

VACI Operations Policy & Procedures

Current Effective Date: **October 15th 2020**

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1. Summary

Background

The purpose of this policy and procedure is to provide employees and independent contractors of VA Claims Insider (“VACI”) with general information regarding the policies and procedures of the Operations department and left and right hand limits of how operational components are handled.

Overview

This policy and procedure will highlight expectations within the operation department and outline procedures for all departments that interact with the Operations department (Veteran Master Coaches and their teams, finance, and marketing).

2. Scope

Business Functions	Operations, Finance, Marketing, Veteran Master Coaches, Veteran Coaches
Functions(s)	The primary purpose of this policy and procedure guide is to establish documented guidelines and activities of how the Operations team will handle day to day and one off requests for our operating systems, telemedica interactions, call center, and payment refund/issues raised.

3. Changes from previous versions

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4. Roles & Responsibilities

The Operations team supports the daily operation needs for CEO, CFO, Veteran Master Coaches, Veteran Coaches, Finance, and Marketing. This document includes procedures for the following roles:

- **Operations Director:** Oversees and manages the operations of the department to ensure we are serving our cross functional partners in a timely, efficient, and effective manner.
- **Operations Manager:** Oversees the day to day tasks of the Operations Department
- **Technical Project Manager:** Oversees and project manages the tech built initiative project.
- **Operations Assistant(s):**
 - Oversees the daily operations and escalated issues to ensure our customers are receiving the best experience with respect to their medical care.
 - Oversee Escalated Call Center issues to ensure our customers are receiving the best information in a timely fashion.
 - Handle client interaction with financial disputes and negative incoming reviews
- **IT Manager:** Oversees the efficiency and effectiveness of the organization systems and user access; completes outstanding issues.
- **Veteran Engagement Manager:** Oversees the efficiency and effectiveness of the call center, web chat, and Facebook Mastermind Group.
- **Engagement Teams:** The engagement team includes Veteran Master Coaches, Veteran Coaches, Engagement Operations Managers, Engagement Operations Assistant, and Engagement Virtual Assistants (VAs)

5. Telemedica Core Procedures

Telemedica, LLC is an organization made up of independent medical providers who serve VACI customers at discounted contracted pricing; all providers are independent in their review and evaluation. Telemedica providers include Psychologists and Medical Providers.

Providers do NOT work for VA Claims Insider. They are contracted with Telemedica, LLC.

All contact for Telemedica should be raised via a ticket and/or by reaching out to customerservice@telemedicallc.com

5.0 Telemedica Services: Telemedica provides veterans access to a highly qualified team of providers through a simple, easy and convenient Telehealth platform.

- **Psychology Team-** Provides mental health evaluations/Independent Medical Opinions (IMOS)- Appointment only
- **Telemedicine Team-** Provides medical diagnoses/IMOS- Appointment only
- **Med Team (Nexus Letters)-** Provides nexus letters/IMOS- No appointment- medical records review only via email correspondence

5.1 Telemedica Operations: will handle day to day operations/requests submitted by the VMCs Operations Managers as the designated VACI Liaison to ensure requests are completed in a timely manner.

- Telemedica Operations Email: CustomerService@telemedicallc.com
- Telemedica IMO Requests/Follow-Ups:
 - Please submit a ticket via: <https://help.telemedicallc.com>
 - For any ticket submitted, you should expect a status update within 1 business day. An updated status (in progress, waiting on reply, etc) will be added to the ticket status along with any crucial notes and appropriate follow up.

5.2 Independent Medical Opinion (IMO) Quality Assurance Requests:

An Independent Medical Opinion (IMO) is supporting documentation that the Telemedica, LLC Providers fill out post their appointment with respective Veteran. The IMO has replaced the Disability Benefits Questionnaire (DBQ).

