



# PRODUCTNAME® CUSTOMER SERVICE TRAINING V2.1

Last Updated: August, 2017

# Before We Begin

Please take a moment to watch the 12-minute video included with this training. It will give you an overview of how ProductName works and highlight key features.





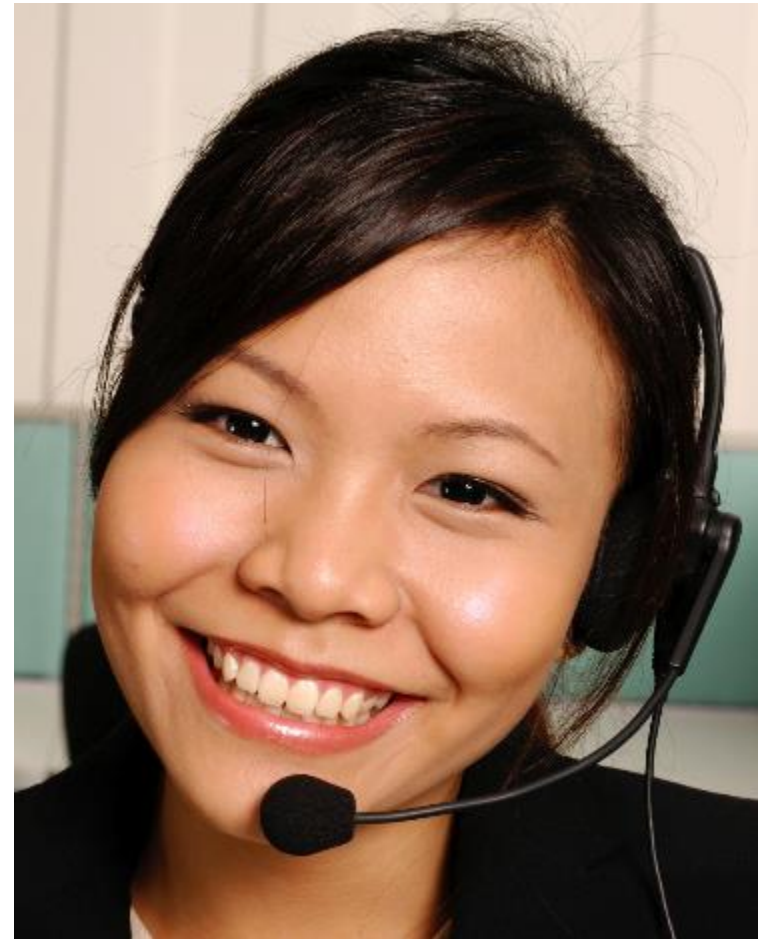
# Learning Objectives

Demonstrate the value of the ProuctName tool to plan members, by:

- Answering common questions about
  - Choosing a provider or facility
  - Accessing information about costs
  - Accessing information about quality
  - Understanding patient reviews
- Informing members about additional resources

Understand aspects of ProductName, such as:

