfer that you would not want the quality assessment team, your supervisor, or a legal team to hear.

For this reason, ***DO NOT*** discuss the following during the handoff process:

- ***DO NOT*** describe the patient as rude or annoying.
- ***DO NOT*** comment on the frequency of the caller's attempts to contact us in a demeaning or derogatory manner.
- ***DO NOT*** engage in small talk, gossip, or use this time to catch up with co-workers.
- LM1 PCCs ***CAN NOT*** provide medical advice of any kind.

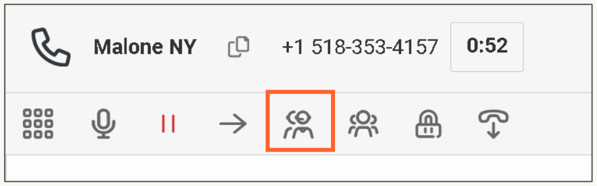
During transfers, conversation should be care-focused.

### Voicemails

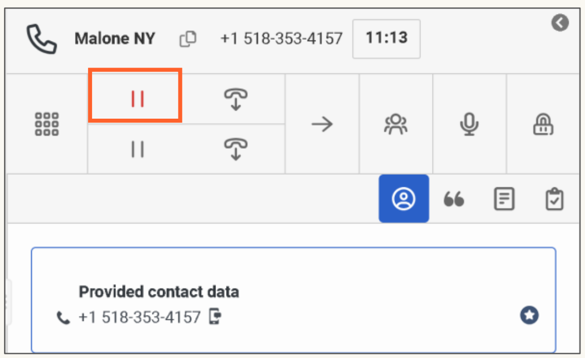
If calling a queue, clinician, or staff member to complete a call transfer, ***DO NOT*** leave a voicemail if prompted. Instead, move to the next step in the call transfer workflow.

## Call Transfers in Genesys

### *Consult Transfers*

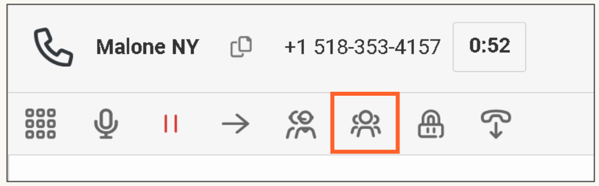



This is the most common transfer method as it allows employees to converse with each other regarding the caller’s concern prior to the call handoff.

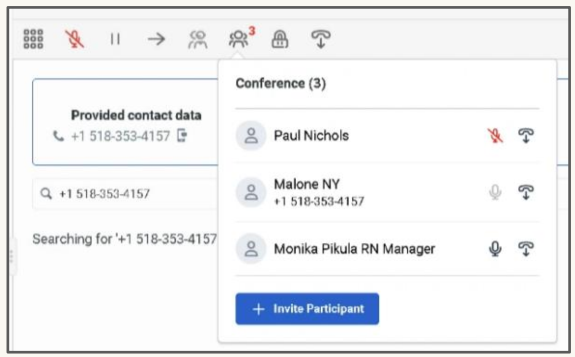



During the consult transfer, the original caller will be put on hold automatically; however, they can be taken off of hold by selecting the upper “Resume” button on the dashboard.

### *Conference Calls*

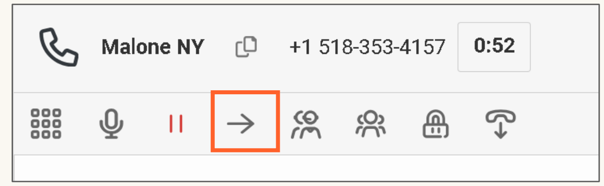



A conference call allows 3+ participants to participate and hear one another in real time. This is useful when conducting an interpreter line call transfer.

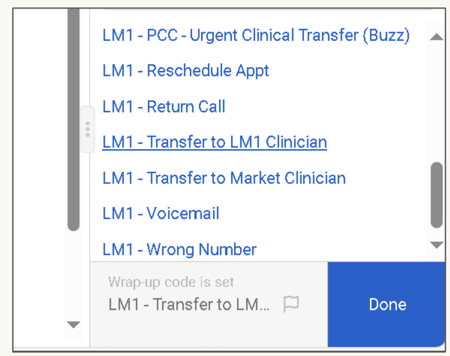



The conference dashboard allows the user to add multiple participants as well as mute or end the call with specific people.

