

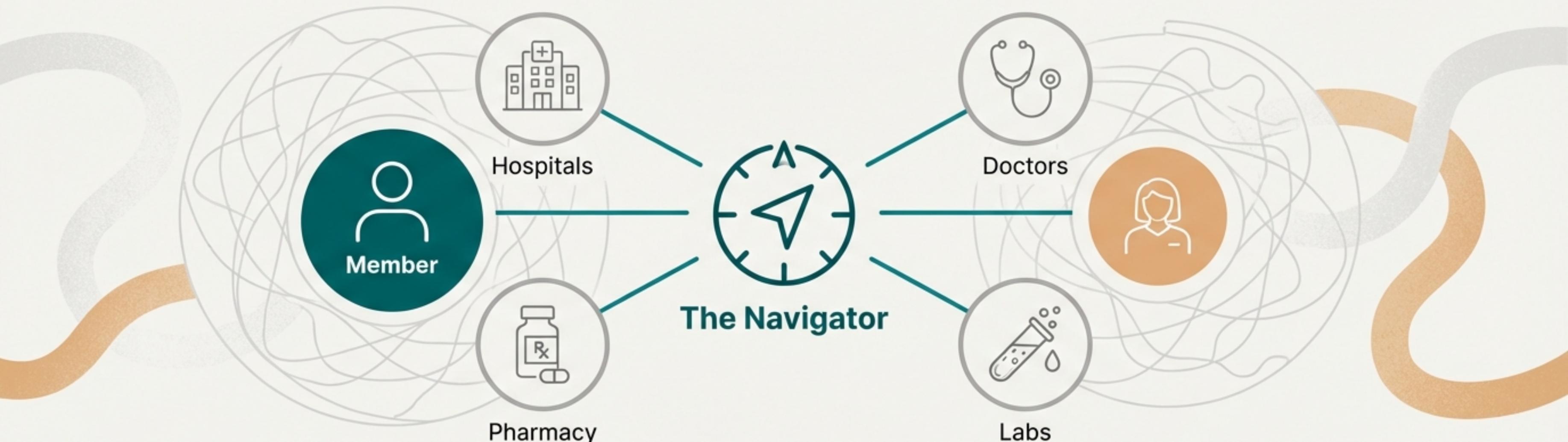


The AssistHealth Way: A Navigator's Guide to the Member Journey

Mastering the Standard Operating Procedures for
World-Class Healthcare Coordination.

You Are the Guide, Not the Destination

Your role is to be the single, trusted point of contact for our members. You simplify the complex world of healthcare by coordinating, advocating, and empowering them.



You Coordinate Services:
You arrange appointments, tests, and home care.

