



Training Manual

Last Updated: October 11, 2013

Company Overview

Convenient Care Plus is a medical discount plan that addresses the issue of growing healthcare costs by providing affordable healthcare to employers, families, and individuals through an innovative model of providing care. Convenient Care Plus is not insurance, but a healthcare membership. We offer a 3 part membership plan:

- 1) on-site network provider clinics.
- 2) Telehealth option to speak with healthcare providers via telephone.
- 3) An online wellness tool.

With one monthly membership fee, individuals and their families have access to unlimited medical treatment within our network of providers, unlimited opportunities to speak with a doctor, and the option of an online wellness tool where members can get step by step instructions and guidelines to help them attain specific wellness goals.

Our membership covers minor illnesses and injuries that can be treated at most primary care facilities and urgent care facilities, with no out of pockets costs for our members.

Our Mission

To do good. We help people develop and use their talents and resources to make positive differences in the lives and health of others.

Our Vision

To be the preeminent low cost provider of non-emergent healthcare in America.

Contact Us

The Convenient Care Plus corporate office is located in Omaha, Nebraska, at the cross streets of 175th and Center.

17445 Arbor Street, Ste 300
Omaha, NE 68130

Corporate: 855-900-8701
Member Services: 877-900-8701

Accessing the benefit

Convenient Care Plus members are required to call the member services line to authorize and schedule their visit or call with a healthcare provider. The member service line is 877-900-8701. All new members receive a welcome letter with their membership card and pertinent information to access their benefit. Appendix A contains a copy of the welcome letter.

Customer Service

Convenient Care Plus strives to offer unparalleled customer service to all customers and members. We are a new and growing company in Omaha, Nebraska, entering the marketplace as an innovative way to obtain healthcare, while also striving to increase our brand awareness. We consistently need to meet the needs of all our customers to ensure continued success, increased return to our shareholders, higher job satisfaction, improved company morale, better teamwork, and market expansion. ICG agents are merely an extension of our company and are expected to present a consistent professional and confident impression to callers.

Who are our customers?

Convenient Care Plus has internal and external customers that are essential to our success. Our customers are our members, our healthcare providers, and our agents. Without these 3 important customers, there is no Convenient Care Plus.

Telephone Etiquette

Phone calls should be answered in a positive tone and within three rings to start the conversation off on the right foot.

Important Etiquette Rules

- Use formal greetings.
- Speak clearly. Take the time to speak clearly and in a positive, professional tone. Doing so will put the caller at ease.
- Listen & learn. Always allow our members to finish his/her thoughts without interruption and ask questions that clarify information. Be sure to confirm understanding with the caller before moving forward.
- No food or beverages. Members Representatives must refrain from consuming food or drink while taking a call.

Some things which may upset a customer are simply unavoidable. Please follow the steps below when troubleshooting calls.

Troubleshooting

- Putting a Customer on Hold. Ask the customer if you can put them on hold; wait for them to say or no and then explain it will only be for a short period of time. Thank the customer for holding. ICG agents can contact the on-call representative for Convenient Care Plus in an effort to resolve the issue quickly.

- **Transferring a Call.** Ask the customer if they mind being transferred; wait for them to say yes or no and explain why they are being transferred and to whom. Calls that agents will be transferring will consist of transferring to the Convenient Care Plus corporate office, calls to specific clinic locations to set an appointment, and transfers to Healthiestyou.

Inbound Calls

The member services line is essentially for current members only that are seeking to use their benefit. However, ICG agents may receive calls from prospective members, insurance agents, healthcare providers, and other vendors. These calls can be transferred to our corporate toll free line, 855-900-8701. Agents may also give out this corporate line and advise the caller that the number they called is the member services line.

If a current member calls the member services line for reasons other than scheduling an appointment (ie. questions regarding their membership, healthiestyou login information, billing, ect.), transfer them directly to 855-900-8701. If it is outside of normal business hours (8am-5pm, Monday –Friday), advise that they will be transferred to the corporate office and have the ability to leave a message for a prompt return phone call during regular business hours.

Training

It is important for agents to know and understand the Convenient Care Plus product in its entirety. This includes the telehealth and wellness components offered through Healthiestyou. Agents will be required to understand how members register their account for the wellness tool and the telehealth tool. They will also be required to know and understand the various types of providers in our network and the scope of service for each location.