### *Cold Transfers*




The cold transfer option should ***NEVER*** be used unless specified in a specific workflow as it will transfer a caller without any prior notice or conversation.




After selecting your cold transfer contact, the call will end.

## Call Transfer Step-By-Step Guide

| | ***Information Given***<br>*(Transfer Initiator)* | ***Response***<br>*(Transfer Recipient)* |
|---|---|---|
| 1. | The transfer initiator will introduce themselves and their role / job title. | The transfer recipient will introduce themselves and their role / job title. |
| 2. | Provide the patient's ID when prompted. | Provide the patient's state of residence and full name for verify the correct chart has been opened. |
| 3. | Confirm information provided and indicate whether the patient / caller has been HIPAA verified.<br>• Also indicate whether the caller is authorized. | Confirm understanding of information provided and request a summary of the caller's question, concern, or symptoms. |
| 4. | Provide a summary of the caller's question, concern, or symptoms. | Indicate readiness for transfer. |
| 5. | Transfer the call. | |

### Consult Transfer 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 credentialling.
- Before transfer, either party may pause to repeat verification steps as needed.

***ALL*** instances of incorrect patient identification, inaccurate chart documentation, or any inadvertent breaches of HIPAA disclosure should be escalated to a member of Landmark First's Leadership Team.

## Non-Eligible Members Expressing Medical Concerns

<table>
<tr><th>Urgent</th><th>Non-Urgent</th></tr>
<tr><td>

- Advise the caller to contact 911 or emergency services in their area.
  1. If the caller is unable to contact 911 on their own:
  2. Confirm the caller's location.
  3. Use the NENA 911 Database to locate the 24 x 7 emergency services number.
  4. Initiate a Conference call with a 911 dispatcher.

</td><td>

- Advise the caller that they are not eligible to receive Landmark services.
- Any inquiries of eligibility should be discussed with the caller's insurance provider. ***DO NOT*** guarantee eligibility.
- The caller should contact the phone number found on their insurance card for more information.

</td></tr>
</table>

***Eligible Patient Transfers***

*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.*

# Primary Contacts & Links Directory

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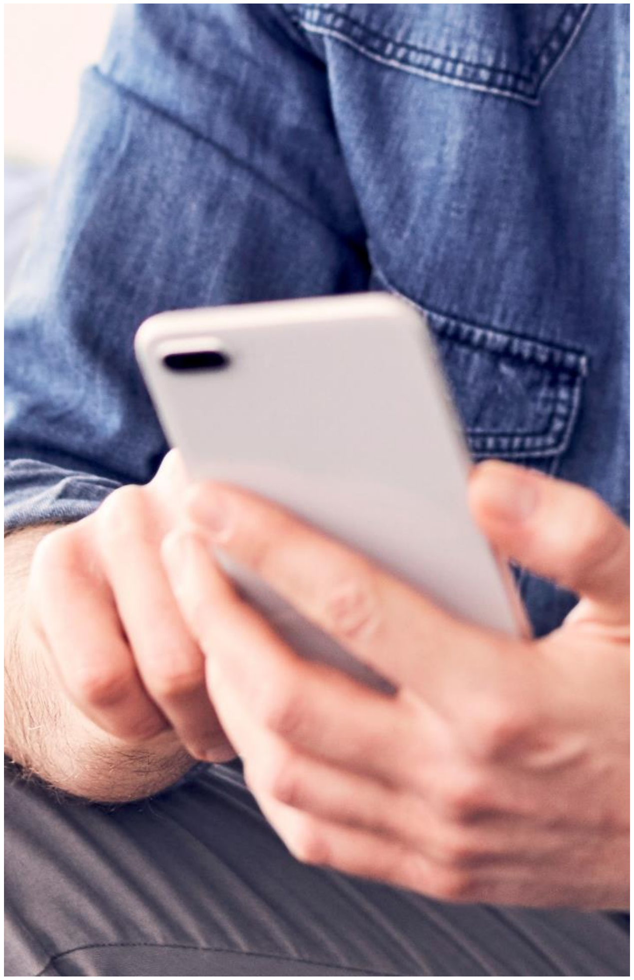

