



Policy S-500: Service and Repair Model: In Branch Appointments to NSM Branch Service Center

**Updated: 8/2023**

**Introduction:**

**At NSM, our default service delivery model is Remote Service Support (RSS) and our In Branch Service Center model.** Service/Repairs outside the branch require management approval. Each branch location has a designated service area, and the branch location must use escalation criteria prior to deploying a technician into the field which includes appropriate triage and remote evaluation methods. Repair appointments scheduled in an NSM Service Center improve the client experience by returning items needing repair in a timely manner, avoiding multiple appointments due to incorrect parts, providing the client opportunities to collaborate for their needs and creating opportunities to educate clients on both existing equipment and ancillary products. This service model also maximizes efficiency and allows for side-by-side training for newer technicians.

The purpose of this policy and procedure is to empower the Remote Service Support (RSS) and the local Service Center teams to provide the most comprehensive and timely service possible. This policy will define the guidelines for how branch leaders will support Service and Repair. Leaders are expected to implement programmatic methods and procedures to ensure that the NSM Service model is being executed to standard and meets the client care needs in their markets.

**In-Branch Requirements**

- ✓ [Assigned training completed by all branch employees.](#)
- ✓ ATPs communicating in-branch service model at all evaluations and deliveries.
- ✓ [Branch readiness checklist completed.](#)
- ✓ RSS 2.0 process installed. \*
- ✓ Shared calendar implemented.
- ✓ [CSS scripting in-use.](#)
- ✓ Branch zoning completed.
- ✓ Understanding of Zone 99.
- ✓ [Transportation directory completed.](#)
- ✓ Technician in-branch, a minimum, twenty-four (24) hours per business week.
- ✓ Loaner equipment available.

**[View the In-Branch Playbook for detailed instructions on how to implement in a location.](#)**

*\*For pilot locations, RSS 1.0 is sufficient*

**Guiding Principles:**

<b>Guiding Principles</b>
Desire to remain the Provider of Choice for both clients and our NSM teammates
Pursue excellence in client and team member outcomes
Eliminate inefficiencies in our process to improve the client experience
Lead the CRT industry in shaping the client service model