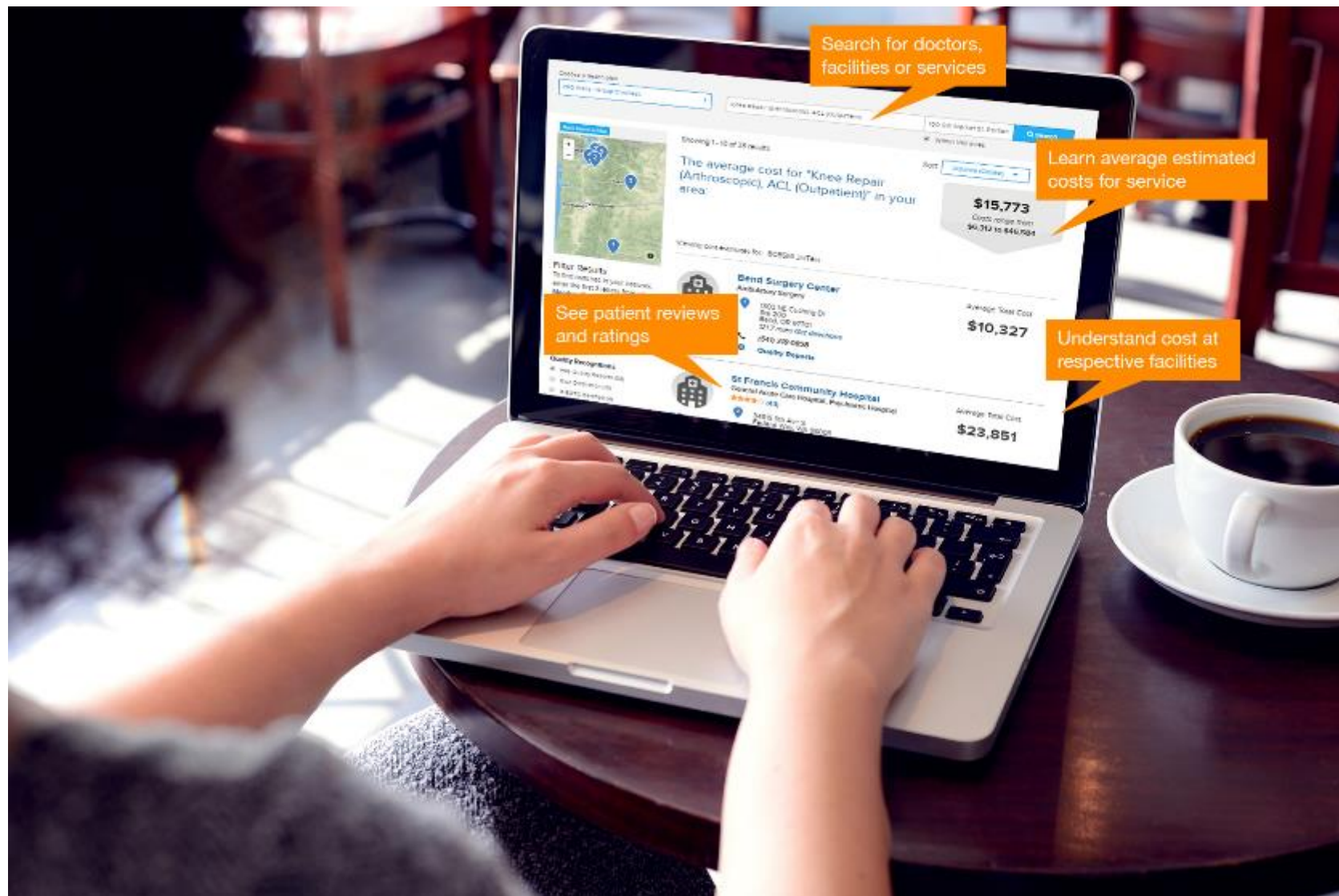
- Software version
- Triage of issues
- Supported browsers and devices







# Why ProductName?



# Use the Search Function



Hi, my doctor just retired. I think I might have contributed to her decision—*ha ha*—but I need to find a family practice physician. Can you help me use the search tool on the website?



I'd be happy to help. It's a great tool for getting the best care at the best cost. You can use a single search function to find providers and facilities and accurate information about quality and cost. All before you make any appointments!

Let's get you started searching for your new physician, but keep in mind that you can look up health care facilities or specific conditions—even body parts!—in the same place.

Choose a health plan

All Plans

Reset

Search for a doctor, hospital name, or condition

Location

Search



# Understand Provider Information



Before we start digging into to all the information that comes up, I want to let you know where it comes from. Is that something you're interested in?



Sure. I don't usually trust the Internet for reliable information. If I'm looking for a doctor, it would be nice to know where the info is coming from.



Great! Every week, we update the provider and network information. Providers contact us to make any changes to their information—such as their locations, the plans they accept, and so on.

You'll see that some providers have reviews. These reviews are submitted by plan members like you, and they're all carefully read by us, in case they indicate that there's any action we need to take.