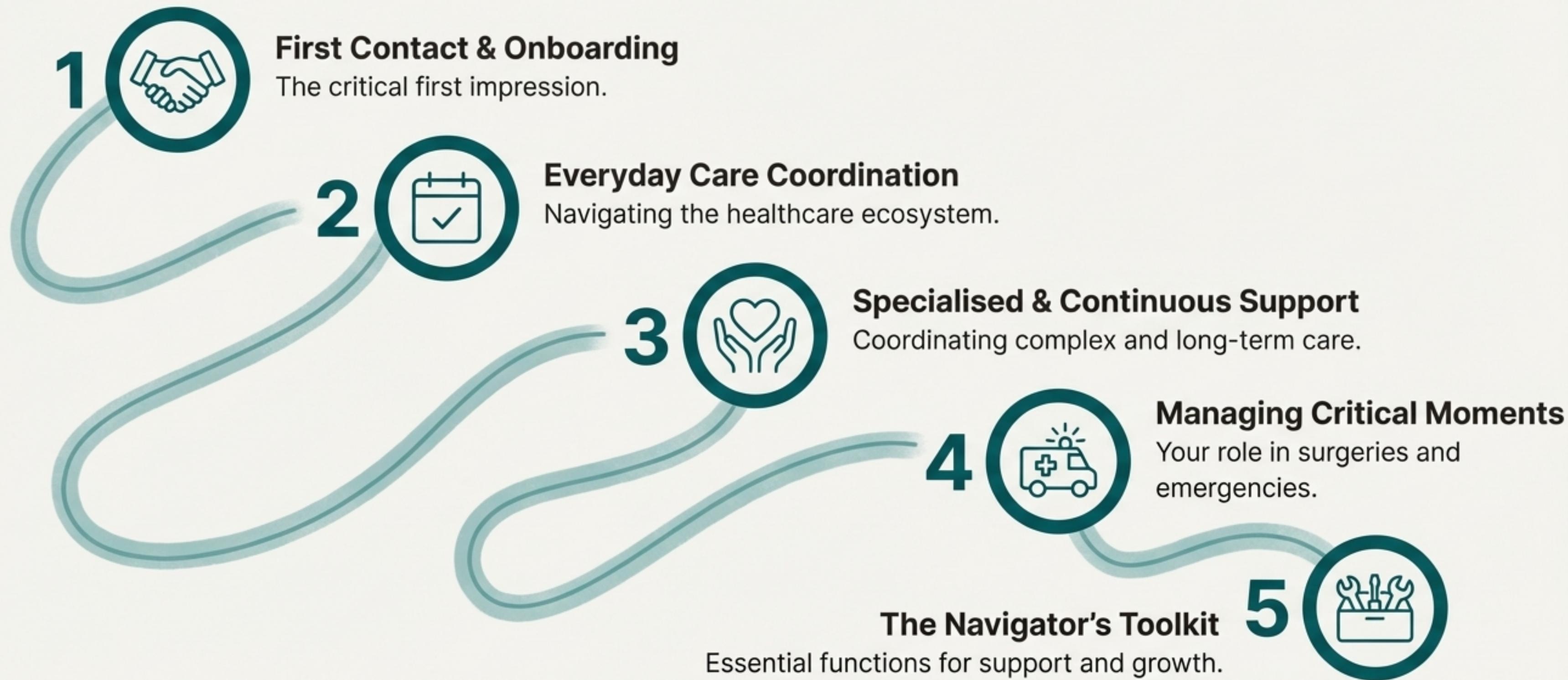


You Do Not Diagnose: You record and transfer information to doctors, you do not interpret results or give medical advice.



You Pave the Way: You ensure a smooth experience by communicating with hospitals, labs, and providers on the member's behalf.

Guiding Members from Welcome to Wellness



The First 4 Hours: Mastering the Onboarding Call

The first call sets the stage for the entire relationship. Your goals are to establish rapport, verify details, and clearly explain our value within 60-90 seconds.

1. Acknowledge (Within 2-4 hours)

Review details in the dashboard, save the member's name correctly, and send the initial WhatsApp welcome message.

2. Connect & Verify

Initiate the welcome call. Introduce yourself: "Good morning/afternoon, I'm [Name], your Healthcare Navigator from AssistHealth." Verify name, mobile, email, and address.

3. Explain & Educate

Pitch the Navigator role and plan-specific benefits (Basic, Premium, or Special Package).

4. Document

Collect and update the dashboard with: emergency contact, blood group, DOB, and insurance details.



Navigator's Focus: Request the member to save your number. This ensures they know who to contact for any medical requirement.

Building the Complete Picture: Medical History and First Steps

A thorough medical history is the foundation of excellent coordination. Your next step is to schedule the member's initial consultations, demonstrating immediate value.

Key Information to Collect



- **Medical Conditions:** Existing conditions (diabetes, hypertension), past surgeries, current medications.
- **Allergies:** Especially drug allergies.



- **Lifestyle & History:** Smoking, alcohol, family history (heart disease, stroke, etc.).
- **Care Network:** Regular treating doctor/hospital.



Critical Boundary: You do not interpret tests or prescribe medicines. Your role is to record and transfer information accurately to the clinical team.



Delivering First Value

Scheduling an AH Doctor

Gather 3 preferred time slots and mode (audio/video). Book in the dashboard and send confirmation.

Scheduling a Blood Test

Verify package entitlement. Coordinate with partner lab (home vs. centre). Send fasting/preparation instructions.

The Art of Connection: When a Member is Unreachable

A prompt connection is ideal, but not always possible. Follow this exact 3-step process to ensure a professional and consistent follow-up.

Attempt 1 (Same Day)

Call for 30-40 seconds. If no answer, immediately send WhatsApp message:

Dear [Member Name], I'm [Name], your Healthcare Navigator from AssistHealth. I tried reaching you for a quick welcome call... Please let me know a convenient time to speak...

Attempt 2 (4-6 Hours Later)

Call again. If no answer, send follow-up WhatsApp/SMS:

Hi [Member Name], this is [Navigator Name] from AssistHealth. Just following up on your membership welcome call...

Attempt 3 (Next Day)

Final call. If no answer, send closure message:

Dear [Member Name], We have been trying to connect... Whenever you are free, you can call or WhatsApp me on this number. Till then, your membership remains active...

****Escalation Note**: For Special Package, Corporate, or High-risk members, inform your Team Lead after 3 failed attempts.**

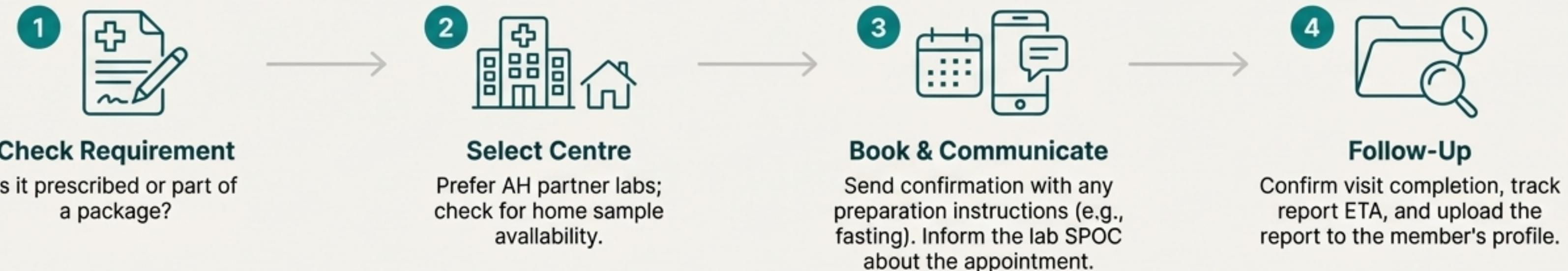
Navigating the Healthcare Ecosystem

Whether the member has a preferred doctor or needs a recommendation, your process is the same: thorough, efficient, and clear.