## Executive & Leadership

| Name: | Email: |
|---|---|
| Anessa Issa-Bazouzi<br>*National VP* | anessa.issabazouzi@optum.com |
| Karen Abrashkin, MD<br>*Sr. Medical Director* | karen.abrashkin@optum.com |
| Karla Durham<br>*Executive Director* | karla.durham@optum.com |
| Adrienne Moltz<br>*Associate Director* | adrienne.moltz@optum.com |
| TaShawn Wilson<br>*Market Standardization* | mailto:TaShawn_wilson@optum.com |

## Training, Implementation, & Quality

| Name: | Email: |
|---|---|
| Landmark Training Team<br>*Contact Training Team* | lm1training@optum.com |
| Lavor (Troy) Sanders<br>*LM1 Quality Lead* | lavor.sanders@optum.com |
| Paul Nichols<br>*Admin Training Specialist* | paul.nichols@optum.com |
| Sunni Kneeland<br>*Clinical Training Specialist* | sunni.kneeland@optum.com |

## UE Program

| Name: | Email: |
|---|---|
| Thomas Charlton<br>*National Medical Director Urgentivist Extenders* | thomas.charlton@optum.com |
| Stacy Hittner<br>*UE Manager* | stacy.hittner@optum.com |

## Workforce Management

| Name: | Email: |
|---|---|
| WFM Email<br>*Preferred Email* | lm1_wfm@optum.com |
| Karen Reynolds<br>Manager, Workforce Management | Karen.reynolds1@Optum.com |

## Clinical Management

| Name: | Email: |
|---|---|
| Taylor Spencer<br>*Division Medical Director* | taylor.spencer@optum.com |
| Katie Miner<br>*Division Medical Director* | kathryn.miner@optum.com |
| Alexa Gale<br>*Associate Medical Director* | alexa.gale@optum.com |
| Donald Locasto<br>*Associate Medical Director* | donald_locasto@optum.com |
| Mah- Fri Fomukong<br>*Associate Medical Director* | mah-fri_fomukong@optum.com |
| Jason Williams<br>*Associate Medical Director* | jason_williams@optum.com |

## Triage RN Management

| Name: | Email: |
|---|---|
| LM1 Triage RN Manager Email<br>*(Preferred Email)* | LM1TriageRNmanager@ds.uhc.com |
| Monika Pikula<br>*TRN Manager* | monika.Pikula@optum.com |
| An'gelique Spencer<br>*TRN Manager* | angeliquemoore.spencer@optum.com |
| Jen Stamp<br>*TRN Manager* | Jennifer.m.stamp@optum.com |

## Direct Clinical Supervision & Support

| Name: | Email: | Name: | Email: |
|---|---|---|---|
| Ashley Harris<br>*APC Team Lead* | ashley.harris1@optum.com | Maggie Berolo<br>*APC Team Lead* | maggie.berolo@optum.com |
| Francesca Yarnall<br>*APC Team Lead* | francesca.yarnall@optum.com | Michele Scarborough<br>*APC Team Lead* | michele.scarborough@optum.com |
| Heather Glass<br>*APC Team Lead* | heather.glass2@optum.com | Yasmin Hollowitz<br>*APC Team Lead* | yasmin.hollowitz@optum.com |

## PCC Management

| Name: | Email: |
|---|---|
| Betty Jackson<br>*PCC Manager* | betty.jackson1@optum.com |
| Courtney Maxwell<br>*PCC Manager* | courtney.maxwell@optum.com |

**Direct Supervisor Communications**

If you encounter an issue, concern, or wish to ask a workflow-related question while speaking with a caller, notify your direct supervisor in ***Microsoft Teams***.

## Direct PCC Supervision & Support

| Name: | Email: |
|---|---|
| Julissa Tejeda<br>*PCC Supervisor* | julissa.tejeda@optum.com |
| Kayla Robinson<br>*PCC Supervisor* | kayla.robinson1@optum.com |
| Monica Marshall<br>*PCC Supervisor* | monica.marshall@optum.com |
| Shenika (Monique) Butler<br>*PCC Supervisor* | shenika_butler@optum.com |
| Tricia Palmer<br>*PCC Supervisor* | tricia.palmer@optum.com |
| Racquel Kisack Tillman<br>*PCC Supervisor* | racquel.kisacktillman@optum.com |

## Company Website Directory & Support Links

Please refer to this directory to access company resources and references such as the Help Desk, websites by department, and communication aids.