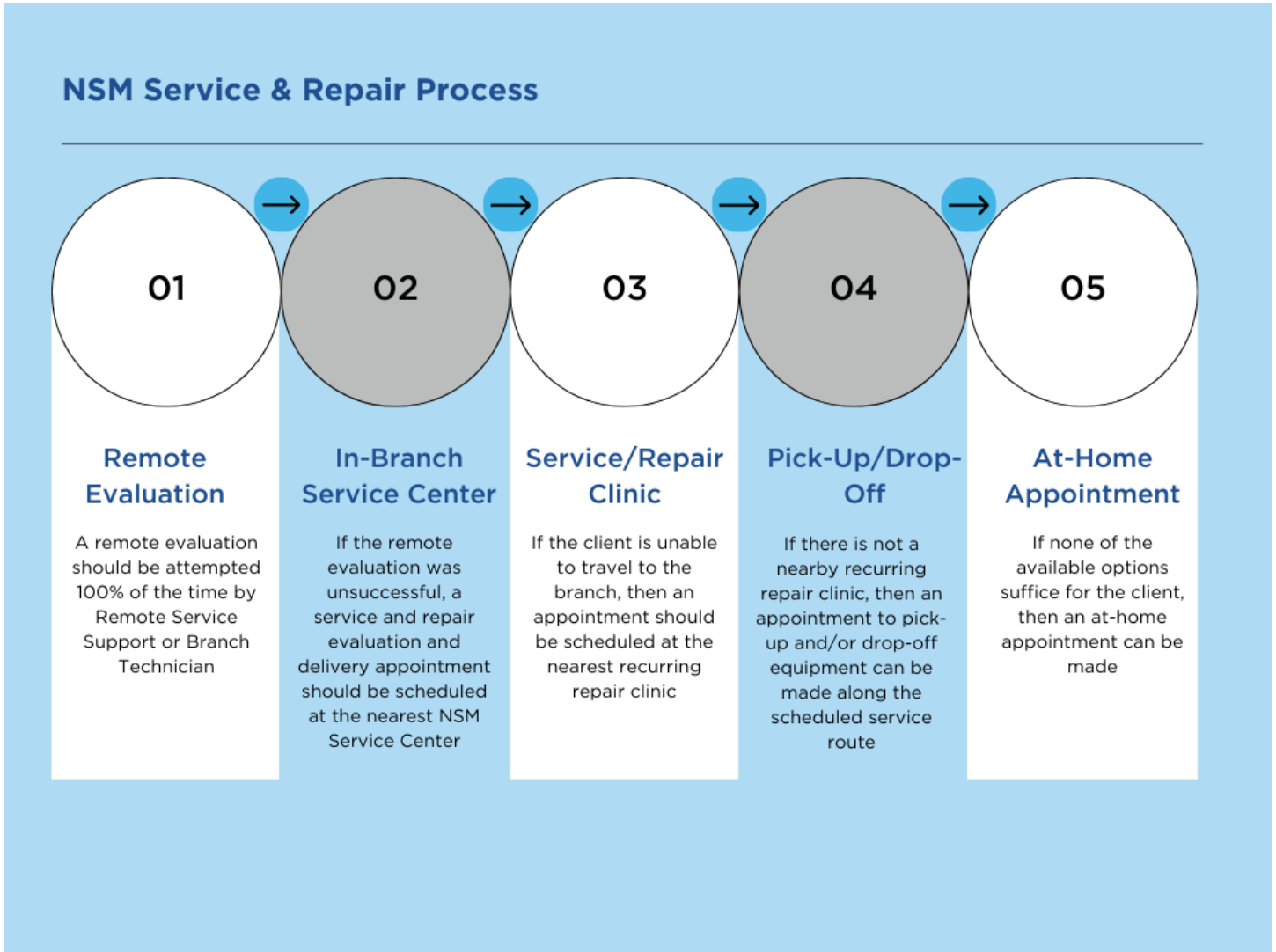
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**Why:**

Simply put, we believe that In-branch activity affords the client a high-quality experience where we have an opportunity to serve them faster. The table below provides some additional detail.

<b>NSM Branch Employee</b>	<b>NSM Client</b>	<b>NSM</b>
Ease of scheduling	Resolve issues faster	Reduce TCT
Safer for technicians	Increase quality/accuracy	Draw down backlog
Technicians can serve more clients per day	Stock replacement parts available; opportunity for loaner equipment	Opportunity to improve productivity
Side by side training with technicians	Ability to repair at evaluation	Reduce operational expense
Higher probability to problem-solve with peer group	Improved communications and interactions with NSM	Helps to manage labor and allocate services to support more consumers

**NSM Service and Repair Process**



**Best Practice Principles**

Service is defined as inspection, maintenance, component replacement or repair of mobility equipment.

<b>Best Practice Principles</b>	
Communication	<ul style="list-style-type: none"> <li>• Always utilize AIDET® when communicating with the client and their caregiver.</li> <li>• Inform the client that we have a lift available in the branch to assist in transferring, however they must provide their own caregiver for assistance.</li> <li>• Show the client where the restrooms are, offer them something to drink and do your best to make them comfortable while they wait.</li> </ul>