Booking a Specialist Appointment



Booking Diagnostics



Coordinating Continuous and Specialised Care

For ongoing needs, you are the central point for managing multiple providers and ensuring a consistent quality of care at home or in a day care setting.



Day Care Procedures (e.g., Chemotherapy, RCT)

- **Collect:** Procedure details, date, hospital, and insurance info.
- **Coordinate:** Get preparation requirements from the hospital.
- **Communicate:** Send confirmation and explain prep needs to the member.
- **Follow-Up:** Collect prescription, ask if medicine support is needed, and call the next day to check on their health.



Home & Long-Term Care (Nurse, Physio, Palliative)

- **Understand Need:** Type of service, duration, location, and budget.
- **Shortlist Providers:** Select from the verified panel.
- **Introduce & Finalise:** Arrange an intro call between the member and provider to confirm scope and timings.
- **Monitor:** For ongoing care, perform regular checks as per SOP.

A Masterclass in Major Events: Surgery Coordination

Surgery is a high-stress event for members. Your role is to bring order, clarity, and reassurance from start to finish.

Pre-Admission



Checklist: Ensure pre-op tests are done and insurance pre-approval is in place.

Share with Member: Reporting time, fasting rules, and a 'What to Carry' list (Reports, ID, Insurance docs).

Day of Admission



Reminders: Remind the member to arrive early.

Coordination: Arrange a hospital companion if requested and share the hospital's visitor policy.

Post-Discharge



Deliver Information: Secure and explain the discharge summary, medication list, diet instructions, and follow-up date.

PROACTIVE FOLLOW-UP

Same-day message

“Hope you reached home safely. Please follow the doctor's instructions...”

48-hour check-in call

“How are you feeling today? Any concerns you'd like me to coordinate?”

When Seconds Count: Your Emergency Protocol

In an emergency, you are a source of calm and decisive action. Follow this protocol exactly. Never deviate. This applies to all emergencies, including school emergencies.



1.

1. Identify & Reassemble

"This is [Name], Healthcare Navigator from AssistHealth. I'm here to help."



2.

2. Collect Critical Info (in 60 seconds)

Exact Location & Landmark,
Symptoms & Onset Time,
Consciousness/Breathing/Bleeding.



3.

3. Decide Action

If life-threatening, instruct them to call 108. If they cannot, you call an ambulance for them. Identify the nearest suitable hospital.



4.

4. Coordinate & Stay On

Relay critical info to the hospital. Stay on the line until the ambulance is confirmed or the family confirms arrival.



**YOU PROVIDE
APPROVED FIRST-AID
GUIDANCE ONLY FROM
AUTHORISED SCRIPTS.
YOU DO NOT GIVE
MEDICAL ADVICE.**

Essential Resources for Seamless Support

Beyond direct coordination, you manage key relationships and resources that ensure a holistic member experience.



Communicating with Relatives

First, verify identity and relationship. Clarify your purpose (e.g., routine update, emergency).

Set boundaries: "Navigator coordinates services, but does not diagnose."

Respect time zone differences for NRI families.



Pharmacy & Equipment

Obtain the prescription from the member. Contact providers to check for availability, price, and delivery options.

Relay all information to the member and get confirmation before ordering.



Insurance Support

Collect all insurance details during onboarding.

If a member has expired or no insurance, suggest and offer to conference in the AssistHealth insurance provider.

Growing Our Community Through Excellent Service

Every positive interaction is an opportunity to showcase our value and grow the AssistHealth family.



Handling Marketing Leads

- Call promptly.
- Use the 30-45 second value pitch (Personal Navigator, year-round support).
- Assess needs: “Are you seeking help for yourself or family?”
- Guide them to the right plan and assist with registration.



Encouraging Referrals

- Proactively explain the referral programme to satisfied members.
- Clarify that the bonus is added to their wallet and can be redeemed for future services.



Navigator's Focus

No false promises. Adhere strictly to official plans and discount policies.

The Principles of an AssistHealth Navigator



Member-First

Every action is guided by the member's needs, comfort, and safety.



Proactive Communication

Anticipate needs. Provide updates before you are asked for them.



Calm Under Pressure

You are the steady hand and the organising force in complex and emergency situations.



Meticulous Documentation

A clean, accurate record in the dashboard is the foundation of seamless, continuous care.



Know Your Boundaries

You are an expert coordinator and advocate, not a clinician.

Your Journey Starts Now



This guide is your foundation. The detailed SOP book is your reference. Your empathy, intelligence, and dedication are what bring our mission to life.

Welcome to the team.

Team Lead:
[Name/Email]

Operations Manager:
[Name/Email]

IT Support:
[Email/Hotline]