### Employee Benefits Site

Link: http://benefitsenroll.uhg.com/

View and enroll in employee benefits for US employees.

### Employee Resource Center

Link: Visit the Employee Center

Phone: (800) 561-0861

### Collibra Glossary

Link: https://landmark.collibra.com/

A database of business-related terms and abbreviations used by Optum.

### IT / Help Desk

Link: https://secure.uhc.com

Submit a ticket via the Help Desk portal or call the Help Desk: (888) 848-3375

### Enterprise Now

Link: https://enterprisenow.optum.com

Visit this site to submit patient or employee complaints.

### Landmark First Home Page

Link: https://landmark.collibra.com/

A database of business-related terms and abbreviations used by Optum.

### Global Self Service (GSS)

Link: https://globalselfservice.uhg.com/

Fill and submit timesheets, see your PTO balance, paychecks, and review your employee information

### MyLearning

Link: https://uhg.edcast.com/

Complete required courses, assignments, and modules assigned to your profile.

### Safety Center of Excellence

Link: Open Website

Up-to-date HBMC Safety Zone information.

## Web Application Links

You will be required to use the following applications throughout your workday to complete job-related tasks.

| | |
|---|---|
| Genesys<br>Link: Click Here to Open Genesys<br>The primary application used to make and receive patient calls. | Humanity<br>Link: Click Here to Open Humanity<br>View shifts and schedules of On-Call market / metro providers offering additional patient support. |
| IEX Web Sation<br>Link: Click Here to Open IEX Web Station<br>Use to view your schedule, holidays, pick-up shifts, and request PTO. | NENA Emergency Phone Number Database (911)<br>Link: Click Here to Open NENA<br>Used to look up local emergency service numbers by address or ZIP code. |

![Optum]

# Troubleshoot Systems Issues Guidelines

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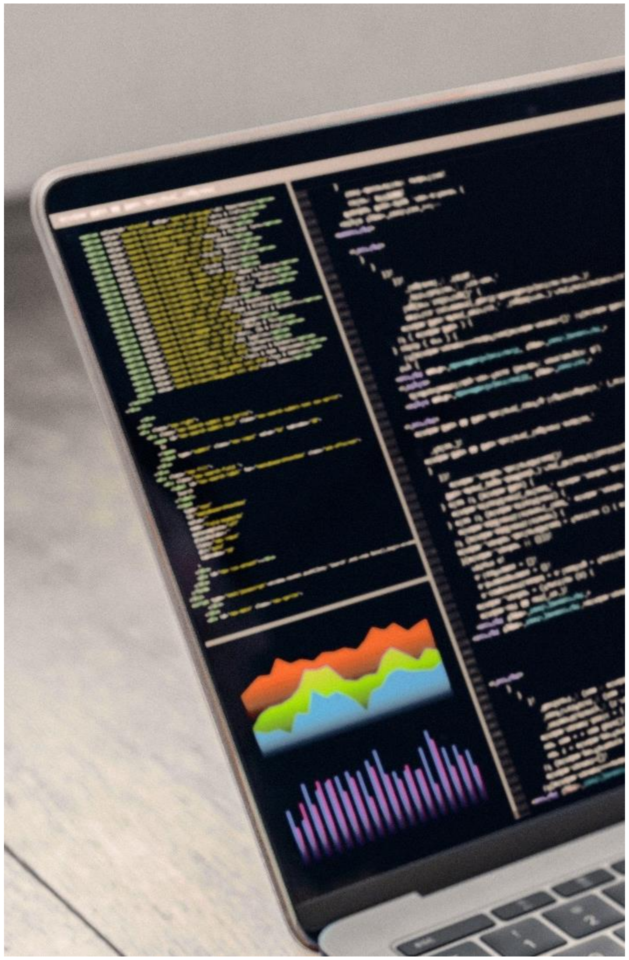


## Onboarding / Training

Please report any systems issues to your trainer who will then provide further instruction.