You'll also find quality ratings like awards, certifications and similar things. That information comes from us, the health plan, and from accredited independent third parties.\*



# Find a Provider



So let's search for a family practice physician. You can enter any kind of word, from names of people or facilities, to medical specializations or conditions, or even names of body parts.

Type "fam" in the search box at the top of the home page. See how once you've typed three characters, the application starts to offer you options to select from various categories? Be sure to select from the dropdown list; otherwise, the search results won't be correct.

In this case, click "Family Practice."

Choose a health plan

All Plans >

Reset

Get estimated costs for hos

Connect with an Expert

Need help shopping for better health care? Call and ask your health care

Fam|

Family Practice

Family Planning

Family Health

Family Practice (Obstetrics Only)

Family Planning, Non-Surgical

Family

Family Medicine

Specialties

Specialty Synonyms

Location

Search

See Costs

Connect with a Doctor 24/7

Talk to doctors and specialists by video, chat, or phone anytime day or night.



# Specify Location



In the “Location” box, enter the name of the city you want to search in. Once you type three letters, the application starts to offer you options, just like when you were searching for “Family Physician.” Be sure to select from the dropdown list and then click “Search.”



Are there other locations I can search by?



Yes! You can search by address, city, county, state or ZIP Code. Of course, you can always enter a different location than where you are located, if you need to—if you’re traveling, for instance.

So wherever you are, you can use the application to find out how far away providers or facilities are—and even get directions!

Choose a health plan

All Plans >

Reset

Family Practice

Portland

Portland, OR

Portland, ME

Portland, TX

Search

Get estimated costs for hospital stays, MRIs, office visits, surgeries, vaccines, X-rays and more.



# Change the Search Distance



Another great thing about the search tool is that you can refine the results of any search.

You can do this a couple ways. Do you see the slider below the map? By moving it, you can change the search distance from your starting location. The default is 25 miles.

As you move the slider, the results will automatically update.

Showing 1 – 10 of 1,466 results

Sort: [Best Match](#) [Save & Print](#)

**Gluck, Lori F, MD** 12 Plans Accepted at this location  
Family Practice  
★★★★★ (5)  
15640 NW Lakdow Rd Ste 102  
Portland, OR 97229  
8.3 miles [Get directions](#)  
(503) 764-0100  
[Quality Reports](#)  
Accepts new patients

**Balderston, Leslie A, FNP** 13 Plans Accepted at this location  
Family Practice  
421 SW Oak St Ste 210  
Portland, OR 97204  
0 miles [Get directions](#)  
[More locations \(1\)](#)  
(503) 988-3663  
Accepts new patients

**Benecki, Eleanor A, PA** 17 Plans Accepted at this location  
Family Practice  
421 SW Oak St Ste 210  
Portland, OR 97204  
0 miles [Get directions](#)  
(503) 988-3663  
Accepts new patients

**Refine your results**  
Miles from starting point  
1 5 25 50 100

**Accepting New Patients**  
☐ Accepting New Patients (1,328)

**Show Primary Care Providers**  
☐ Eligible PCP Providers (245)  
☐ Accepting PCP Patients (200)

**Quality Recognitions**  
☐ Has Quality Reports (139)  
☐ Is PCMH Certified (114)

**Specialty**  
☐ Urgent Care Services (46)  
☐ Obstetrics (12)  
☐ Obstetrics & Gynecology (12)  
☐ Geriatric Medicine (7)  
☐ Multi-Specialty (7)  
[\[+\] Show more](#)

**ER Alternatives**  
☐ Urgent Care/Walk in (52)

# Narrow Your Search



You can also narrow the results of any search by using a filter.

Below the slider you can see a list of filters that can help you focus your search to meet your needs more specifically. For example, you can filter to see just those providers who are accepting new patients, are primary care providers or have quality recognitions.

As you select filters, the results will automatically update.