- Requests for review of an IMO due to clinical aspects of an IMO should be requested through this link: [Quality Assurance Request](#)
 - VMCs should allow up to 7 business days to have a review response from Telemedica.
 - Do not submit another request within the 7 day timeframe. Follow up requests after the 7 day period can be directed to quality@telemedicallc.com
 - This should be sent for an IMO that needs to be reviewed by Telemedica Quality Assurance Panel . (examples: checkboxes don't match the write-up, IMO revision requests, errors, clarifications, etc)
 - Quality Assurance Requests will be reviewed by the Telemedica QA panel before a final decision is made. Review and decision of IMO will be at the sole discretion of the Telemedica QA Lead Provider. Please note that it is *NOT appropriate to ask a provider to change their medical opinion.*

5.3 Medical Records For Consideration: No additional medical records OR NEW information uploaded/given post evaluation will be accepted by the providers. If the client has new information that they would like included after the original evaluation, the client will be required

to pay for a new full priced evaluation. (Exempt: special circumstances- prior approval required and a \$100 fee may be incurred)

5.4 Appointment Confirmations: Telemedica will send out confirmation emails for all appointments 48 hours in advance.

- **Timezone:** Please note that ALL appointment confirmations are listed in **CST**. *Any appointments that are missed due to timezone errors by clients will be rescheduled at a cost of \$50.*

5.5 Appointment Reschedules: Clients must handle their own rescheduled appointments. If a veteran (client) must reschedule their appointment they should email the customer support inbox: CustomerService@telemedicallc.com or reschedule on their own via the appointment confirmation email they received upon booking.

- **Rescheduling > 24 hours prior to appointment:** Customer reschedule through their confirmation Simply Book Me link or may reach out to Telemedica directly for assistance through: CustomerService@telemedicallc.com
- **Rescheduling/Canceling/No Shows < 24 hours of appointment:** Customer should reach out to Telemedica Customer Service directly for assistance.
 - Fees: Telemedica will invoice the client directly for short notice changes.
 - First time fee within the 24hr window: \$50
 - Second time fee within the 24hr window: \$100
 - If a second appointment is missed the client will not be able to reschedule a 3rd appointment without prior approval
- **Provider Cancellation/No Shows:** If for any reason the Provider cancels within 48 hours of appointment , it will be the responsibility of Telemedica to help reschedule the client to be seen within 72 hours of original scheduled appointment. In this case, the client will NOT be charged the \$50 reschedule fee.
- **No Medical Records:** A Veteran will be rescheduled if they do not have their intake form or medical records in their folder within 72 hours of appointment (exempt: special circumstances- prior approval required)

5.6 Payment: Payment is made through PayPal, and forms of payment are Visa, Mastercard, Discover, American Express, PayPal Mastercard, Venmo & PayPal credit.

- **Payment Issues:** For customers having issues with payments or a refund request, they should email: CustomerService@telemedicallc.com.

- **Insurance:** Telemedica does not accept any forms of insurance. There are some FSA & HSA accounts that allow the use of the debit card attached to it to be used within PayPal. If the card is declined the plan does not allow that type purchase.

5.7 Issues/Complaints: All internal complaints related to Telemedica & the providers should be directed to the Telemedica ticketing system. VMCs, VCs or Ops Managers should never contact any provider directly.

- **Med Team (Nexus Letters):**
 - Requests for Med Team connections should be sent to CustomerService@telemedicallc.com
 - Clients have the ability to contact their Med Team Provider directly via email once contact has been initiated by the provider.

6. PipeDrive Core Procedures

The IT Manager is responsible for managing all aspects of PipeDrive and it's connected platforms. The team will monitor and manage all updates and enhancements to PipeDrive, as well as manage the team responsible for building, changing, and maintaining in PipeDrive.

6.1 Urgent/Critical Issues: If an issue impacts more than 10% of users, it is considered an Urgent/Critical issue.

- Users may report an urgent issue to the Operations Systems Lead by whatever means necessary (Slack, Phone, Email, etc.).
- The Operations System Lead will gather the appropriate team members to investigate and resolve the issue, and is responsible to inform affected users and leaders in a timely manner. For expectations, updates by Operations Systems Lead will be done on a daily basis (every 24 hours).