Phone Script

When calls are received into the member services line, it is important to ask the appropriate questions to disseminate the calls appropriately. Members have the option to speak with a healthcare provider via telephone or see a healthcare provider at one of our clinics. It is our goal to assist the member in the best way possible. Appendix B contains a detailed call script.

The first time a member contacts our member service line, they will need extra guidance on locating a provider and understanding what they need for their appointment. In these cases, agents may need to deviate from script. This is why it is important to understand the Convenient Care Plus model of healthcare. Once members are scheduled in the Convenient Care Plus system, direct them to present themselves as a Convenient Care Plus member and present their membership card and photo ID. If they do not have their membership card, a photo ID alone will suffice. Convenient Care Plus is adding new members daily, so ICG agents can anticipate many first time callers.

A legal guardian is required to bring their dependent in and sign the consent to treat. A friend, neighbor, grandparent, ect does not suffice as a legal guardian.

Healthcare Providers

When designating which provider a member should see, representatives need to be cognizant of locations, hours, appointment restrictions, and scope of service. It is important for ICG agents to familiarize themselves with our clinics well. Convenient Care Plus has drafted several quick reference guides for all agents. See appendix C for a full detailed list of providers and contact information. Appendix D details the different types of clinics. There are 3 types of clinics in the Convenient Care Plus network; express care, extended care, and full care. Keep an accessible copy of this at your desk at all times as it is important to choose the best clinic for the member. If agents are uncertain of which facility type to choose, select a full care clinic. If agents are uncertain if their visit reason is covered, contact a Convenient Care Plus on call representative. Agents are always welcome to send a member to a full care facility and advise the member that they are able to see a provider. However, if the provider is unable to care for the member, they may refer them elsewhere. The member will not be responsible for that office visit if they are referred elsewhere.

Our network of healthcare providers contains many levels of healthcare professionals. It is important to refrain from using the word doctor, as our on-site network of clinics has medical doctors (MD), physician assistants (PAC), and nurse practitioners (APRN) all providing care. However, it is pertinent to know that our telehealth partner, Healthiestyou, has all licensed medical doctors that can diagnose and prescribe over the phone.

Privacy

Medical information we gather from our members is personal and confidential. We are committed to protecting medical information. Representatives are not to give out any personal information to anyone except the member without prior written consent. This includes immediate family members.

Members can complete the Privacy Release form to allow us to release medical information to specific individuals. They can do this by contacting our corporate office at 855-900-8701 or 402-980-4655 to obtain the privacy release form.

When members visit one of our provider locations, they are required to sign a consent to treat form which also gives them the option to notify Convenient Care Plus who their primary care physician is. If this portion is filled out, Convenient Care Plus will automatically send their medical progress notes to their primary care physician. This allows Convenient Care Plus to ensure that continuity of care is maintained.

Healthiestyou

Convenient Care Plus partners with Healthiestyou to offer the telehealth and online wellness component. From this portal, members can register their telehealth account, access the wellness login page, and search for prescription discounts. Healthiestyou is available to our members 24/7, 365 days of the year.

Healthiestyou portal: <http://member.healthiestyou.com>

To register their online wellness program, members will need to visit the site below and enter their access code.

Wellness Registration: <http://program.healthiestyou.com/register> access code: PROGRAM000068-PJ

While members may have the ability to call Healthiestyou directly to access the telehealth option, Convenient Care Plus strongly encourages our members to call us directly to then route them to Healthiestyou. It allows us to record utilization of the benefit.

Through Healthiestyou, members also have a discount prescription drug program. To use this benefit, members visit the healthiestyou portal, <http://members.healthiestyou.com> and click on discount prescriptions. This will give members the opportunity to see where a specific prescription is the most affordable and allow for coupons to be printed if applicable.

Updates

Convenient Care Plus is new and growing. Therefore, ICG will be notified immediately of any updates to our system, scope of service, or network of providers. While the member service center will be available 24 hours a day, our healthcare provider hours may change due to inclement weather or holidays. ICG will be notified prior to holidays with updated clinic hours.

Closing

If you have any questions or concerns regarding your position or the training you receive, please notify your supervisor. Convenient Care Plus wants to ensure that our agents are receiving the training and resources necessary to complete their job to highest standard.

Convenient Care Plus is always open to new ideas to better our operations. If you have suggestions to increase efficiency, please notify Convenient Care Plus and will discuss suggestions or concerns you may have. ICG's primary contact for Convenient Care Plus is Lynn Owen. 402-932-4642