Showing 1 – 10 of 1,466 results

Sort: [Best Match](#) [Save & Print](#)

12 Plans Accepted at this location

**Gluck, Lori F, MD**  
Family Practice  
★★★★★ (5)  
15640 NW Lakdow Rd Ste 102  
Portland, OR 97229  
8.3 miles [Get directions](#)  
(503) 764-0100  
[Quality Reports](#)  
Accepts new patients

What you need to know before you go  
Click on a name to see costs, locations, languages spoken and a lot more.

**Balderston, Leslie A, FNP**  
Family Practice  
2 421 SW Oak St Ste 210  
Portland, OR 97204  
0 miles [Get directions](#)  
[More locations \(1\)](#)  
(503) 988-3663  
Accepts new patients

**Benecki, Eleanor A, PA**  
Family Practice  
3 421 SW Oak St Ste 210  
Portland, OR 97204  
0 miles [Get directions](#)  
(503) 988-3663  
Accepts new patients

**Refine your results**  
Miles from starting point  
1 5 25 50 100

**Accepting New Patients**  
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**Show Primary Care Providers**  
☐ Eligible PCP Providers (245)  
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☐ Geriatric Medicine (7)  
☐ Multi-Specialty (7)  
[\[+\] Show more](#)

**ER Alternatives**  
☐ Urgent Care/Walk in (52)

# Sort and Print Your Results



You have options for sorting your search results. By default, the Best Match displays on top. You can also sort results by Name A-Z or Name Z-A.

You can also print your results. This function will print only the page you are on.

Or you can export your results as a PDF file. Keep in mind that the file could be long, depending on your results.

Showing 1 – 10 of 1,466 results

Sort: **Best Match** [Save & Print](#)

**Gluck, Lori F, MD**  
Family Practice  
★★★★★ (5)  
15640 NW Leelanaw Rd Ste 100  
Portland, OR 97229  
8.3 miles [Get directions](#)  
(503) 764-0100  
[Quality Reports](#)  
Accepts new patients  
12 Plans Accepted at this location

**Balderston, Leslie A, FNP**  
Family Practice  
2 421 SW Oak St Ste 210  
Portland, OR 97204  
0 miles [Get directions](#)  
[More locations \(1\)](#)  
(503) 988-3663  
Accepts new patients  
13 Plans Accepted at this location

**Benecki, Eleanor A, PA**  
Family Practice  
3 421 SW Oak St Ste 210  
Portland, OR 97204  
0 miles [Get directions](#)  
(503) 988-3663  
Accepts new patients  
17 Plans Accepted at this location

**Refine your results**

**Miles from starting point**  
1 5 25 50 100

**Accepting New Patients**  
☐ Accepting New Patients (1,328)

**Show Primary Care Providers**  
☐ Eligible PCP Providers (245)  
☐ Accepting PCP Patients (200)

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☐ Geriatric Medicine (7)  
☐ Multi-Specialty (7)  
[\[+\] Show more](#)

**ER Alternatives**  
☐ Urgent Care/Walk in (52)

Why are markers missing?

What you need to know before you go  
Click on a name to see costs, locations, languages spoken and a lot more.


# Understand Provider Profiles



I've clicked on Lori Gluck. She's my friend's doctor, and she's close by.



Ok. When you select a provider from the list of search results, the Provider Profile appears. Let's look at the information there.



## Gluck, Lori F, MD

[Read Quality Reports](#)  
★★★★★ (5)

[Select PCP](#)  
[Compare](#)

**PRIMARY LOCATION**

15640 NW Laidlaw Rd STE 102  
Portland, OR 97229

Main: (503) 764-0100   12 Plans Accepted  
Fax: (503) 764-0166

8.2 mi. away  
[Directions](#)

**Languages Spoken:** Spanish, Castilian, English  
**Gender:** Female  
**Board Certifications:** American Board Of Family Medicine ([Verify Status](#))

**Specialties:** Family Practice  
**Group Affiliations:** No data available  
**Admitting Privileges:** No data available

### Education

**MD ((1998):)** Oregon Health Sciences University  
**Residency::** Oregon Health Sciences University

### Locations for *Gluck, Lori F, MD*:

15640 NW Laidlaw Rd STE 102  
Portland, OR 97229

**PRIMARY LOCATION** [More info](#)

# Use Cost Information



Hi, I just changed health plans, and my out-of-pocket expenses have gone up. I see on the plan website that there are ways to comparison-shop for procedures. Can you help me get my head around how that works?