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Branch Accessibility / ADA Compliance	<ul style="list-style-type: none"> <li>• Ensure the branch is handicapped accessible with plenty of parking, an ADA compliant chair ramp and automatic door opener.</li> <li>• Ensure that the branch meets 5S standards.</li> </ul>
Documentation	Standardized procedures
Prevention and Replacement	<ul style="list-style-type: none"> <li>• Identify critical warning signs of component failure.</li> <li>• Use 19 Point Inspection Protocols</li> </ul>
Education	<ul style="list-style-type: none"> <li>• Provide the client a copy of the “Client’s Rights and Responsibilities” document as early in the order process as possible.</li> <li>• Review the 19-point checklist with the client once repairs have been completed.</li> <li>• Inform the client that they may receive a survey via USPS or email and encourage them to complete it. Inform the client their feedback is very important to NSM.</li> <li>• Educate and provide written instructions, along with sending electronically.</li> <li>• Educate clients at delivery the RUL (remaining useful life) expectancy with equipment components and experienced clients can be instructed to make minor repairs such as tire pressure, caster flutter, etc.) The frequency of these inspections and repairs and their reasoning should be clearly explained by TS or ATP.</li> </ul>



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**Importance of Repair Triage and Operational Definitions**

The intent of the below is to walk associates through the process of providing excellent service by completing repairs promptly, and by defining elevating repairs for immediate service for Group 3 Complex equipment. Reference the Common Calls Checklist for specific scripting in each scenario.

<b>Emergency Requests</b>	Life threatening situation: e.g., client is stuck in the middle of the road needs to hang up and call 911 emergency services to respond to life-threatening situation. <b>NSM Response:</b> Any time the client is in immediate danger; they should request 911 emergency response vs. NSM for assistance.
<b>Urgent Requests</b>	A consumer’s chair is completely inoperable, e.g., the consumer is stuck in recline or tilt, or imminent skin integrity and pressure management issue. <b>NSM Response:</b> conduct Remote Evaluation; repair triage questions; cannot resolve the issue AND the client does not have an appropriate back up w/c. Schedule consumer for earliest available In Branch, at clinic or at home appointment following escalation criteria.  <b>Operational Note:</b> An attempt to provide loaner equipment should be standard practice with all <b>urgent repair requests</b> . Loaner equipment must be discussed as part of the interaction with the consumer especially if a complex repair is expected to take longer than anticipated. The loaner equipment must be like that of their current system but is not in all cases expected to be an exact system. Several States offer reimbursement opportunities for loaner equipment, please consult the Payer Relations team <a href="#">for loaner equipment policy guidance</a> and <a href="#">agreement</a> .
<b>Routine Requests</b>	Any other repair requests that do not fit into the above scenarios follow the In-Branch Service Decision Tree.

If loaner equipment cannot be provided, the client should be notified their repair parts will be ordered with an expedited methodology.

**Escalation Criteria for Home Appointments (Met/Unmet)**

- Prior to scheduling a client appointment at the home; the below criteria must be met, and management approval received for a branch associate to schedule a home appointment.

<b>Criteria</b>
Triage and Remote Evaluation conducted
In-Branch Service Center scheduling attempts as evidenced by Mobility Advisor
Provided Accessible Transportation options
Availability at a repair clinic within a facility
Within Defined Service Area Zone Proximity*
Alternative delivery/install options (Drop Ship)
Back up or loaner equipment unavailability



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Outside Service Area: designated routine route that is already preestablished
Management Approval

**\*Recommended no greater than 60 min radius from the Service Center location for typical traffic patterns; we will only support a driving radius for technicians that encompasses 80% of our current consumer service/repair population based on the evaluation and delivery heat mapping.**



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**Parameters for Home Appointments**

The below parameters must be maintained relative to client home appointments. There are specific work order types for which we will not conduct a home appointment. This may include repair subcomponent parts or an order type in which insurance does not cover the operational cost. In all situations below, by policy, we will only provide clients service within our In Branch Service Centers.

\*\*The below list is meant to provide general guidance and is subject to change depending on reimbursement profiles with specific national and regional payers.