6.2 Non Urgent Support: Users can submit a PD Ticket through Zendesk [Link](#)

- **Response Timelines:** Monday thru Friday, tickets that are submitted prior to 5pm EST will be resolved within 24 hours.
 - Tickets submitted after 5pm EST on Friday will be resolved by Monday 12pm EST.
 - If a ticket submitted requires additional work or time, the submitter will be notified and notes will be left on the ticket. For IT to continue further, it will be the responsibility of the submitter to turn around additional information in a timely manner (within 48 hours).

- If IT requests further information from the submitter and does not receive the information within 48 hours, the ticket will be closed and the submitter will need to re-submit.

6.3 PipeDrive User Guide: View the user guide [HERE](#)

7. IT Maintenance Core Procedures

The IT Manager is responsible for managing all aspects of IT Maintenance that impacts VACI. The IT Manager's responsibilities include monitoring systems for optimal performance and addressing support tickets. (this excludes initiatives launched by Marketing, though operations works closely with Marketing initiatives).

7.1 IT tickets: The IT Team is responsible for resolving all IT tickets.

- **IT Submission:** Tickets can be [submitted here](#).
 - To setup your account for the first time, follow these [instructions](#)
 - IT Submissions tickets may include access requests, url breaks, etc.,
 - This submission form will serve as the single point of entry for all VACI employees and independent contracts for non-urgent issues.
- **Response Timelines:** Depending on the severity of the issue, the timeline can change. Generally simple tickets will be completed by next business day (24 hours).
 - The IT Manager will escalate urgent issues to the Director of Operations and the affected parties as is appropriate.
 - The IT Team will communicate to the ticket submitter if an issue is going to require more than 24 hours to complete.

7.2 Monitoring Company Systems: The IT Manager will regularly monitor systems for optimal performance and any potential issues on a daily, weekly, and monthly basis.

- The IT Manager monitors and sends detailed daily reports to the Operations Manager (by 2pm EST) on the status of Company systems and any outstanding issues. **Any outages will be reported to the Director of Operations immediately upon discovery.**
- The IT Manager, Operations Manager, and Operations Director will meet on a weekly basis to review the weeks IT performance (tickets, outages, etc..)

7.3 Onboarding / Offboarding Procedures: The IT Manager will receive onboarding requests weekly by Wed weekly by way the HR Team.

- Within that request, detailed information of the new hire to include the system(s) and access level requirement will be required to sufficiently onboard the user.
- The IT Manager will send to HR on Fridays (prior to 12pm EST) a list of new hires starting the following Monday along with a status of their system access before heading into the weekend.
 - HR will send a finalized recap (to include status of tech systems to the hiring Manager by Friday afternoon. This will provide transparency to the Manager of what to expect come Monday and what outstanding information may be needed from new hires to get them all setup from an IT perspective.

8. Call Center Core Procedures

Veteran Engagement Manager is responsible for overseeing the functions of the Call Center. The Call Center is responsible for handling all customer service requests coming in through phone, web chat, and the @info email address. The phone reps report to the Veteran Engagement Manager and serve incoming clients calls / chats to the best of their ability to provide the best informative customer service. Some service examples include new prospects who are inquiring, existing clients attempting to make contact with their Veteran Coach, payment inquiries, Mastery Member guidance, etc.,

8.1 Escalated Support: The service agents (phone, email, chat) will escalate any items/topics to their VEM in any situation in which they are not able to provide information directly to the customer.

- The Call Center Team will close out escalated items within a 24 hour timeframe with the respective client
- For any escalations that the Veteran Engagement Manager cannot answer, he/she will escalate to the Operations Manager. (Escalations will require a 3 day turn-around).
- Each member of the Call Center Team will utilize the VACI Client Engagement Tracker to track issues and take detailed notes for each engagement with a client, allowing the VEM and Operations Manager to have visibility into trends of issues, details of issues, etc.