Absolutely. Higher cost doesn't always mean higher quality. And all the information in the application can help you make choices that minimize your expenses while ensuring quality care.

Let me run through how it works, and I'll answer any questions you may have.



# Use Quality Information



I'm trying to use the website to look for a primary care physician. Can you help me understand how the quality ratings work? I don't understand all the categories and terminology.



Of course, I can help with that. There's a lot of information!

Do you have a particular physician you're already considering? If so, we can look at his or her quality reports and start understanding what it all means.

**Johnson, Leslie A. MD**  
● Read Quality Reports

**Primary Location**

**Legacy Clinics, LLC**  
1030 NW 22nd Ave STE 200  
Portland, OR 97210

Phone: (503) 413-8888  
Fax: (503) 413-8829

1.3 mi. away  
[Directions](#)

Accepts new patients  
21 Plans Accepted

**Language Spoken:** English  
**Gender:** Female  
**Board Certifications:** American Board of Family Medicine (Verify Status)

**Specialties:** Family Practice  
**Group Affiliations:** 1 Group  
**Admitting Privileges:** No data available

**Education**  
MD (1994): University of Washington  
**Residency:** Ventura County Medical Center

**LOCATIONS**

**REVIEWS**  
[Leave a review](#)

Be the first to leave a review  
It only takes a minute or two to rate your experience. And your review can really help others make smarter health care choices! To get started, click "leave a review."

**QUALITY REPORTS**

**Preventive Care and Screening Ratings**  
See what preventive screenings are offered by this provider, view provider ratings and learn how many patients were treated according to recommended guidelines. [Learn more >](#)

- (+) Cancer Screening
- (+) Diabetes
- (+) Heart Disease
- (+) Women's Health

**Process of Care Ratings**  
Process of care ratings provide important information about risks and dangers associated with various treatments and services. [Learn more >](#)

- (+) Appropriate Use of Imaging
- (+) Asthma Care
- (+) Depression



# Use Patient Reviews



Hello, I'm using the website to research prospective primary care physicians, and I have a question about the patient reviews I'm seeing.

I'm wondering whether your organization validates these reviews in any way. I mean, a review of a toaster on Amazon is one thing, but reviews of doctors are more serious, right? I'd just like to know whether these things are moderated in some way.



Sure, that's a totally fair question. All reviews are moderated for appropriateness before they are posted. I'd like to give you more details about the process.

# Supporting Topics: FAQs, Other Member Resources

Members will have other questions, in addition to those we've seen in this training. For example:

- Why can't I find my provider?
- Why can't I find a particular procedure?
- Can I email search/estimate results?

Fortunately, the **Product Name FAQs**, located in the page footer, has the answers to these and many other questions. The FAQs are updated periodically.

In addition to the FAQs, the ProductName footer contains links to other information to enhance your members' experience:

## Site Resources

About Cost Estimates

Opportunities

Choosing a Place of Service

Health Insurance Glossary

Conditions of Use

FAQs

## Eminence Health

Medical Care Groups

Read our FAQs

Find a PCP

Learn how claims are processed

Organized Systems of Care

Last updated 12/12/15.