**Equipment NSM Will Not Service at Home**

**Equipment we did not provide**

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**Scooters: Group 1 and Group 2 non-complex equipment**

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**Clients who live outside of the branch service area**

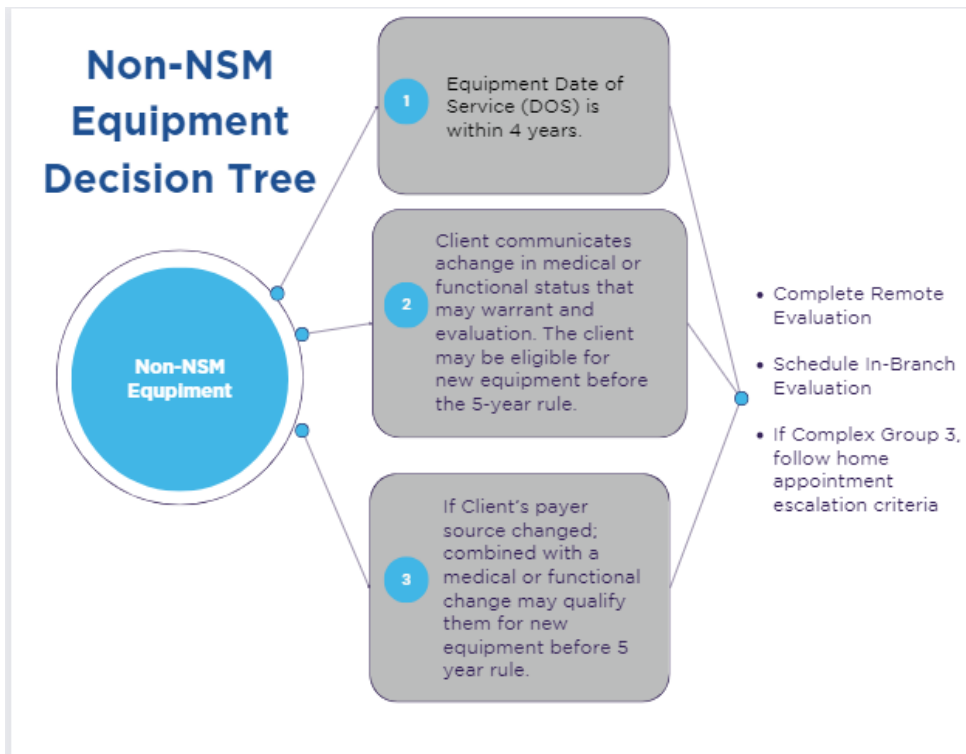
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**Warranty and Recall work orders from other providers**

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**ADL equipment work orders from other providers**

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**\*Considerations**

- If a new client is calling and discussing a repair but is also in need of a new piece of equipment, discuss taking on the referral with the local branch leader.
- If a referral source is requesting we take on a repair to a chair we did not provide, discuss with the ATP and local branch leader for an exception with follow up discussion with the referral source regarding the NSM share of the clinic.
- Place of Service: Immediately and moving forward, if the branch has a business case to take on the repair, non-NSM chair *evaluation and deliveries* for repairs must be scheduled in clinic or in branch vs the home after remote options have been attempted.
- As a reminder, organizations where NSM has acquired the business are NSM clients and this policy does not apply to repair requests.
- If an insurance is requiring NSM to take on a repair to a piece of equipment that we did not provide due to contractual obligations, please discuss with the local branch leader before moving forward.

**NSM Service Center Standards**

- Understand that most NSM clients have other reasons to leave the house e.g., social appointments, school activities and events, civic engagements, religious affiliations and activities, medical appointments, shopping and groceries, personal appointments, etc.
- At the point of initial engagement with the client, all branch team members including RTS/ATP must educate the consumer of our NSM Remote Service Support and In Branch Service Center Model as our primary service.