## Internet Connectivity Issues

Landmark support and Optum's Service Desk ***CANNOT*** take part in improving the quality, signal strength, download, or upload speed of your Internet. This must be handled between you and your Internet Service Provider (ISP).

## Equipment Considerations

| | |
|---|---|
| Replacements | If equipment becomes damaged, replacements may be ordered upon request. The item received may be a different brand or use different connections / controls based on equipment availability. |
| Accommodations | Please contact your supervisor in a private discussion if any equipment or office accommodations are necessary for you to fulfill your job requirements. |

## Quick System Troubleshooting

Before attempting any of these troubleshooting techniques, please notify your supervisor, or the Supervisor who is currently on shift, that you are having systems issues.

**Access** — Access requests such as Ubiquity permissions, can be requested through the Secure portal at: [https://secure.uhc.com](https://secure.uhc.com).

- The request will then be submitted to your manager for approval before IT works to resolve the issue.

**Applications** — Requests for applications, such as RoboForm, must be requested through the Optum App Store at: AppStore Home - E2T Intake Portal.

**SharePoint** — If you are getting "Access Denied" requests when trying to view a document or webpage on Landmark's SharePoint site, please send an email to landmark_spintegrationsupport@optum.com and request access.

- Please include one or two links to show as examples of what you are attempting to access.

***Equipment Delivery***

*Your equipment should be delivered to your home address **ONLY**. Please be home when the delivery occurs to ensure quick receipt of items as well as timely troubleshooting resolutions if misdelivered.*

*Tracking information may be provided by the Service Desk once shipped.*

***Address Accuracy***

*You are responsible for maintaining accurate employee contact information in Global Self Service (GSS).*

## Prolonged System Login Issues

In the event you are unable to login to your Optum-issued system in time for, or during, your shift:

1. Contact your supervisor as well as the Attendance Line:
    - If your supervisor is not available or online, contact the on-duty supervisor.
2. If login issues continue to prevent you from working for a second day, the Landmark First Leadership team will arrange for you to work in a nearby office.
    - Additional information will be provided by your supervisor based on the severity of the issue and estimated resolution time.

***Attendance Line Contact***

*Voice: (855) 317-0842*

*Text: (888) 863-0090*

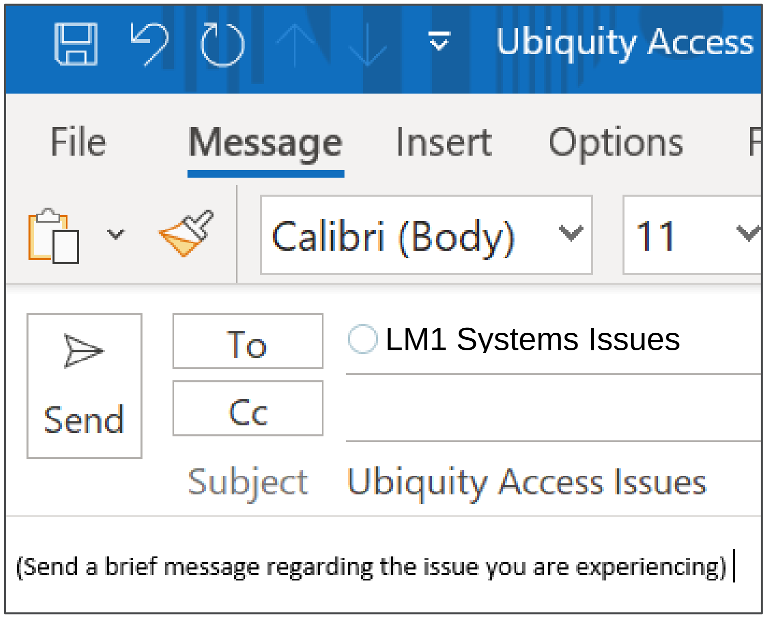
*Backup Email:*

lm1attendance@optum.com

*The backup email should be contacted ONLY if the other attendance lines are offline or out of service.*