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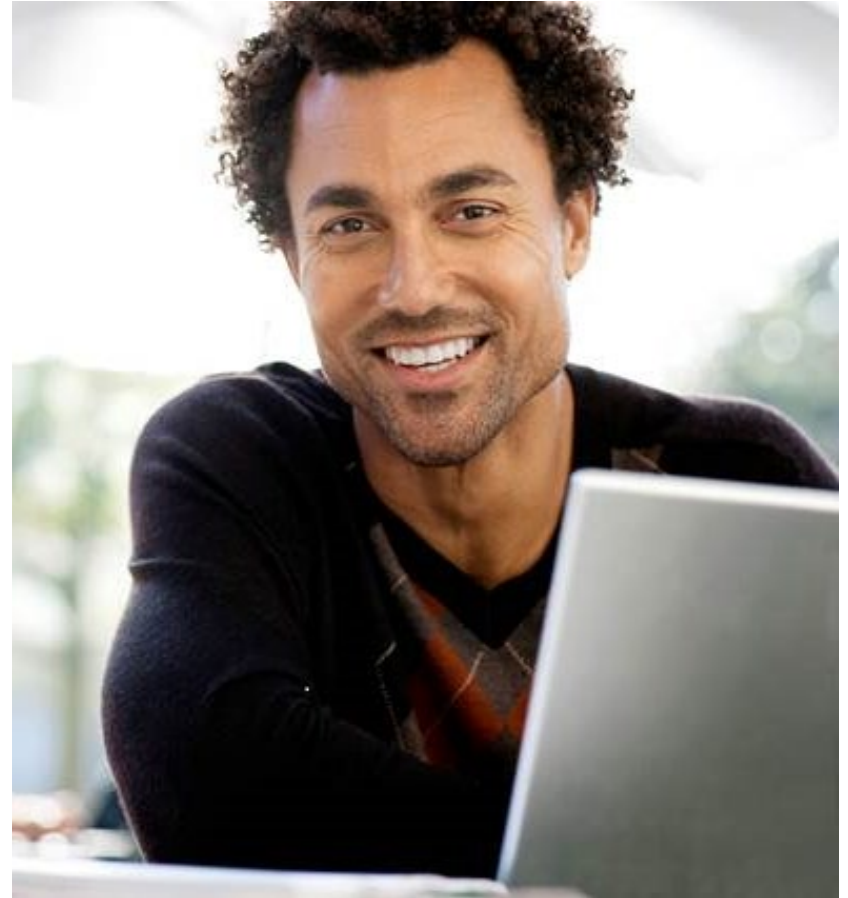
# Supporting Topics: Software Version

Do you and your members have the latest version of the ProductName application?

The answer is always, “Yes!”

ProductName, like all Company products, is offered as a “Software as a Service” (SaaS). This means your members are all using the same base software, and they all have the latest version.

And whenever there is an update or fix to ProductName, it is tested by Company and your team before it is made available to your members.



# Supporting Topics: Triaging Issues

Company respects the relationship you have with your members and will not communicate directly with them.

Questions related to:

- **Your organization**—about a member's coverage, plan, billing, anything internal to the plan and its policies and procedures—are entirely within the scope of your own plan's customer service organization.
- **How to use the ProductName application** should be addressed on the basis of this training and companion documents.
- **Specific to the technical operation of the ProductName application**—regarding error codes\* a member encounters, outages/interruptions in service, and so on—are taken by your customer service organization and reported to Company per your defined procedures.





# Supporting Topics: Mobile Experience

ProductName is mobile-optimized and was created using responsive design. This allows the application to automatically resize for smartphones, tablets and other mobile devices. No separate mobile app is needed.

If your healthplan offers a mobile experience, your members can access ProductName on the go. Check with your manager regarding whether ProductName has been integrated into your organization's mobile experience.





# Recap

Let's review what we've discussed in this training:

- Searching for providers and facilities
- Finding information on costs\*
- Finding information on quality\*
- Using patient reviews\*
- FAQs and other member resources
- Technical information about ProductName



# Extending This Training

We suggest adding these ProductName resources to your internal Customer Service knowledge base:

- Introductory video
- This CSR training
- ProductName Error Messages document



# Thank You



Thank you for completing this training!

We appreciate the opportunity to partner with you to empower your members to become smarter health care shoppers.