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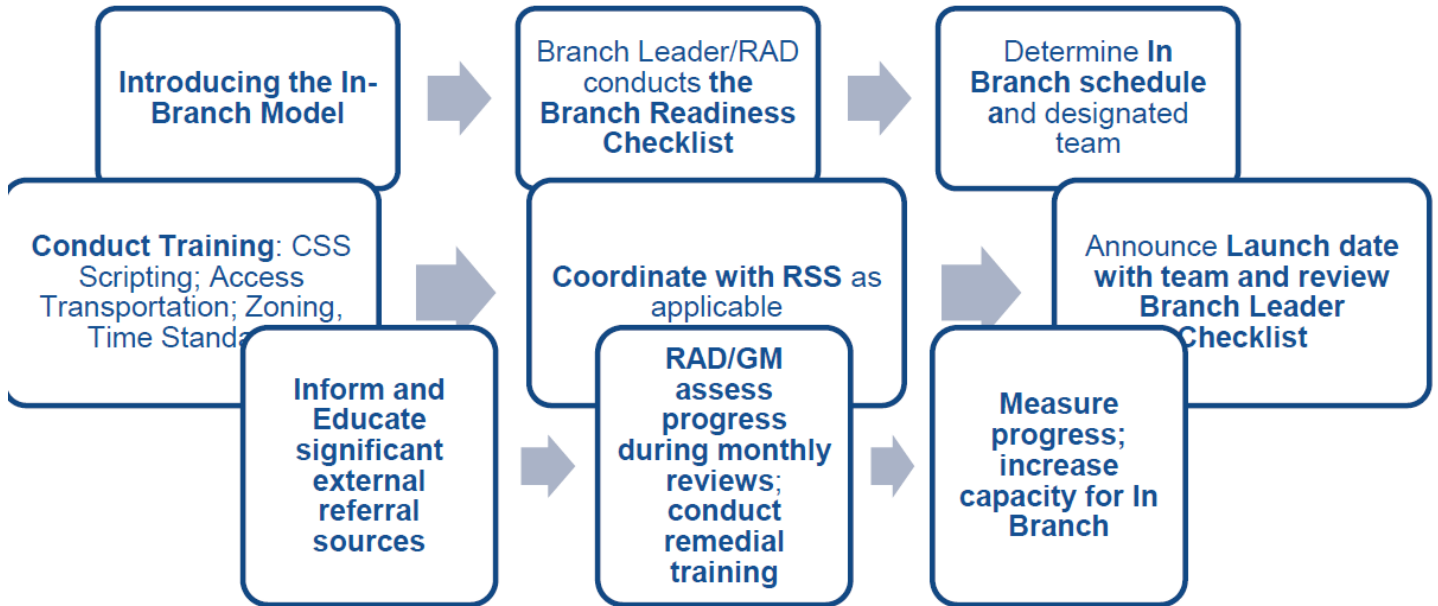
- The General Manager at each NSM Service Center should review and complete the internal [Service Center Site Inspection Checklist](#) that includes an ADA compliance audit and cleanliness and organization standards. Completed checklists should be submitted to the Regional Area Director and Division Vice President to ensure location meets requirements to conduct in-branch service appointments.
- NSM locations designated as a Service Center should have a working knowledge and list with contact information, for the customer, of the accessible transportation companies available in their service area. Every state has systems in place for accessible transportation. Refer to and update the [Accessible Transportation Directory](#) and reach out to your state Medicaid office, inquire with community service programs, public transportation, etc. to gather information for your office list. Local Advocacy groups may also have options for assistance.
- All Branch associate and RSS team members must demonstrate the skills competency to triage client inquiries. Triageing the client's needs determines how best to provide a reasonable outcome. Refer to the [Wheelchair Fundamentals](#) training course for improving knowledge management with triaging.
- Branch locations partnered with Remote Service Support (RSS) must have a singular Microsoft In-Branch Calendar for CSS and RSS appointment scheduling
- Existing branch locations partnering with RSS must convert to our new procedure in which the RSS team helps to drive consumers into our locations in the event of an unsuccessful [remote evaluation](#).
- Branch location must have defined zoning.
- Your location should start the In Branch Service model by assigning designated days; a minimum of three (3) days or a minimum of 24 hours; and scale to (5) days of the week a technician will be kept in-house for in-branch service appointments.
- Branch Teams must schedule a minimum of six (6) technical service appointments per day in the Service Center at the branch location.
- Service and Repair Time Standards must be utilized by branch and RSS teams to ensure proper allocation of time need to provide quality service.