8.2 Issues and Complaints: Call Center Agents will first notify customer(s) that they will be contacted within the next 3 business days for a follow-up on their issue. Call center agents will then immediately escalate to the VEM.

- The Veteran Engagement Manager will (if needed) notify the VMC of the incoming issue/complaint from client for VACI respective issue and request necessary information.
 - If the issue involved customer payment, the VEM will route to the VAMs (finance).
 - For a Telemedica payment issue, VEM will route to CustomerService@telemedicallc.com.
- VEM will pull Ops Assistants in as necessary for VC reassignment requests and Contract Cancellation requests so that Ops can research and resolve as needed.
 - Ops Assistant will communicate any contract cancellations on a weekly basis to the Call Center team so that the team can remove members from Mastermind Facebook Group.
- Operations Manager and VEM will review issues / complaints on a monthly basis.

8.3 Facebook Mastermind Group: Call Center Agents oversee control and access to VACI Facebook Mastermind Group, including approving pending posts and pending join requests.

- **Escalated issues:** If behavioral issues are identified within the FB Mastermind Group, the Call Center Agents will first notify user(s) of misuse and provide a warning. If a repeat occurs, call center agents are to remove member(s) and notify VEM, immediately.
 - VEM will track removals separately and input notes within the clients PD deal of those that were removed from the FB mastermind and 'WHY'
- **Suicide:** If a call center agents observes suicide ideations or threats through the FB Mastery Group, the call center agents will notify VEM, VC, VMC, and the Operations Director immediately as well as the suicide hotline:
 - Suicide Hotline #: 1-800-273-8255 Website: <https://suicidepreventionlifeline.org/>

8.4 Mastery Member: The VEM also is responsible for the Mastery Members and their onboarding process. The Mastery Member is an additional product that VACI offers in addition to the Elite program.

- The VEM manages all Veterans as they sign up; this includes onboarding and ongoing support
 - If a VMC/VC would like to redirect an Elite member to Mastery to better suit their needs, they should contact the VEM directly at rachelle@vaclaimsinsider.com .
 - Examples include: If the client has already filed their claim before becoming a member and just needing additional medical evidence.

- Refunds: Veterans are eligible to receive a full refund within 30 days of signing a Mastery Member contract
- Payment: Mastery Members have an option to pay in full or in 4 monthly installments. If the Veteran would like to request any Mastery Member payment inquiry, they can do so by emailing: support@vaclaimsinsider.com

9. Issues and Complaints Core Procedures

The Operations Manager is responsible for facilitating all complaints and resolutions, except those related to Telemedica, LLC.

All issues/complaints should be routed via the [VACI Support Site](#). This includes requests for reviews of invoicing, contract cancellations, service complaints, VC reassignment requests, etc. To ensure we have the appropriate information to begin our process, each ticket should include:

1. Veteran Name
2. Veteran Email
3. Veteran Deal ID #
4. Pipeline and stage that the Veteran is currently in
5. Details of the issue at hand
6. Latest communication between VC and Veteran Client

Please note: we will not cancel contracts in which the client has utilized resources and/or have submitted a claim and are waiting for the VA to reach a decision.

9.1 Veteran Complaints & Follow Up:

If a Veteran has a complaint either through their VC, VMC, and or through external channels the outlined process below should be followed:

- **Active Client**
 - **Veteran Complaint upon receiving Winvoice:** Upon receiving notification of a complaint via finance or directly from client, the Operations Assistant will engage the appropriate Veteran Master Coach of the issue and review the clients file at hand. If needed, the OA will request further information from VMC. The OA will relay the suggested COA and ensure alignment with VMC leadership.
 - Complaints may include: Winvoice, contract cancellations, etc.,
 - VMC will always follow up with client(s) via phone and email to document the decision moving forward.

Procedure Owner / Primary Contact	Owner	PoC
Owners Function	Operations Director	Hallie Johnston
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