

Policy S-225 Customer Service Repair Triage

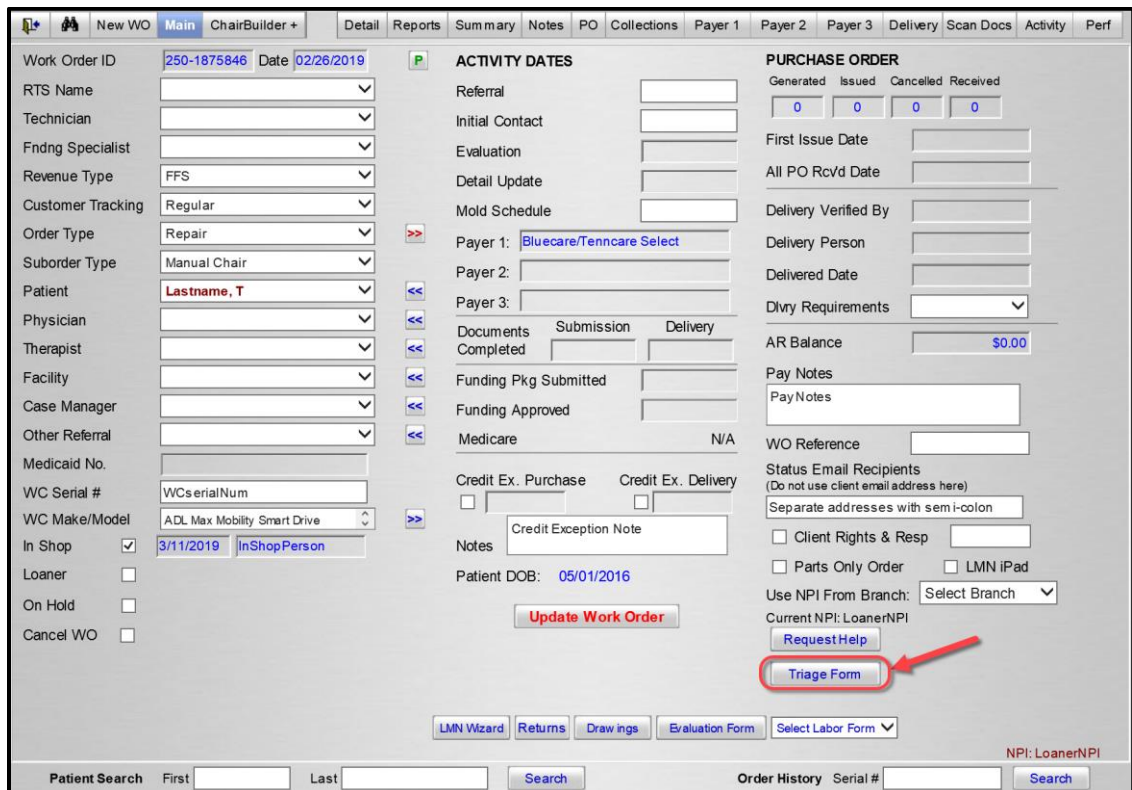
Introduction

Typically a client will call into the office to request repair service. During initial contact with the Customer Service Representative, it is critical to capture as much information about the nature of the repair need as possible. This information provides the Technician with a greater opportunity to resolve the repair as soon as possible. The Repair Triage Form provides a guide for the Customer Service Representative to capture pertinent information about the repair issue and store the collected information in the client's work order for the service Technician to reference.

Procedure

Customer Service

1. Client call regarding repair is received at the branch.
2. The CSR will open a new work order and conduct the following
 - a. Interview the client and complete the Repair Triage Form (attachment A). The Repair Triage Form is located on the main screen of the work order in Rehab Advisor.
 - b. Note: Clients may send pictures via text or email to NSM owned devices ONLY (phone, computer, etc.)



The screenshot displays the 'Main' screen of the Rehab Advisor software. The interface is divided into several sections:

- Left Panel:** Contains dropdown menus for 'RTS Name', 'Technician', 'Fndng Specialist', 'Revenue Type' (set to FFS), 'Customer Tracking' (set to Regular), 'Order Type' (set to Repair), 'Suborder Type' (set to Manual Chair), 'Patient' (set to Lastname, T), 'Physician', 'Therapist', 'Facility', 'Case Manager', 'Other Referral', 'Medicaid No.', 'WC Serial #' (set to WCserialNum), 'WC Make/Model' (set to ADL Max Mobility Smart Drive), 'In Shop' (checked, date 3/11/2019, InShopPerson), 'Loaner' (unchecked), 'On Hold' (unchecked), and 'Cancel WO' (unchecked).
- Top Navigation:** Includes tabs for 'New WO', 'Main', 'ChairBuilder +', 'Detail', 'Reports', 'Summary', 'Notes', 'PO', 'Collections', 'Payer 1', 'Payer 2', 'Payer 3', 'Delivery', 'Scan Docs', 'Activity', and 'Perf'.
- Activity Dates Section:** Includes fields for 'Referral', 'Initial Contact', 'Evaluation', 'Detail Update', and 'Mold Schedule'. Below these are 'Payer 1' (Bluecare/TennCare Select), 'Payer 2', and 'Payer 3'. There are also checkboxes for 'Documents Completed', 'Submission', and 'Delivery'.
- Purchase Order Section:** Includes a table for 'Generated', 'Issued', 'Cancelled', and 'Received' (all with value 0). It also has fields for 'First Issue Date', 'All PO Rcv'd Date', 'Delivery Verified By', 'Delivery Person', 'Delivered Date', 'Divry Requirements', 'AR Balance' (\$0.00), 'Pay Notes', 'WO Reference', and 'Status Email Recipients'.
- Bottom Section:** Contains a 'Notes' field, 'Patient DOB' (05/01/2016), an 'Update Work Order' button, and a 'Triage Form' button which is highlighted with a red circle and a red arrow. Other buttons include 'Request Help', 'LMN Wizard', 'Returns', 'Draw ings', 'Evaluation Form', and 'Select Labor Form'.

Technician (AM base time prior to evaluation)

1. Prior to departing on the daily route, the Technician will review all scheduled Evaluations and Deliveries including all associated documentation.
 - a. For any scheduled Evaluations, validate if a Remote Evaluation has been attempted by reviewing the Notes tab in Rehab Advisor.



- b. If not, conduct a Remote Evaluation (refer to Policy S-230).
- c. If a Remote Evaluation was attempted but not able to be completed, proceed as scheduled.
- d. The Technician will call the client with the first scheduled appointment to confirm arrival time.
- e. If appropriate, the Technician will ensure the parts or loaner parts/chair is loaded onto their vehicle prior to departure from the branch.
- f. The Technician will complete the Repair Evaluation per the normal process.