### **Roles and Responsibilities**

- Technical Service Team
  - Must attempt **repair at evaluation** to capitalize the client appointment to increase probability of getting the equipment functional and safe for operation.
- Branch Team
  - Must attempt any follow-on or subsequent appointment attempts for delivery or install at the Service Center in the branch location and annotate in Mobility Advisor
- Branch Leadership Team
  - Must make attempts to schedule reoccurring repair clinic offerings in markets with significant repair work order volumes. Examining repair work order Days Order Outstanding data will inform.
- Region Leadership Team

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- Must examine all technical service vacancy opportunities to capitalize on the opportunity to onboard an In Branch Service Center technician and remove fleet vehicle as applicable.
- Must evaluate and determine branch technician fleet ratios aligned with operational needs. All technical service fleet vehicles at branch locations are subject to review, reallocation, or reduction.



Branch leaders to work with RADs/DVP's to have intentional planning sessions to ensure frictionless roll out.



**Procedure:**

NSM has created scripting for all branch teammates to utilize when interfacing with the client.

The Customer Service Specialist (CSS) AND Remote Service Support (RSS) team member should refer to the [CSS Common Calls Checklist document](#) for scripting for in-branch repair appointments and/ or utilize the following script. CSS: ***I would like to resolve your repair quickly. Let's schedule a Service (and/or) repair appointment. Our Service Center appointment options are as follows*** (list two available branch appointments).

It's important to note that all policies and procedures will still apply, advising clients of the potential for transfers, updating the Microsoft Outlook In-Branch Calendar along with the activity field for automated appointment reminders, reminding them of your service center address, etc.

At this point, the client may object to the Service Center appointment. Below is a sample list of objections and responses to overcome client objections. These examples should be trained on, and associates must be able to return demonstrate these competencies.



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Possible Client Objections	Sample Responses
I'm a wheelchair user, can't you come here?	Our service center appointment will resolve your repair much sooner than our next available home appointment." - Provide the client with estimated time lines for each type of appointment.
I don't have a vehicle available	Do you have accessible transportation? There are programs and resources in your area that provide this service at little or no charge? Keep in mind, these services are provided and available to you for this very reason. I see that you can call _____ to arrange transportation from your area, let me get you those numbers"
You've always worked on it here before. Why can't you come out to my home now?	Our in-shop technicians have more resources available to complete your repair quickly.
I can't sit there for hours in your branch while you work on my chair.	Unless there is a major issue, service appointments are typically under an hour long.
I can't bring the chair in, it doesn't work right now	Do you have support available that can help you bring in your chair/equipment?

Here are other areas we can gently point out to the customer:

- There may be significant difficulty and potential safety issues trying to replace parts in your home.
- Remind the referral source and the client that technology has advanced. CRT systems are specialized and/or computerized and require unique tools and/or technology to assess and repair that are more available in our service centers.
- Some client health plans do not cover evaluation, home visits, only repair of parts.

**Key Consideration:**

- When scheduling a consumer for a service center appointment we need to understand the transportation schedules so that consumers are not inconvenienced, and we need to be thoughtful around prolonged repair periods so that they can coordinate transportation pick-up. Evening and weekend hours should be considered.

Of course, there will still be instances when we cannot avoid a trip to assess what is required for repair service. **We can, however, schedule these instances only, when necessary, after proper triaging; unsuccessful remote evaluation by RSS or organically with branch technician occurs with management approval. If a branch delivery appointment is not possible, the following script should be utilized:**

CSS: *"You're very important to us and I'm sorry we can't service your equipment in our Service Center. Let me check to see when the next available appointment will be in your service area. We can at least assess*



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*for the repairs you need to back get you up and running. If there is anything we can resolve at this evaluation appointment, we will be sure to be prepared to do so.”*

At this point, a client’s repair appointment should be scheduled based on the severity of need based on triaging information, loaner equipment need should be noted if appropriate, and the repair appointment should be scheduled.