## All Other Systems Issues

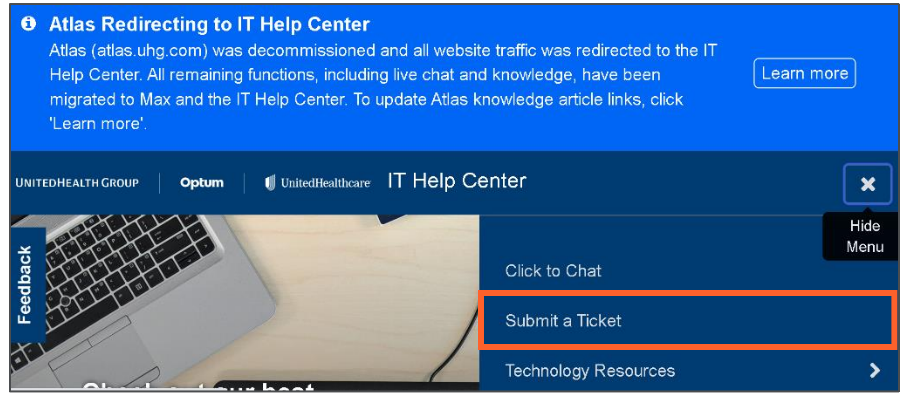
1. Email the Landmark First System Issues mailbox at: lm1_systemissues@optum.com.
    - A Supervisor will contact you in Teams:
    - For tracking purposes, a supervisor will tag you in in the “Systems Issues” channel under the “LM1 Full APCs, RNs, & PCCs” team.
2. Complete basic troubleshooting tasks to resolve the issue.
3. If your Supervisor is unable to resolve the issue, submit a Service Desk ticket:
    - For the fastest service, contact the IT Service Desk by Phone: (800) 561-0861
4. Provide your Employee ID number
5. Provide the last 4 digits of your SNN if prompted
6. IT will attempt to resolve the issue while you are on the phone



## Submit a Service Desk Ticket Online

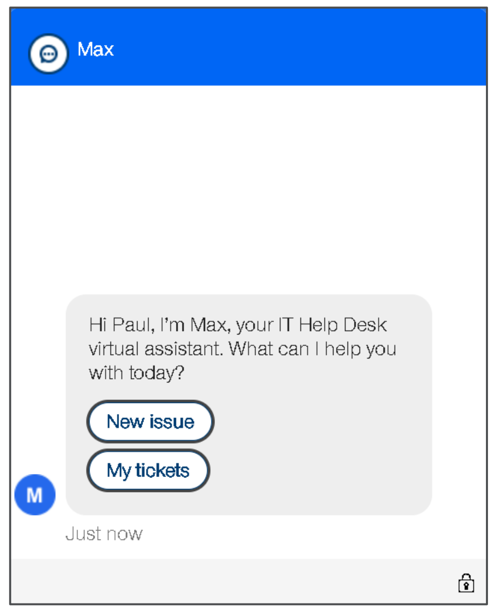
Alternatively, you may visit the Service Desk website to submit a ticket: https://helpdesk.uhg.com/hc

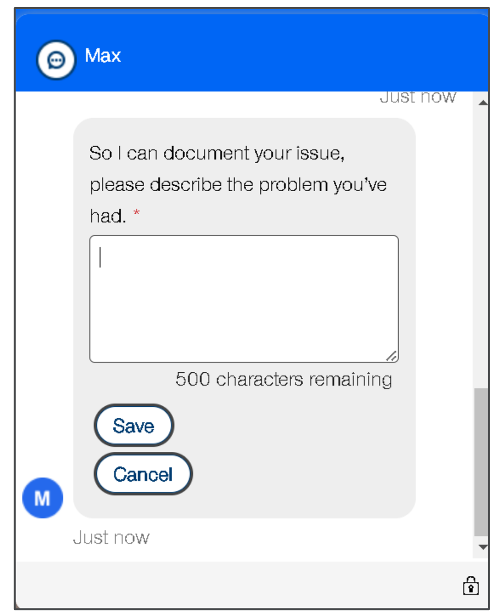
- The Help Desk may follow-up to schedule a remote session to fix the issue. If this is requested, notify your Supervisor before confirming your availability.
- After logging into the service portal using your Optum credentials, click the “Submit a Ticket” button to open a new chat.
- Use this chat to describe your issue and submit a ticket.




Forward the Incident ID to Your Supervisor After 1 hour:

- If the situation is not resolved after one hour, notify your supervisor.
- Your supervisor will follow-up with the Service Desk regarding your issue.



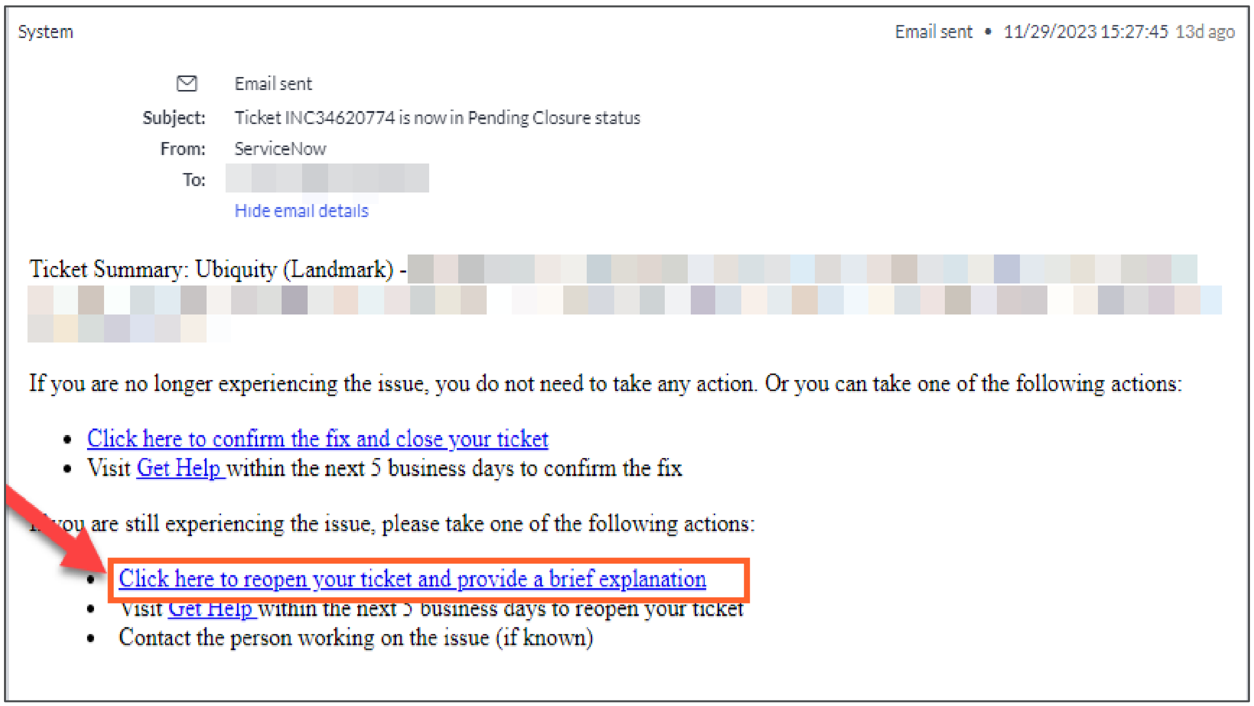



## Unresolved Tickets

You will receive an automatic email notification when a ticket is set to a Pending Closure status. This is the initial stage of closure. If no action is taken, your ticket will automatically move to a Closed status within 5 days.

If your issue was not resolved simply click on the link in the email labeled:
“Click here to reopen your ticket and provide a brief explanation”.

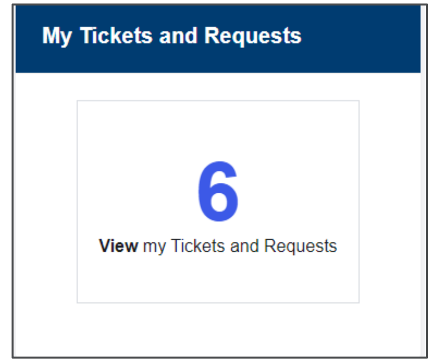
- Provide as much detail as possible along with any new screenshots or error messages.
- You can use the application “Snipping Tool” on your computer to take and save screenshots.



# Provider Hard Down Process (LM1 Clinicians)

Call the IT department or submit a ticket via the Service Desk portal:

- (888) 848-3375
- https://helpdesk.uhg.com




From the Service portal, navigate to the “View my Tickets and Requests” section.

1. Select the ticket that corresponds to your issue and click “Actions”.
2. Choose the “Escalate” option: