

BAFO Proposal
Broker Non-Emergency Transportation Services

Part 1- Technical Proposal

Prepared for

Washington D.C.
Department of Health

Submitted by:

Medical Transportation Management, Inc.
(MTM)

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US - from
Labor costs
Labor hours

Graphic Company
Companies
Attendants
Drivers
Vehicle

Technical Questions

1. Conceptual Transportation Network

Provide a description of your organization's conceptual transportation network as described in C.3.2 including the estimated number and type of transportation providers or vehicles as described in C.3.2.3.9 and C.3.2.4 and the number of drivers and attendants.

Based on MTM's experience in managing transportation programs throughout the nation, we have determined that the following number of transportation providers, vehicles, drivers and attendants are required to provide services for this program (based on our estimation of trips by mode):

	Annual trips	Monthly trips	Daily trips	# of Vehicles Required	Drivers	Attendants
Ambulatory van*	311,710	25,976	1,237	124	136	26
Wheelchair van**	85,400	7,117	339	56	61	12
Stretcher van***	4,270	356	17	4	5	2
Total	427,000	35,583	1,694	184	202	40
Total companies needed	37					

*Assumption for ambulatory mode one vehicle can accommodate 10 trips per day.
**Assumption for wheelchair mode one vehicle can accommodate 6 trips per day.
***Assumption for stretcher mode one vehicle can accommodate 4 trips per day.

2. Verify or define 'on-time'

Verify or define "on-time" with regards to the pick-up and delivery standards as described in C.3.2.3.4.

MTM's on-time arrival requirement is that the driver must arrive to the pick up point no later than 15 minutes from the scheduled pick-up time. The driver may arrive earlier than the scheduled pick-up time, but the recipient is not required to board the vehicle until the scheduled pick-up time. For return rides, the driver must arrive to the pick-up location within thirty (30) minutes of being notified that the recipient is ready for pick-up. Recipients must arrive on-time for their scheduled appointment time. Any deviations from these on-time requirements will result in the provider being documented as a late arrival or no-show. As detailed in our response, MTM tracks and trends on-time arrival performance information assesses liquidated damages for late arrivals and no-shows, and



serves transportation providers with timeliness issues with a request for a formal corrective action plan to remedy service issues. Provider's failing to consistently meet MTM's on-time performance requirements will ultimately be removed from the network of providers.

3. Gatekeeper Service

Discuss in detail the Gatekeeper Services as described in C.3.3.3.2 with a focus on the use of public transportation as described in C.3.2.4 as the appropriate mode of transportation.

As clarification to MTM's response, MTM will only assign public transportation when the recipient is able to access the public transportation system from both a cognitive and physical needs aspect. For example, those clients with permanent cognitive or mental disability limiting their ability to navigate the public transit system, or those clients in an advanced disease state will not be assigned public transportation, i.e., those client receiving dialysis, chemo or radiation, those clients attending MRDD programs, and those clients confined to a wheelchair will not be assigned public transportation.

For reference, see the following excerpt from page 26 of our original RFP response:

Other Intake, Gatekeeping and Trip Dispatching Functions:

Public Transit: MTM's NET Management system will alert the CSR if public transportation is an option based on the proximity of the recipient's pick-up and drop-off destinations to a bus stop. If public transportation is available, the recipient is ambulatory and has no medical condition preventing the utilization of public transit, the CSR assigns this mode for the recipient. MTM's NET Management System provides specific directions on how to get to the bus stop and the route and transfers necessary to arrive at the destination address. Bus or rail tokens and passes will be mailed from MTM's local office location.

Appropriate reasons for not accessing public transit are:

- Member lives further than 1/2 mile from a mass transit access location
- Is in a wheelchair and is unable to access public transit
- Is in the third trimester of pregnancy or has a high-risk pregnancy
- Has high-risk cardiac conditions or severe breathing problems
- Has a medical provider address more than 1/2 mile from a scheduled stop
- Has a permanent or temporary mental or physical disability precluding use of public transit

Review Process: Recipients requesting transportation other than public transit, personal mileage or ambulatory transportation minibus level (which includes all levels except wheelchair van) will be reviewed through MTM's level-of-need process. This process requires that a medical necessity form be completed by the referring medical provider validating the medical/cognitive need for a higher mode of transportation. Once a Medical



Necessity Form is provided verifying the need for a higher mode of transportation, the recipient can be approved for booking on higher modes of transportation. This "approval" for higher mode will be reviewed on a periodic basis to determine if the medical condition of the person changes or if there is a known change in medical status.

Should the physician indicate the recipient can travel by public transit, the recipient is informed this is the only form of transportation available. The CSR will arrange bus transportation if the recipient indicates to do so. MTM has found this process extremely successful in other markets in ensuring the appropriate mode of transportation is assigned to meet the needs of the Medicaid beneficiary. MTM believes this will allow for the highest utilization of public transit for the MAA program.

4. Clarifications regarding the constraints in the technical proposal
Provide discussion and clarification regarding the Constraints section of your technical proposal, pages 45 through 46, to include at minimum definitive statements of MTM's intent to provide the automated call distribution system (C.3.4.3.2 g-j), Videoconferencing (C.3.4.5), and Transportation Provider Rotation (C.3.3.3.6).

MTM will provide the automated call distribution system as described in section C.3.4.3.2. g-j and is included in this BAFO pricing.

MTM will provide the Videoconferencing system as described in section C.3.4.5 and is included in this BAFO pricing.

MTM will provide a transportation provider rotation program as required in section C.3.3.3.6; the following is our specific rotation plan:

Rotation Plan

From our estimations, we require at least 37 companies, operating 5 or more vehicles. Because this number is well below the current 200 plus number of transportation providers currently operating for this program, MTM plans to solicit proposals from interested transportation providers. Our selection methodology will rank transportation providers based on meeting MTM's required standards for:

1. Vehicle quality – Age of vehicles, number of miles driven, accurate maintenance records and the requirement of a minimum of 5 vehicles.
2. Driver and Attendant credentials – Experience providing non-emergency medical transportation service, clean background checks and motor vehicle checks, and appropriate training – Must have sufficient drivers for number of vehicles operated.
3. Insurance – Must have the contracts required minimum combined, single limit insurance level.
4. References – Must provide a minimum of three (3) references from medical facilities (i.e., dialysis center, long-term care facility, behavioral health facility) detailing the provider's service reputation and quality.



5. All submitting companies must guarantee their adherence to MTM's standard contract, guidelines and liquidated damages

Each bidding transportation provider must provide the above items to be considered for contracting with MTM. Once the above items are verified and reviewed, MTM will then evaluate the compliant providers based on price.

6. Pricing – Must provide mileage rate and matrix rate by zip code (per trip rate for transport between for the following categories) for all zip codes covered under this program. Each provider submitting a proposal must guarantee that they will provide service for all zip codes. Each provider may submit pricing for the following modes: ambulatory, wheelchair, and stretcher. Providers must submit a per hour attendant charge. A provider does not have to submit pricing for each mode, but must provide pricing for an attendant and guarantee the availability of an attendant.

The top 40 companies meeting MTM's requirements and providing the most advantageous pricing will establish the MTM network of transportation providers for this program.

Awarding of Initial Recurring Trips

MTM will assign the initial recurring trips to the providers based on the original evaluation criteria ranking. The top 10 providers based on price will be the "Tier 1" providers, the next 10 providers will be the "Tier 2" providers and then on down for "Tier 3 and Tier 4" providers. MTM will assign the recurring trips in the following manner (assuming 60% of trips are individual trips in nature, representing about 1020 trips per day):

1. Tier 1 Providers will each receive 5% of total recurring trips, i.e., 51 trips per day.
2. Tier 2 Providers will each receive 2.5% of total recurring trips, i.e., 26 trips per day
3. Tier 3 Providers will each receive 1.5% of total recurring trips, i.e., 15 trips per day
4. Tier 4 Providers will each receive 1.0% of total recurring trips, i.e., 10 trips per day

Rotation Plan for Non-Recurring Trips

After the initial awarding of trips MTM will rotate trip assignment in the following manner for all non-recurring trips and new recurring trips (assuming 40% of trips are individual trips in nature, representing about 680 trips per day):

1. Tier 1 Providers will each receive 5% of total non-recurring trips, i.e., 34 trips per day.
2. Tier 2 Providers will each receive 2.5% of total non-recurring trips, i.e., 17 trips per day
3. Tier 3 Providers will each receive 1.5% of total non-recurring trips, i.e., 10 trips per day
4. Tier 4 Providers will each receive 1.0% of total non-recurring trips, i.e., 7 trips per day

Annual Re-evaluation of Tiered Rankings

Annually, MTM will re-evaluate the tiered rankings based on the provider's trip turn-back ratio (how many trips did the provider not accept of those awarded), adherence to MTM's protocols, complaint rate, timeliness, billing accuracy and assessed liquidated damages. Based on the scoring of each provider, a provider may move up or down a tier. If any provider is removed from the network due to poor performance or if the provider elects to remove themselves from the network, the remaining providers, ranked lower than the removed provider, will move up in the ranking. MTM will then allow a new provider to



enter the network. The new provider will be the highest ranking provider of the original applied providers who were not selected for the original network. If the highest scoring provider is not available for whatever reason, the next highest scoring provider will be selected. This provider must be willing to meet all MTM's standards and requirements. If necessary, trips will be shuffled based on the above hierarchy due to the annual re-evaluation.

5. Staff Located in Central Business in Washington D.C.
Verify the staff to be located the Contractor's Washington D.C. Central Business Office (C.3.4.2.1.1).

MTM has completely revised our Staffing Plan, as part of this revision we clearly state that twenty-five (25), of the thirty-one (31), positions required to operate this program will be staffed full-time in MTM's local District office. For the Districts ease in reviewing the changes we have highlighted the changes in yellow shading.

Revision to MTM's Staffing Plan

C.3.4.2 Staffing, Organization, and Supervision

The Broker shall provide adequate staffing with the variety and required skill sets, organization, and supervision to successfully manage and administer the NET services program. The Broker shall, at a minimum provide the following required services:
Central Business Office (C3.4.1): MTM will staff the central business office with local quality and professional-minded individuals. We will hire individuals who possess the skill sets necessary to perform the tasks required. MTM will provide adequate and ongoing training to those we hire. In this way, MTM will ensure the District's protocols are adhered to, goals are met and our standards of quality are upheld. The DC central business office will have full administrative support and oversight from MTM's corporate headquarters. This will include accounting, quality, and technological support staff and systems.

MTM will establish a duly licensed, non-residential business in the District which will be open 8:00 a.m. to 6:00 p.m. ET (C.3.4.1). MTM will equip the business office with all the necessary and required hardware and software capabilities to perform the mandates of this RFP. All documentation and correspondence, written or printed material will bear the business office's address (C.3.4.1.1). The office will be staffed with a receptionist to facilitate business activities by recipients, MAA or District agency representatives. MTM will comply with all requirements of the First Source Employment Agreement Act in staffing the central business office and call center. See RFP DC Attachment D for a map of the central business office location. Within thirty (30) days after contract award, MTM will provide the COTR with an updated area map which identifies the central business office, any satellite offices and key area medical providers, hospitals and other sites relevant to NET service delivery (C.3.4.1.2.).

In some contracts and when permissible, MTM likes to give preference to hiring current or former TANF recipients for the CSC. We generally request assistance from the client in identifying these individuals. For example, in Arkansas, MTM conferred with Mary M. Parham, founder and CEO of J Kelly Referrals & Information Services, Inc. Mary started this unique community outreach business located in Little Rock in 1999, and in 2004 received three prestigious awards for her work and contributions to the community. J Kelly



began providing customer service center functions for the MTM DMS regional contracts in Arkansas beginning May 2004 and has provided excellent service. "At J Kelly, we make a concerted effort to create jobs for welfare-to-work persons, physically handicapped persons, visually impaired persons, and dislocated workers," Mary said. "Our mission is to focus all possible efforts as they relate to creating jobs for individuals that are otherwise viewed as hard to place." We will use Parham's experience and expertise in interviewing and hiring TANF employees.

Recruiting, Selecting and Maintaining Sufficient Staff

Day to Day Operations: MTM will fill key staff positions for day to day operations of the central business office and call center with local persons who are familiar with the community and have call center or NET transportation experience, depending on the position. MTM will fulfill all staffing, organization and supervision requirements as detailed in C.3.4.2. MTM will provide the COTR a staffing plan that identifies key staff and other support staff within thirty (30) days of contract award. We will ensure all DC staff receive appropriate training, support and supervision to effectively and efficiently perform the required services at the level of quality MTM has become known for. MTM will ensure the DC office is adequately staffed to perform the required services. We will use our proven internal formula to determine the appropriate number of CSRs necessary to meet the needs of this contract. We will make adjustments in the staffing as ongoing assessments indicate a need to do so.

MTM's Human Resources Recruiter will submit detailed job descriptions and expected job performance metrics to the DOES. MTM will select candidates referred by the DOES based on the referral's job history and related experience in the position sought. The Recruiter will check references listed and final selections will be made following an interview process. MTM conducts background checks on manager and higher positions.

Implementation Staffing: MTM's track record of successfully implementing other statewide and large capitated MCO NET programs speaks to our ability to rapidly and effectively install and manage a system on the scale of MAA's expectation of its NET program in a fiscally responsible way with no interruption in service. MTM has successfully implemented programs in states nationwide both when there was an existing broker and in cases when there was no broker, but transportation providers contracted directly with the state or agency to deliver transportation services. In either case, we implemented the program with no disruptions. Recipients were transported on time to scheduled appointments, transportation providers were notified in advance of scheduled trips, and facilities were able to provide necessary services to recipients who were scheduled for appointments.

MTM key staff consists of individuals responsible for implementation and ongoing management of the program (C.3.4.2.1.1). In our staffing plan, we have provided both MTM employees that will be responsible for day-to-day management and implementation of the contract from our corporate office. All MTM staff members are highly trained and skilled in program



implementations and ongoing program management. They have successfully started up over 36 contracts including three (3) state programs – Missouri, Arkansas and Minnesota - and three (3) large county programs – Albany and Orange County, New York, and Philadelphia, Pennsylvania.

MAA can be assured MTM staff will implement this program with a detailed process ensuring all key actions are identified on the work plan and executed succinctly – yielding satisfaction from all key stakeholders.

The executive overseer for this RFP is President and CEO, Alaina Maciá. At the helm of the Executive Management team, Alaina's role with the District's contract will be to oversee the Project Director for this program, whose responsibility is to ensure compliance with all contractual requirements and a smooth start-up of the new contract by overseeing all implementation action items. She will be the ultimate MTM authority for addressing all contractual, financial, technical and operational issues for the program. Alaina is fully committed to the management and operational success of the District's NET program.

Our staffing plan identifies the following positions:

Position	FTE
Project Director	1.0
Receptionist	1.0
Senior Manager Call Center	1.0
Customer Service Supervisors	1.0
Customer Service Representatives	11.0
Senior Manager Complaints and Grievances	1.0
Quality Service Representative	1.0
Quality Management Auditor	1.0
Senior Manager Education and Training Transportation Providers and Recipients	1.0
Transportation Provider Liaison	1.0
Network Representative	1.0
Routing and Public Transit Coordinator	1.0
Utilization Care Management Manager	1.0
Care Managers	2.0
Claims Auditor*	3.0
Finance/Accounting Support*	1.0
Senior Manager Information Systems*	1.0
Human Resources/Administrative Support*	1.0
Total Staffing	31.0

*Positions located at corporate headquarters, all other positions located in the local MTM District office.

Based on the above staffing plan, twenty-five (25) full-time employees will be staffed and located at MTM's local District office location. The staffing plan covers all aspects of the program: start-up, contract supervision, complaints monitoring, transportation provider contracting, call intake, gatekeeping and social services coordination. Also see the following related attachments: BAFO Attachment A



Organization Chart (C.3.4.2.1.3.), BAFO Attachment K- Resumes, BAFO Attachment L - Job Descriptions.

C.3.4.2.1 Staffing Plan

The Broker shall develop and provide a staffing plan that identifies at a minimum the Broker's Key Staff (C.3.4.2.1.1), other staff (C.3.4.2.1.2), and Organizational Chart (C.3.4.2.1.3) for the review and approval of the COTR within 30 days from Contract award. The Broker's Staffing Plan shall address at a minimum the following:

C.3.4.2.1.1 Key Staff

The Broker shall provide the following key staff:

- a. Project Director: The Project Director shall maintain sufficient authority to manage the allocation of resources to meet all Contract requirements without service interruption to Medicaid Recipients with overall responsibility for the DC-NET Broker functions. The Project Director shall be committed to the Contract for a minimum period of six months following Contract award, on-site within the District full-time during Implementation Phase and the first six (6) months of operation, serve as the District's single point of contact. The Project Director shall have demonstrated leadership experience, project management skills, knowledge of health care, Managed Care, Medicaid, and service to low income populations.

The Project Director works in collaboration with all MTM corporate departments and MAA to ensure MTM is fully compliant with the state's Medicaid requirements governing the NET program. The Project Director's primary responsibility is the management of the program, which will include making changes to staffing, processes and procedures when necessary to meet the requirements of the RFP and to meet client expectations. He/she is also responsible for working with the Provider Area Liaison to contract with transportation providers and ensuring they are monitored for adherence to the RFP specifications, as well as trained and credentialed. The Project Director reports to MTM's CEO and President based in Lake Saint Louis, MO, and will have the full support of all administrative functions at MTM's corporate headquarters in Lake Saint Louis -- in particular, the departments of Finance, Accounting, Technology, and Human Resources.

The Project Director is dedicated to the program and is responsible for ensuring all departments within MTM perform according to MAA-specific contractual requirements. He/she reviews utilization data and performance outcomes and addresses any issues that arise. The Project Director also educates MAA personnel on how to effectively use our reporting tools and will meet each month with MAA staff. During this session, we provide information regarding the program and work with MAA to determine potential improvement initiatives. See the Job Descriptions in BAFO Attachment L for the requirements of this position.

The Project Director for this program will be Shavon Anderson. Shavon was MTM's Project Director for the Philadelphia MATP program. Shavon's long career in Managed Care, specifically with background in Medicaid, and her experience managing the Philadelphia MATP program, Shavon is uniquely suited to providing superior project direction of the program. For the MATP program, Shavon ensured



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MTM's compliance with contract deliverables, met with medical facility staff and transportation providers to educate them on MTM's management program, train them on policies and procedures, and address issues and concerns. She has been trained on MTM's NET Management System, Complaints handling module, and transportation provider corrective action policies and procedures. She has worked hand-in-hand with MTM's Customer Service Center staff and supervisors to ensure compliance with gatekeeping requirements and trip assignment. As well, she has worked with MTM Care Managers to help appropriately assign and manage trip assignments for special needs clients such as, behavioral and mental health clients, both adults and children, severely disabled adults and children (i.e., cerebral palsy, Alzheimer's, dementia, etc.) and other at risk populations.

Through her hands-on management she identified the need for additional training for the drivers and attendants transporting behavioral and mental health clients, in particular children. Shavon independently developed and coordinated a training program for transportation drivers and attendants. She oversaw the mandatory training and attendance of over 200 drivers and attendants on Saturday mornings and afternoons. The training program had great success; drivers and attendants were better able to handle the issues related to this population, and issues and complaints from these transports decreased. This is just one example of how dedicated and hands-on Shavon has been in the management of the MATP program. Because of her superior management of the program, MTM was able to satisfy all stakeholders of the MATP program. As evidence to this the Pennsylvania Department of Public Welfare asked the new broker of the Philadelphia program to hire Shavon Anderson as their Project Director. Shavon remains committed to MTM and is looking forward to the opportunity to relocate to the District and manage this program with the same dedication.

The following are examples of Shavon's experience with project management, fiduciary responsibility, low-income populations and leadership:

- Organized and managed resources and implementations to deliver all functional work required to complete monthly member outreach and telemarketing projects within defined scope, time, and cost constraints.
- Provided oversight comprised of a detailed review of monthly management and incentive fee calculations, annual expense budgeting, and monthly bill processing. Provided vendor management: accounts payable, audits, coordination of annual audit, financial statements, and related information.
- More than 10 years MCO/HMO experience working with Medicaid, Medicare low-income recipients in Philadelphia, PA while employed with AmeriChoice, Oxford/OakTree and (Keystone) Mercy Health Plan in a variety of positions including: Member Services Representative, Provider Relations Representative, Community Relations-Marketing Representative and Program and Operations Manager. Worked consistently with a unique population including the underserved of ethnically diverse adults and children. As a healthcare advocate, educated recipients on preventive health and regularly encouraged consumers to get annual physicals and routine diagnostic and screening tests. Worked frequently with community-based network and organizations to



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ensure the absence of cultural and/or language barriers for LEP (limited-English proficient) consumers to make certain care was provided within the public sector health care unit.

- Throughout Shavon's tenure with AmeriChoice, she developed and executed appropriate communications and training to ensure the quality implementation of the Personal Care Plus Medicare program. As functional/process owner for performance management and employee development, she was responsible for developing key metrics to measure progress and success. Staff management and development included: recruitment, training and rewarding key talent to achieve execution excellence. She also led a group of 15 team members responsible for educating and assisting over 10,000 Medicare recipients. Additional functions included: managing work teams, change management, industry awareness, performance consulting, needs analysis, program evaluation and project management and all aspects of Program Operations.

Please see Shavon's resume in BAFO Attachment K.

- b. Senior Manager Call Center Operations (MTM's Customer Service Manager) - The Broker shall designate a senior manager with overall responsibility for performance of the Broker's obligations to enroll Recipients in Medicaid NET Program and oversee the Customer Service Hotline. This individual shall have authority over staff activities, and associated functions related to Recipient services.

The Senior Manager Call Center Operations (MTM's Customer Service Manager) position will be staffed with a local, full-time, experienced Call Center Manager with a background in Customer Service. We will search for a candidate with experience in Managed Care and Medicaid operations. This position will be responsible for hiring and training all Customer Service Representatives on MTM's procedures and protocols for the administration of this contract with a focus on promoting public transportation as the mode of choice where appropriate. This position will also be responsible for meeting call performance statistics ensuring accessibility. MTM will focus its search in order to hire an individual with experience in successful project management, servicing low-income populations, with proven leadership experience and the ability to manage the financial aspects of operating a customer service center.

This position will report directly to the Project Director, but will have dotted-line reporting to the Sr. Director of Customer Service Operations in the Lake St. Louis corporate office to ensure that the Customer Service Center is operating to MTM's standard operating procedures. MTM will look to staff this position immediately upon contract award, if there are any issues related to staffing of this position in a timely manner, MTM will temporarily staff this position with one of our current Customer Service Center Managers.

The Customer Service Manager will be assisted by Supervisors and highly trained Customer Service Representatives (CSRs) who will be dedicated to the program.



The Customer Service Manager, Supervisors and the CSRs are responsible for call intake, trip dispatch, gatekeeping, and customer satisfaction, please see job descriptions in BAFO Attachment L

Customer Service Representative(s):

MTM will employ highly trained Customer Service Representatives to handle transportation requests from DOH members. MTM's Customer Service Representatives will have extensive experience in the call center environment. We also look for people with medical/health care experience or transportation experience. They will be highly trained in the call intake and gatekeeping processes. Their primary duties are to receive trip requests, perform proper gatekeeping processes and to schedule eligible members on appropriate transportation resources. They must be able to type 30 correct words per minute in alphanumeric format, speak and write English correctly, have superior customer service skills and at a minimum have a high school diploma. We promote the hiring of bilingual (Spanish-English) CSRs to handle non-English speaking members, as well as other prevalent languages spoken per client location and based on related requirements.

- c. Senior Manager Complaints and Grievances -The Broker shall designate a senior manager with overall responsibility for the complaints, Grievance and appeal process. This individual shall have authority over the dedicated complaint telephone line including staff, activities and associated functions related to the complaint, Grievance and appeal process.

The Senior Manager Complaints and Grievances (MTM's Quality Manager) position will be staffed with a local, full-time senior manager dedicated to this position. This person's responsibilities will include assuring quality of service provided by MTM staff and all subcontractors, overseeing the resolution of complaints and grievances from providers and members, the development of analyses and strategic plans to facilitate quality process improvement, cost-containment, and integration activities within the utilization, care management, and quality management areas. This individual will also be responsible for overseeing the detection and prevention of fraud and abuse and ensuring member satisfaction surveys are completed quarterly with an analysis of the results. Through MTM's quality management processes, this Senior Manager will ensure all aspects of the NET program responsibilities are being fulfilled.

MTM will look to hire an individual with experience in successful project management, servicing low-income populations, with proven leadership experience and past fiduciary responsibility. This position will report directly to the Project Director, with dotted-line responsibility to the Corporate Quality Manager, Grecia Ibarra, to ensure that MTM's quality standards are being upheld. See the Quality Manager job description in BAFO Attachment L



Working with and reporting to the Quality Manager on a full-time basis will be a Quality Service Coordinator and a QM Auditor who will provide additional support as described below:

- The QSC will have the responsibility for handling grievances, complaint resolution and documentation, and the education of transportation providers and Medicaid members regarding the program and policies.
- The QM Auditor is responsible for ensuring transportation services requested are actually rendered through verification with medical providers, ensuring that fraudulent activities are detected, investigated and prevented, and monitors Customer Service Center performance, including enforcement of proper gatekeeping procedures, and assessment of member handling.

- d. Senior Manager Education and Training Transportation Providers and Recipients
The Broker shall designate a senior manager with overall responsibility to oversee all education/training and Outreach functions delivered by the Broker.

MTM will staff the Senior Manager Education and Training of Transportation Providers and Recipients with a local, full-time, senior manager with experience in outreach, education and training. This position will be responsible for coordinating driver/attendant training programs, medical provider training and outreach sessions, coordination with other Senior Managers for the training of staff on contract requirements, cultural sensitivity and other areas of training required for the management of this program. MTM will look to hire an individual with experience in successful project management, servicing low-income populations, with proven leadership experience and past fiduciary responsibility.

Reporting to this position will be a staff of individuals dedicated to contracting, credentialing, monitoring and maintenance of the MTM transportation provider network. These include the Provider Area Liaison, Network Management Representative, and Routing and Public Transit Coordinator; please see these job descriptions in BAFO Attachment L.

The District Provider Area Liaison will be responsible for training transportation providers on the requirements of this contract and performing on-site provider reviews. For this contract the Provider Area Liaison will be Darryl McAdams, please see his resume in BAFO Attachment K. Darryl has been the Philadelphia MATP Provider Liaison over the past year. He is fully trained on the functions of the Liaison and has been integral in helping MTM bring the Philadelphia network of providers into compliance.

During on-site reviews the Liaison inspects vehicles, audits licensure, reviews insurance and training certificates, monitors other requirements of MTM's Transportation Provider Guidelines, and offers support and assistance. The Liaison will also conduct on-street observations where he will ensure drivers are compliant with MTM requirements including adhering to traffic laws, wearing appropriate attire and identification, assisting recipients as required and providing timely service. He is also responsible for overseeing any corrective action plans a



transportation provider must carry out in order to comply with MTM's requirements as mandated by MTM's Quality Management Committee.

Also reporting to the Senior Manager of Education and Training is the Network Representative who is the dedicated coordinator for transportation providers for any questions, concerns and issues related to service provision. They also ensure that the transportation provider file is current and that all licensures and insurance remain current. Periodic audits by MTM's Internal Auditor are performed to ensure the Representative is maintaining MTM's compliance with these contract requirements.

- e. Senior Manager Information System - The Broker shall designate a senior manager with overall responsibility for internal information systems and the linkages to MMIS, EVS and IMA and future data warehouse to support the operations of data system for collection, analysis, and reporting of information.

Dan Carnesciali will serve as the Senior Manager Information System for this contract, he will be responsible for the IT and information services requested by DOH, transportation providers and other partners/subcontractors. This position performs all database management functions including: coordination of production data processing and reporting for clients and MTM staff, Electronic Data Interchange (EDI) and ongoing quality improvement of computerized processes. Dan will be responsible for MTM's NET Management System and the linkages to the District's MMIS, EVS and IMA systems to support the collection, analysis and reporting of all data and information. Dan has served in this capacity for both the Minnesota and Philadelphia County programs. He ensured that issues were minimized with the implementation of these programs through careful analysis, proper detailing of requirements and persistence in resolving issues. Dan will be fully committed to the implementation and on-going management of this program.

The following are examples of Dan's experience with project management, fiduciary responsibility, low-income populations and leadership:

- Served as Project Manager for the past 5 years and every project for which he was the owner the solution was delivered on-time. In his current capacity at MTM, Dan was responsible for the recent expansion of MTM's operations in Minnesota for the brokering of STS trips. Dan coordinated between the state program staff, IT staff and MTM operations team to deliver MTM NET Management System changes within two (2) months to ensure the flawless IT implementation of STS brokering. Dan is highly detail-oriented and will be an asset to the DC transportation program ensuring that the MTM NET Management System is modified appropriately to administer the program.
- Responsible and in charge of analyzing MTM's billing for the Minnesota program, which is a fee for service contract. Dan has been responsible for ensuring MTM's billing results in a greater than 99% payment, ensuring MTM meets a positive financial return on the program.
- Serves as Senior Business Analyst at MTM for Medicaid Non-emergency Transportation for the Minnesota transportation program, which delivers



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services to low-income populations. In this role, Dan has become acquainted with the needs of this population and ensures programming of the system meets MTM's client requirements for servicing this population.

- Experienced with low-income populations. Dan's leadership ability is showcased in his volunteering at the St. Louis City Jail, where he provides spiritual guidance and assistance. His unselfish desire to work with the less fortunate is an indication of Dan's ethics. He is a hard-working, honest and truly delightful person. The District will be pleased to work with him.

Other Staffing Required for MTM's NET Management Model

Utilization/Care Management Department: To effectively serve social workers and Care Managers booking trips for their Medicaid members, MTM developed the first transportation broker Utilization/ Care Management (UCM) department. This department will be local to the District and will be staffed with a Manager and two (2) dedicated District Care Managers who will serve as the key contacts for all social workers and facilities in the District. For job descriptions of these positions, see BAFO Attachment L.

Care Managers are responsible for arranging transportation for dialysis, behavioral/mental health, special requests, hospitals and nursing homes. They build solid relationships with social workers and hospital staffs, and improve coordination and customer satisfaction with the program. Care Managers also are responsible for reviewing long-distance, high-cost, frequent and higher mode of transportation requests for appropriateness.

Kirsten is very good! She always responds to concerns immediately.
Shelley Shultz, Helping Hands Care Center

The MTM care-management approach to transportation management is a very successful business model. Our unique approach combines a comprehensive needs analysis of members with an in-depth understanding of contractual requirements. The results have been remarkable. In every area where we compete head-to-head with other brokers, medical providers praise our management of non-emergency transportation services. The Care Management staff has consistently transformed the most frustrated care managers into staunch allies.

Our goal is to make transportation and related services a "non-issue" for people accessing health care services. The success of this department is evident in the strong support we receive from hospitals, dialysis centers, behavioral/mental health facilities and nursing homes in every area where MTM holds contracts. Central to our customer service approach is the fact that we are assisting medically fragile, highly-stressed individuals who have limited resources, while being fiscally and operationally responsible to our client. Additionally, the processes we developed to book reoccurring trips have resulted in significant cost and time-related savings.



Supporting the local District office will be several Corporate Support Staff; they will all be fully committed to the implementation and readiness review for this program.

Corporate Support Implementation Staff

Randall Baum is MTM's Chief Financial Officer. He is a Certified Public Accountant with extensive experience in all aspects of financial operations and is very knowledgeable in financial processes, procedures and guidelines. Randy has prior financial management experience in the health care and audit industry. He has worked for MTM since 2003 and was responsible for the successful move and consolidation of MTM's Accounting and Finance Departments from Kansas City, Missouri, to our corporate headquarters in Lake St. Louis, MO. Randy is responsible for the Accounting and Finance, Trip Reconciliation, and Bus Distribution Departments. His financial management responsibilities include cash management, monthly financial closings, internal and external financial reporting, accounts receivable, accounts payable, payroll, and the coordination of the annual independent financial audit. Randy is more than capable of ensuring MTM meets the financial reporting requirements of this contract. His responsibilities reside mainly at the company's corporate headquarters.

The following are examples of Randy's experience with project management, fiduciary responsibility, low-income populations and leadership:

- Certified Public Accountant (CPA) with extensive experience in all aspects of financial operations; Randy is very knowledgeable of financial processes, policies and procedures.
- Employed by MTM since January 2004 and was the Project Manager responsible for the successful move and integration of the MTM Accounting and Finance department from Kansas City, Missouri to the corporate headquarters in Lake Saint Louis, Missouri.
- Amassed senior financial management experience in healthcare and audit. Has worked with Medicare, Medicaid and Managed Care reimbursement by serving as the Regional Director of Finance for Tenet Healthcare System and prior to that, as Controller of St. Louis University Healthcare System.

For further information on Randy's experience, background, role and responsibility, please see BAFO Attachments K and L for his résumé and job description.

Randy manages the Finance and Accounting Department at corporate headquarters, which will be responsible for overseeing and managing all financial aspects of the program. MTM currently employs full-time, management-level accounting professionals who oversee the financial management of all programs. Additionally, they manage the following staff positions:

- Billing Supervisor – this position is responsible for ensuring transportation providers are paid only for services rendered in a timely and efficient manner. This position oversees the Claims Auditor and Reimbursement/Bus Specialist.
- Claims Auditor – this position works directly with the transportation provider, ensuring that trip reconciliation is completed accurately and on time.



- Reimbursement/Bus Specialist – this position mails, processes and accounts for all bus tokens and passes mailed to participants. Additionally, the position performs reimbursement verification and payment for recipients requesting mileage reimbursement and coordinates with facilities who distribute tokens and passes directly to participants.

The Finance and Accounting Managers will be responsible for ensuring MTM's financial reporting of the DOH program is timely and accurate, and will have the full support of the MTM Corporate Finance and Accounting Department. They will be responsible for establishing the reconciliation and payment of transportation claims. They will help ensure this function is staffed and trained for the readiness review.

The Director of Business Solutions is Alison Whitelaw, who assists in the identification and delivery of business information and business system solutions, including, but not limited to, management reports, data and information analysis, business system enhancement requirement specification, and business process improvement. She has been responsible for overseeing NET Management System enhancements based on operational and programmatic needs for over two years. She has served as a Project Manager for major system changes and rollouts including the shift from a matrix-based transportation payment system to a mileage-based transportation payment system, the design and rollout of the automated level-of-need process, and an electronic trip data transmission process designed for the Philadelphia MATP program to transmit trip information to transportation providers electronically to support the large number of trips processed through our Customer Service Center for this contract. Alison successfully completed the design and rollout of the electronic data interchange within one week to ensure MTM was ready to operate the MATP program due to a three (3) week implementation timeframe.

Alison will coordinate any changes to the MTM NET Management System necessary for the DOH program throughout the operation of this contract. Alison will guarantee that all NET requirements are facilitated, enhanced and automated through the MTM NET Management System, with a focus on solid project management to ensure reliable systems and operations. Alison oversees the Business Solutions Group, which is responsible for all electronic data interchange with MTM clients and transportation providers, data analysis, system enhancements, HIPAA compliance related to data transmission, etc.

The following are examples of Alison's experience with project management, fiduciary responsibility, low-income populations and leadership:

- Worked in the healthcare industry since 1999, developing innovative processes and technology to deliver health benefits and transportation services to both Medicaid and non-Medicaid populations on behalf of Managed Care Organizations, County and State government.
- Developed automated technology targeted at users with minimal educational background.
- Received written commendations from the U.S. Government and Fortune 100 companies for exceptional contributions, innovation and leadership.



- Amassed 20-plus years managing technology projects, leading cross-functional teams exceeding 50 staff members, and budgets in excess of \$12M.
- Manages the MTM NET Management System budget in excess of \$600,000 per year, including prioritization of enhancements, equipment upgrades and programming time.
- Served as a PMI Certified Project Manager since 2001.

For further information on Alison's experience, background, role and responsibility, please see BAFO Attachments K and L for her résumé and job description.

MTM's Information Systems Manager is John Rotert. He has been employed by MTM for over five (5) years in the positions of Systems Specialist, Systems Administrator and currently Information Systems Manager. John is responsible for the technology infrastructure and operations support of the MTM business operations, including, but not limited to, IT service desk, database administrations, network (LAN & WAN) administration, system health monitoring, telephony system management, system/business continuity, and information security/privacy. Recently, John successfully managed the implementation of MTM's conversions to a Voice over Internet Protocol telephony system in collaboration with our technology partners, CISCO and Sprint. John will ensure the District's local office is configured for both telephony and computer systems in advance of the readiness review.

The following are examples of John's experience with project management, fiduciary responsibility, low-income populations and leadership:

- Managed the telephony upgrade project at MTM's Pulaski, VA Customer Service site and the expansion of MTM's Minnesota business office for both voice and computer to a 52- employee office from a 25-employee office. This required close interaction with our local, long-distance and digital circuit carriers and our telephony vendor. The project was completed on time and without flaw.
- Manages the MTM telephony and computer systems budget in excess of \$700,000 per year with an eye on cost containment and system reliability.
- Managed IT deployment for MTM for over six (6) years with a focus on designing automatic call distribution flows for Medicaid transportation programs to ensure those from low-income populations can receive access to transportation easily.
- Volunteers and provides many individuals with support through his church community, which is a direct demonstration of John's leadership ability. A recent example is when he traveled to Baton Rouge, LA in 2005 to deliver a trailer sponsored by FEMA for a family to live in after Hurricane Katrina. John has high moral and work ethics and will be a great contribution to the District implementation team.

Please see BAFO Attachments K and L for his résumé and job description.



MTM's Director of Human Resources and Administrative Support is Patsy Heavey, see Attachments F and H for her résumé and job description. Her department will assist in the hiring process and benefits administration. Under her management she will guarantee that the District office is staffed and trained in advance of the readiness review. Her department also provides important administrative functions to facilitate building maintenance and cleaning, meetings, reception desk and other important duties. Reporting to the Project Director will be a full-time Administrative Assistant working out of the District business center and working with the Human Resources department for all human resources related paperwork and filing.

The following are examples of Patsy's experience with project management, fiduciary responsibility, low-income populations and leadership:

- Served as Project Manager for the successful staffing expansion of the Minnesota offices from a 25-employee operation to a 52-employee operation within two months, as well as for numerous project implementations over the course of her nine (9) year career with MTM.
- Creates and manages the Human Resource departmental budget and entire MTM payroll and benefits budget in excess of \$8.0 million annually.
- Manages the activities of the Benefits Administrator and commits to providing quality healthcare services to staff in the most cost-effective manner.
- Works with all department heads in creation and implementation of policies and processes for servicing low-income populations through MTM's transportation management programs.
- Serves as Board Member on the Workforce Investment Board of St. Charles County - an alliance of community leaders dedicated to developing workforce talent, strengthening business and promoting economic success.
- Volunteers as a member of the Evaluation & Quality Improvement Committee and Youth Council of the Workforce Investment Board.

Kimberly Shields is MTM's Senior Director of Customer Service Operations. She is responsible for the management and oversight of MTM's Customer Service Centers in Lake Saint Louis, MO, Pulaski, VA, St. Paul, MN as well as the oversight of our subcontracted Customer Service Centers in Topeka, KS and Little Rock, AR. Kim coordinates the hiring, training and staffing of the MTM corporate CSCs, and is responsible for ensuring that MTM meets NCQA (National Committee for Quality Assurance) call performance statistics. She is also responsible for ensuring MTM's Customer Service operations are cost-effective, while guaranteeing the strict enforcement of MTM and Client policies and protocols, including HIPAA compliance. Kim will hire and train the District's Senior Manager of Call Center, who will have a dotted-line reporting structure to Kim. She will help oversee the Call Center's readiness for the start-up of this program.

Most recently, Kim was the Director of Client Services and represented MTM to over 30 clients. She was responsible for contract compliance and client satisfaction. Kim was intrinsically involved in the Minnesota implementation and served as the Project Director for the Minnesota contract for a period of nine (9) months during



implementation and transition to a permanent Project Director. During that time, Kim worked with all parties involved to improve processes that enabled MTM to grow in Minnesota from 7 initial counties to 11 counties and expand the certification process for higher levels of transportation statewide.

The following are examples of Kim's experience with project management, fiduciary responsibility, low-income populations and leadership:

- Amassed 10-plus years experience in healthcare including commercial insurance products, network management and provider relations.
- Served 5 of the last 10 years specializing in Medicaid and Medicare Managed Care programs focusing on non-emergency medical transportation management for service delivery to low-income populations.
- Successfully demonstrated project management skills leading teams in implementation of programs, managing contract requirements, P/L management, provided education and training to medical community to resolve issues and develop new business strategies, developed staff to meet required performance standards, directed processes to ensure maximum reimbursement by educating and training staff on effective and efficient processes.
- Responsible for management of 5 Customer Service Centers including training and education, staffing, budget management, adherence to client protocols, satisfying performance standards, minimizing turnover, developing and implementing processes and standard operating procedures. Training includes sensitivity to cultural and socioeconomic factors of low-income populations to ensure access to transportation for this population.

For further information on Kim's experience, background, role and responsibility, please see BAFO Attachments K and L for her résumé and job description.

Tom Sweeney, MTM's Director of Network Management, has over 25 years experience in health care operations, insurance and managed care. He brings expertise to NEMT provider subcontract recruiting. He is experienced and creative in the contracting and formation of networks, joint ventures, and new products for all types of delivery systems – medical/surgical, dental, DME, pharmaceutical, lab, transportation, and other ancillary providers. His department's prime responsibility is our transportation providers. Please see his résumé and job description in **BAFO Attachments K and L**.

The following are examples of Tom's experience with project management, fiduciary responsibility, low-income populations and leadership:

- Served as the VP of Provider and Client Relations some 8 years for Blue Cross and Blue Shield of Missouri. In that role he had over 200 employees reporting both directly and indirectly. He was responsible for customer service as well as all provider relations and contracting, with oversight for contracting with physicians, hospitals, dentists, pharmacies, and all ancillary providers to create a statewide PPO network.



- Served as VP of Marketing and Managed Care for Saint Louis University Hospital and SLUCare for more than 3 years. Tom's responsibility there was for all managed care contracting on behalf of the hospital and the 400 physicians of Saint Louis University. He was also in charge of the physician outreach program and all marketing campaigns with a budget in excess of \$1.5 million per year.
- Responsible from 1998-2003 as the Regional Director of Managed Care for Tenet Healthcare St. Louis; provided oversight for all managed care contracting on behalf of the 5 Tenet hospitals in the St. Louis Region.
- Amassed tremendous background in and knowledge of managed care. This includes contracting with Medicaid and Medicare HMOs. Having been at the highest level of large organizations, Tom has always been responsible and has proven leadership capabilities.

He manages a staff of individuals dedicated to contracting, credentialing, monitoring and maintenance of the MTM transportation provider network. These include Area Liaisons, Network Management Representatives, and Routing and Public Transit Coordinators; please see these job descriptions in BAFO Attachment L.

The entire corporate Network Management Department under Tom's management, as well as the local Network Management staff, will ensure MTM has complete transportation provider coverage of the District's service area.

Grecia Ibarra, MTM's Quality Manager, has an extensive background in quality management processes and techniques, process improvement initiatives, oversight of complaints, grievances and incident resolution, tracking and reporting, and contract/performance monitoring. She will be responsible for helping ensure that the District Senior Manager Complaints and Grievances position is staffed and trained in the District's and MTM's policies and procedures, as well as guarantee MTM's readiness for the start-up of this program.

The following are examples of Grecia's experience with project management, fiduciary responsibility, low-income populations and leadership:

- Served as the Associate Director of Health for ARCHS (2003 - 2005) in St. Louis. Grecia was responsible promoting continuous access to quality health care in the St. Louis region, especially for low income and uninsured families.
- Served as the Local Project Coordinator of the MC+ (Medicaid/SCHIP) Coalition, whose main goal is to ensure that those children eligible to receive MC+ are enrolled in the program. Grecia ran a strong advocacy campaign to maintain benefit coverage and eligibility.
- Garnered extensive project management skills and has in the past created a resource guide that provided information about low cost or free clinics for the uninsured and low income families, which was widely disseminated and utilized in the St. Louis area.
- Re-engaged coalition members to actively participate in Coalition activities. Incorporated Hispanics where minority issues were discussed. Included new Hispanic Network to ARCHS' partnerships. Created awareness on Hispanic



issues, locally and statewide;

- Experienced leadership capabilities, which includes her membership on the Women's Health Council, Advisory to the Office of Women's Health for the MO Department of Health and Senior Services (2004 - present), the Senior Services task group for Health Communities of St. Charles County, and the Maternal, Infant and Child Coalition. Through her membership in these councils/coalitions, Grecia is a representative of MTM and brings information back to MTM about issues that members of our communities are experiencing including how MTM can address these issues through transportation access to healthcare services.
- Responsible for her departmental budget and all related spending considerations at MTM.

Please see Grecia's résumé and the Quality Management job description in BAFO Attachments K and L.

Robin Pinilla, LPN, fulfills the corporate Utilization/Care Manager position, she has been integral in establishing MTM's Care Management processes for both our Minnesota and Philadelphia programs. Through her management, MTM has increased satisfaction with medical facilities, shifted recipients to appropriate modes of transportation through level-of-need screenings, enhanced MTM's Care Management policies and procedures and worked collaboratively with MTM's Business Solution Group to develop an automated certification module in MTM's NET Management System. Robin will be dedicated to ensuring the smooth start-up of the District's program by ensuring proper staffing and management of the Utilization/Care Management program. She will tailor MTM's Medical Facility Manual specific to the DC program and ensure that it is disseminated to all participating medical facilities. She will also hire and train the Utilization/Care Manager dedicated to the District's program.

The following are examples of Robin's experience with project management, fiduciary responsibility, low-income populations and leadership:

- Extensive experience working with low-income, Medicare and Medicaid populations in the areas of LTC and heroin addiction through her work prior to MTM as a nurse.
- Serves currently as Manager in the Care Management Department; she works directly with healthcare providers in facilities that provide dialysis, mental health, and drug abuse treatment to assure adequate and appropriate transportation is provided to these populations.
- Experienced leadership capabilities include her participation in the Prenatal Subcommittee of St. Louis' Maternal Child & Family Health Coalition, whose mission is to reduce the incidence of fetal infant mortality and improve maternal, child and family health in the St. Louis Region.
- Coordinates numerous projects at MTM, including the roll-out of a new level-of-need certification program which required coordination with MTM's Business Solutions Group, the Customer Service Center and her Care Managers. Robin's attention to detail ensured the launch of the new



certification program was smooth for all parties involved, including clients and MTM employees.

- Experienced in areas of fiduciary matters, which includes managing her Departmental Budget and managing high-cost riders and frequent riders to help control MTM's transportation expenses.

Please see her résumé and job description in BAFO Attachments K and L.

MTM's Vice President of Internal Audit conducts reviews of internal operations under the direction of the President and the Board of Directors. Internal audits and reviews are conducted to streamline operations, improve internal controls and to prevent and detect both internal and external fraud and abuse. Jill Gillespie is currently the Vice President of Internal Audit for MTM. She is a CPA with prior public accounting experience in both financial audits and operations consulting. She has a keen eye for process improvement, which is enhanced by her years of experience with MTM. Jill has been with the company since 1999, serving in various positions including Controller and Vice President of Accounting and Finance, where she was responsible for the development and implementation of systems and procedures for financial reporting, cost accounting, trip reconciliation and fraud prevention policies.

The following are examples of Jill's experience with project management, fiduciary responsibility, low-income populations and leadership:

- Extensive project management skills, both from experiences at MTM and prior; some of those include her role as the Audit Manager for a regional public accounting firm responsible for engagement planning, staff training and supervision and completion of financial and compliance reports, the development and implementation of MTM's general accounting and cost accounting processes and retirement plan.
- Responsible for fiduciary duties at MTM including annual review and negotiations for employee benefits and complete oversight of MTM's finance and accounting functions as MTM's prior VP of Accounting and Finance.
- Experienced in working with low-income populations as she was responsible for compliance audits of low-income housing projects and tenants.
- Serves in leadership capacities, which include her roles as a presenter for continuing education for CPAs, President of the Sunday School program for children at her church and a Career day presenter for MO schools with the MSCPA society's "LEAP" program.

For further information on Jill's experience, background, role and responsibility, please see BAFO Attachments K and L. for her résumé and job description.

MTM's Executive Vice President and General Counsel is Donald Tiemeyer, he ensures MTM is adhering to federal, state and local laws and regulatory requirements; to advise MTM's Board of Directors and Executive team on legal matters; to develop and review all contracts (including contracts with clients, vendors and transportation providers); and to represent MTM in all legal matters. Don has served in this capacity at MTM since 1995, first through private practice and then formally beginning in 2003



as MTM's General Counsel. Don has extensive background in contracting, litigation and corporate legal matters, ensuring MTM is compliant with all contracts, state and federal licensing and regulatory matters. Don is also responsible for reviewing and negotiating MTM's general, auto and workmen's compensation insurance.

Don recently revamped MTM's Transportation Provider Contract, Guidelines and Liquidated Damages, and initiated standards for transportation provider driver credentialing that exceed client criteria and quality standards to ensure that MTM clients receive the safest and most professional transportation services possible.

Don is also head of MTM's Risk Management Committee, a subcommittee of our Quality Management Committee. All potential risk incidents are immediately referred to Don for investigation and appropriate action in response. Should MTM be involved in any incident or accident that involves litigation, Don supervises and coordinates the representation of MTM in court to ensure our and our clients' liability exposure is minimized. Don is also a member of the MTM Credentialing Committee, which reviews qualifications of transportation providers and their drivers, including criminal background history, elderly abuse, sexual abuse registries, and motor vehicle driving records. Don is MTM's HIPAA privacy officer and ensures MTM compliance with HIPAA privacy and security regulations pertaining to client and recipient protected health information data and records.

The following are examples of Don's experience with project management, fiduciary responsibility, low-income populations and leadership:

- Amassed 32 years of legal experience (24 years in the private practice of law) with commensurate fiduciary responsibilities to each and every client
- Represented hundreds of low-income clients on contingency fee basis, reduced fee basis, and pro bono (free)
- Served as Managing Principal and Partner of a private law firm for approximately 10 years
- Extensive knowledge of healthcare, Managed Care, and Medicaid through MTM's 36 contracts in 30 states
- Works closely with MTM's Executive management, Network Management and Operations managers and staff to ensure the medical transportation needs of client members and Medical Assistance recipients are met efficiently utilizing the most appropriate mode of transportation services, and with the respect and dignity that each person deserves
- Provides oversight for the more than 2.3 Million people MTM serves, of which the primary population are low-income individuals

Don is committed to the NET program in The District. For further information on Don's experience, background, role and responsibility, please see BAFO Attachment L for a copy of his résumé.

Alaina Maciá, President and CEO, has over three years experience managing MTM operations, technology, finance, accounting, legal and marketing activities, reporting directly to the Board of Directors for all business matters, and acting as the Executive liaison for all contracts in regards to contractual and operational matters. Additionally, Alaina provided oversight for the implementation of three state programs – Philadelphia County, Pennsylvania, Minneapolis/St. Paul, Minnesota, and Arkansas – and various other contracts, including the Orange County, New York, program. Her experience managing all MTM operations and current contracts ensures the District that the NET contract will be managed appropriately and with excellent customer service, as Alaina prides herself on superior customer service and quick response time to any issues.

Alaina's background and education in Engineering (BS) and Business Administration (MBA) from the prestigious Washington University in St. Louis, Missouri, ensures the District that a person with the aptitude for project management, technical enhancements, financial acumen, and operational expertise is overseeing the performance of this contract.

The following are examples of Alaina's experience with project management, fiduciary responsibility, low-income populations and leadership:

- Led the successful start-up and implementation of three state contracted non-emergency transportation programs: Arkansas, Philadelphia County and Minnesota.
- Successfully consolidated MTM's finance and operational departments from two separate locations in the state of Missouri (Kansas City and St. Louis) to one central St. Louis area location.
- Responsible for the profit and loss of the entire MTM operations with annual revenues in excess of \$70 million.
- Oversees staffing and the management of over 250 employees.
- Represents MTM at Advisory Committee meetings for MTM non-emergency contracts to educate Medicaid and low-income populations on their rights and responsibilities with regards to the transportation program.
- Developed Medicaid recipient bulletins, at-a-glances, FAQs, and other educational information to ensure recipients understand the transportation program and how to access transportation to their medical appointments.
- Provides in the capacity of CEO, key leadership to all employees for this rapidly growing company. Additionally, as a representative of MTM to clients, legislators, recipients, transportation providers and advocacy groups to ensure all parties are fully aware of MTM, its policies, procedures and mission to provide healthcare access through quality transportation management.

Alaina's résumé and job description will follow in BAFO Attachments K and L.



Conclusion: Our staff offers a wealth of experience in managing NET programs. They have the specific knowledge necessary to ensure this program's service requirements will be satisfied. Our years of hands-on experience will foster innovative programs and strong relationships with the DOH program staff. MTM has successfully started up over 36 contracts including five large-scale programs – Missouri, Arkansas, Minnesota, Pennsylvania, and Orange County, New York—along with operations in thirty states. MTM is pleased to offer DOH its highly-qualified, knowledgeable and capable team. DOH can be assured that with this staff in place, every aspect of the District's program will be handled efficiently, effectively and most important, responsibly. This staff will be available for Readiness Reviews with the District. Additionally, MTM recognizes that the District will have the right to require reassignment or removal from the contract any staff found unacceptable to the District. We have provided résumés, job descriptions and qualifications for MTM employees responsible for the implementation and ongoing oversight of the program from MTM's corporate headquarters in Lake Saint Louis, MO. See résumés and job descriptions provided in BAFO Attachments K and L.

Senior Managers shall have demonstrated project management skills; fiduciary responsibilities, knowledge of healthcare, Managed Care, and Medicaid; experience with low-income populations; and leadership experience. As described above, MTM's Senior Managers either currently have or will have demonstrated project management skills, fiduciary responsibilities, knowledge of healthcare, Managed Care and Medicaid, as well as experience with low-income populations. Through their experience at MTM and in prior positions, they have or will have demonstrated high degrees of leadership capabilities.

C.3.4.2.1.2 Other Staff

The Broker shall maintain sufficient levels of supervisory and support staff with appropriate training and work experience to perform all Contract requirements on an on-going basis, ensure that its staff responds to the COTR's requests for documents and information and COTR's questions and requests in a timely and efficient manner. The Broker shall maintain at a minimum the following:

- a. Supervisory Staff shall be readily available to the Broker's staff in person or by telephone during all hours of operation.

MTM's staff, including all Senior Managers, as well as Supervisory staff, will be available during all hours of operation to support any requests from the COTR.

- b. Support Staff
 1. Network Development Staff shall handle the negotiation and enforcement of Contracts with the Transportation Providers and monitor insurance certificates on a daily basis to ensure all insurance policies are current.

Please refer to the above description of MTM's Network Management department which shall be responsible for the negotiation and enforcement of MTM's Service Agreements with transportation providers. This department monitors insurance certificates by random desk audits and on-site audits in which they request a current copy of the transportation provider's insurance



certificate to ensure compliance with MTM's and the District's insurance requirements.

2. Readiness Review Staff -The Broker shall provide sufficient staff devoted to the readiness review process.

Reference above MTM's Corporate Support Implementation staff who will be dedicated the District's readiness review process and ensuring MTM is ready to provide quality transportation services to the District's Medicaid recipients on the go-live date.

3. Customer Service Representatives – The Broker shall provide customer service representatives for the call center to receive, schedule, and assign NET services.

MTM intends to staff eleven (11) Customer Service Representatives, one (1) Customer Service Supervisor, and one (1) Senior Manager Call Center to provide superior customer service in the way of receiving, scheduling and assigning NET services. These staff will be located in the local MTM District office. Please see above detailed staffing plan for further information.

4. Complaints and Grievances Staff - The Broker shall maintain the necessary staff and resources needed to expeditiously resolve, complaints and issues identified by the advisory group, surveys and or complaints filed.

MTM intends to staff one (1) Quality Service Coordinator and one (1) Senior Manager Complaints and Grievances whose responsibility shall include expeditiously resolving all complaints and issues identified by the District Advisory Committee, the Recipient Satisfaction Survey, and complaints filed directly with MTM. They will report directly to the Project Director and will assist her in resolving all issues to the satisfaction of DOH.

The District shall have the right to require reassignment or removal from the Contract of any staff found unacceptable to the District.

MTM understand and agrees to this requirement.

C.3.4.2.1.3 Organizational Chart

The Broker shall develop an organizational chart to be included in the Broker's Staffing Plan (C.3.4.2.1). The Broker's Organizational Chart shall clearly depict the following:

- a. Total Number of Staff by positions;
- b. Reporting lines and supervisory levels of staff;
- c. Position Descriptions to support the organizational chart including minimum qualifications for each position included in the organizational chart and training and education requirements; and
- d. Vacant positions.

Please see BAFO Attachment A for an updated Organizational Chart based on MTM's revision to our staffing plan for this program.

Additional Technical Clarifications:

MTM would like to add the following clarifications to our technical response in order to enhance our proposal:

After Hours Call Center Location

MTM's after hours call center for the District office will be the corporate headquarters call center, which has the support of MTM's IT Manager, Customer Service Manager and Human Resource Department. These support staff help ensure 100% reliability of our after hours Customer Service Center and access to the District's Medicaid recipients at all times.

6. Technical Proposal Attachment

Provide additional information and detail to describe the following Technical Proposal Attachments:

- a. Conceptual Public Transportation Policies and Procedures (L.2.1.4.1.2 c)

See BAFO Attachment J for our Public Transportation Policies and Procedures.

- b. Conceptual Transportation Provider Training and Education Plan including the following(L.2.1.4.1.2 d):

1. Transportation Provider Orientation
2. Comprehensive Training and Education Sessions
3. MRDDA waiver Recipients Training Course
4. Training and Education Evaluation Tool Conceptual Notification of and Outreach of NET Services

At Medical Transportation Management, Inc. (MTM) Provider Education occurs over the life of the contractual relationship. Provider Education is not just at one time. Nor is provider education always in formal group fashion. Obviously, at the start of the provider relationship and at the start of a new client program, the education is more frequent and more intense. As a result of the ongoing duties of the Reps and Area Liaisons and their part in education, the faxing of educational notes to providers for issues of common concern and interest to all providers, and the sponsorship of annual provider meetings, MTM has created a comprehensive



ongoing provider education program. See BAFO Attachment B for MTM Conceptual Training and Education Plan and an updated Transportation Provider Manual for our subcontracted Transportation Providers. Upon award these manual would be further customized the District.

- c. Conceptual Recipient Initial Notification and Newly Eligible Notification (L.2.1.4.1.2 c, d, f, and g).

Initial Notification

At the onset of the program initial notification or Recipient Notification Letter, the letter would explain the transportation program in detail including informing the recipient of availability and advance scheduling rules. The first mailing would include all recipients who are current users of the transportation program. This mailing would be sent to all current head of household enrollees based on a file from the District. We customize the letters based on each program requirements. The initial recipient notification letter would include, at a minimum, the following:

- The availability of NET
- A description of NET services
- How to contact MTM?
- What transportation services do we provide?
- How to schedule a ride?
- When should I call to schedule an appointment or ride?
- How far can I go or travel?

The above letter would be mailed at least 45 days prior to the start of the program. MTM understands that the District must prior approve all materials distributed to the recipients.

Newly Eligible Notification

DHS recipients can be added and removed through out the contact, MTM NET System can create a report daily as new recipients are added to our daily download from the District. MTM NET System can also be designed to generate a Newly Eligible Notification letter which will be mailed daily to all recipients identified. The newly eligible letter would be the same as the initial notification letter. (See BAFO Attachment C)

- d. Conceptual Recipient Education Plan

At Medical Transportation Management, Inc. (MTM) Recipient Education occurs over the life of the contractual relationship. Obviously, at the start of the contract the education is more frequent and more intense. See BAFO Attachment C for our Recipient Education Plan.

- e. Conceptual Staff training and education plan development (L.2.1.4.4.1.2 g)

MTM works diligently to keep our staff up-to-date with training and education on all items concerning our standard procedures and client protocols. Training begins the first day of employment and continues throughout. Each employee will be



MTM

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educating on the Companies Policies and Procedures and HIPAA compliance. Then depending on the department the employee and their responsibilities training will be up to their Manager. For this contract we have included our CSR Training manual for your review. Our CSR Training Manual (See BAFO Attachment G) is considered Confidential and is so marked. You will also find our Staff training and education plan in BAFO Attachment D.

f. Conceptual Training and Education Plan Presentation and Materials (L.2.1.4.4.1.2 h)

MTM provides each CSR with a complete training manual. See BAFO Attachment G. This manual is reviewed and updated at a minimum annually. This training manual includes:

- a. MTM history
- b. Overview of each department
- c. HIPAA guidelines
- d. Medical Terminology
- e. How to work MTM's phone system
- f. Detailed step by step instruction on how to setup trips with screen shots and instruction
- g. How to schedule urgent requests
- h. Cultural Diversity, dealing with difficult callers, sensitivity training and phone etiquette training materials
- i. Required forms used in the Customer Service Center
- j. Samples of reports used to monitor performance
- k. Outlook instructions
- l. Client Specific protocols, contact lists and other pertinent related information to assist the CSR
- m. AT&T language Line and Relay instructions
- n. Policies and Procedures
- o. County by County Reports
- p. Transportation Provider Lists

This manual is reviewed and updated at a minimum annually.

g. Systems Design Manual (L.2.1.4.4.2.2.1 c)

MTM has reviewed our original response as it relates to our Systems Design Manual. In our original response we identified the following manuals that we use as training for MTM staff and our subcontracted transportation providers: MTM's Operations Manual, Transportation Provider Manual, Systems Manual, Users Manual and Quality Assurance Plan. MTM included these manuals in our attachments for the Districts review. However in regards to the Systems Manual, we only included the Table of Contents. This is because we consider our Systems Manual proprietary, trade secret and confidential. MTM's NET Management System was specifically created and customize for MTM. The NET Management System is not sold, licensed or used by any other organization. It is for this reason that we can not include our Systems Manual. We have included



our Customer Service Manual that details how the NET Systems Manual provides dispatching and scheduling services. We have also included detailed information on our state-of-the-art telephony system and our systems redundancy, see BAFO Attachment E.

Unified Telephony Systems overview

MTM utilizes a state-of-art Voice over Internet Protocol (VoIP) telephony system at all of our sites. Cisco CallManager and Cisco IP Contact Center (IPCC) were chosen to handle the everyday business calls as well as Automatic Call Distribution (ACD) to our Customer Service Centers (CSC). Fax duties are handled by Captaris' RightFax. RightFax handles all inbound and outbound faxing needs. MTM personnel are able to fax from their desktop computer utilizing RightFax. All inbound and outbound ACD calls are recorded for quality concerns via Intelrex's CallRex application. Recorded calls are able to be searched and retrieved by a variety of criteria. CSC Supervisors are able to monitor all aspects of the ACD System. Supervisors can monitor all ACD activities of every Customer Service Representative (CSR) in their direct report. ACD reports are generated daily, weekly and monthly utilizing Cisco Historical Reports Scheduler. Voice Messaging is handled by Cisco's Unity Voice Messaging System (Unity). Every MTM employee has a Unity account which allows them the ability to receive voice messages. We also utilize Unity in our ACD scripts to allow callers to leave messages which will be returned promptly. As you can see, MTM has invested heavily in a converged telephony system to meet our current and future needs for call handling.



MTM

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MTM Attachment R

Customer Service Handling the Difficult



Effective Management Resulting in Appropriate Utilization

June 2004

The enclosed information contains business practices, operation and other private information of MTM and is proprietary and highly confidential. This confidential information shall not be disclosed without the express written consent of MTM.

MTM Attachment R
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HOW TO CONTROL THE CONVERSATION

Step 1-Prepare for the conversation mentally/physically

Regardless of whether a call is unexpected, prepare yourself mentally as soon as you pick up the phone. Ask yourself the following questions:

1. Who is the caller?
2. What does he/she want/need and when?
3. How do I say “no” in a positive and professional way if I can’t meet their need?
4. How will I respond if the caller reacts negatively?
5. What kind of mood am I in right now?

Step 2-Control your emotions

Identify a potential problem call and begin planning how to handle it.

- ❖ Focus on what the caller wants/needs and what you can realistically deliver
- ❖ Listen as a Customer Service Representative and don’t take remarks personally
- ❖ Recognize when callers try to anger or intimidate you-avoid the trap
- ❖ Listen to your tone of voice to remove any defensiveness
- ❖ Consider difficult callers a challenge and not a nuisance
- ❖ Ask yourself “How do I feel about callers who never have the needed information? Keep your own prejudices in check

Step 3-Direct questions or probes

Although it is important not to interrupt, it becomes necessary in order to get needed information.

- ❖ Make sure your questions are specific
- ❖ Allow the person time to think through his/her response. If there is a great deal of hesitation, provide additional information or reword your question.
- ❖ Avoid interrupting the caller in mid-sentence
- ❖ Be aware of your tone of voice.

TAKE CONTROL OF THE CONVERSATION

If you spend a lot of time on the telephone, it is important that it is spent efficiently. It is important, however, for callers to feel a sense of participation.

Ask Questions

Ask questions you want the conversation to focus on. Questions lead callers to believe they are in control because you take the time to ask them for their opinion or information. The caller feels important, yet you are in control.

Give Callers Options

Giving callers options does two things: it gives you the opportunity to control their response, and it leads them to believe they are participating and have choices. Here are options you can offer callers:

“Is a 10:45 or a 2:45 appointment better for you?” (when there is no specific appointment time)

“Do you prefer to have a message left at your home regarding your ride tomorrow or call back in later?”

Tell Callers What You Are Going To Do

We've all felt helpless on the telephone...when we've been put on hold, transferred to several departments and still not talked to the right person.

When we do this to callers, we are telling them they have no choice and certainly no control over the situation. These feelings produce frustration and a negative impression of you and your company.

When transferring callers, give them the name of the department and the person you are connecting them with. If you need to place callers on hold, tell them so. If you have trouble finding the person they are trying to reach, explain the situation, then give them options.

“The person you are trying to reach is away from their desk. Would you like their voicemail or would you like to call back in later?”

Know Your Resources

Knowledge of your company; its departments, its accounts and services are invaluable for exercising maximum control over your telephone conversations.

UNHAPPY CALLERS

Sometimes, regardless of how effectively and efficiently you do your job; there will be a few unhappy callers.

- Deal with the callers' feelings first and then with the problem.
- Make sure you know exactly what the problem is.
- Apologize for any error on your part or the Company's.
- Present any possible solutions or alternatives. Only offer those solutions or alternatives that you have the authority to. *If in doubt, see your supervisor.
- Make realistic commitments and follow-up.
- Hold to your position.
- Inform your supervisor of potential complaint cases.
- Stay in control of your emotions.

***Check with your manager on how you should handle callers who insist on being abusive.**

THE SOLUTION OR ALTERNATIVES

Handling an irate person is easy when you can solve the problem. If you can, say so immediately.

The tough part is when you cannot give people exactly what they want. In this situation, outline the alternatives.

Examples:

- “I will check into this right now, and will call you back within 1 hour.”
- “Here is a possibility.”
- “You can...”
- “We do have...”
- “There is an alternative.”

Always have an alternative in mind. This will show your sincere interest in resolving the situation. Saying, “There is nothing I can do,” will sometimes make it worse.

HOW TO HANDLE AN ANGRY CALLER

Think about the last time you talked to (or tried to talk to) an angry caller. Were they angry with you? Or were you just the unfortunate one who picked up the telephone? Chances are they were not angry with you personally or even your company. Some outside source caused their negative feelings.

The first and most difficult step is to DETACH YOURSELF from the hostility. While you may understand that the caller isn't upset with you personally, it is still hard not to react defensively to his or her negative attitude. To maintain control of yourself and the situation, you must remain professional.

Let Callers Vent Their Anger

The fastest way to diffuse angry callers is to let them "blow off" steam. Don't interrupt. Let them talk and get whatever is bothering them off their chest. Remember, it takes two to sustain a conflict. If you respond, then they have engaged you in an argument. Wait. Hear them out. The caller probably is upset by something else in his or her life and is taking it out on you. Frequently, it is easier to vent anger at a stranger than deal directly with the person or situation that upset you.

Allow an angry caller to vent their anger by listening, not responding. Let them say whatever they want. If you respond, it will probably be seen as a rebuttal. The caller thinks you disagree with him or her. This only escalates an angry situation.

Some people think this venting process is too time consuming. What's your alternative? Angry callers usually take a lot of your time anyway because you have to try to pacify them or come up with a solution that benefits both of you. However, until callers get the anger off their chest, they won't want to listen to rational solutions. The next time you confront a difficult caller, give it a try. Don't say anything until you hear silence on the other end. Then...

Indicate You Heard Them

A good listener is a rarity. Being a patient and effective listener helps pacify angry callers, but only if they feel you heard their grievance. So when they stop talking, start giving feedback to indicate you heard the key points. You don't have to agree, just summarize.

Be On Their Side

Even if the caller is wrong (those of you in customer service know this *never* happens!), empathize with him or her. Often callers don't expect you to solve their problem as much as they want you to listen to them.

Call the Person By Name

This sounds like a small point, but whenever possible, use the caller's name. This personalizes the conversation and makes it difficult for the caller to attack you.

Listen to Unspoken Messages

Along with hearing the verbal message, take time to listen to the hidden messages. All of us speak on two levels: the verbal and the non-verbal or emotional. Because we don't have the ability to see clues such as body language or facial expression, we must focus on the caller's voice, pacing of words and the overall tension level.

Respond Professionally

Remember to not take the anger personally-take it professionally. Recognize that callers may have legitimate concerns. They may be overreacting to the problem, but don't let that cloud your ability to assess the problem and its solution. Here are responses that can help you deal with hostile callers:

"We apologize for that oversight, Mr. Jones." (Only apologize when you or your company is at fault)

"We regret that inclement weather forces us to cancel the transportation." (Express regret when something happened over which you or your company had no control)

"Thank you for bringing this to our attention. It's customers like you who help us improve our service."

Out of Sight, Out of Mind

Probably the most difficult thing to learn is that it is extremely unhealthy to let an angry caller ruin your day. This produces a negative effect:

- It makes it more difficult to deal enthusiastically with subsequent callers
- It affects your overall attitude toward your job
- It reduces your efficiency because you focus on healing your emotional wounds rather than your job

Telephones have a magical quality. By disconnecting yourself from the angry caller. (Don't literally hang up on these people though!) The anger and hostility becomes history. When callers say "good-bye," the call is over. You can move on to the next call and hope for a more pleasant conversation.

SEVEN PRACTICAL STEPS TO CUSTOMER PROBLEM SOLVING

Use the following seven steps to calm a person and get a solution under way. This section will show you practical ways to put these steps to work for you. You can use them in order or pick the steps that relate the most to your situations.

Step 1. Express respect

(Example: "What you are telling me is important.")

Step 2. Listen to understand

(Example: "Tell me what happened.")

Step 3. Uncover the expectations

(Example: "Will you please tell me what you feel needs to be done?")

Step 4.

Repeat the specifics

(Example: "Let me make sure I understand what you are telling me.")

Step 5. Outline the solution or alternatives

(Example: "I will take this action." Or "You have several choices...")

Step 6. Take action and follow through

(Example: "Your trip has been marked. I will document your account so this information can added to all future trips.")

Step 7. Double check for satisfaction

(Example: "For accuracy, I am going to confirm all of your trip information.")

EXPRESS RESPECT

When people are irritated, it is usually caused by feeling that their worth has not been recognized.

When you are confronted with an irritated person, the best thing you can do is to quickly communicate respect. It is almost impossible for someone to be angry with you once you have expressed respect.

CALMING LANGUAGE

1. I will...
2. This is important to us.
3. This isn't the kind of service we want to give you.
4. I apologize.
5. Thank you for letting us know about this situation.
6. We want you to be pleased with our service.
7. Thank you for your patience.
8. Let me take some notes about what we have just discussed.
9. I will check into this right away.
10. I apologize for any inconvenience you encountered.

Which examples of calming language could you use? Pick those that fit your situation.

1. _____
2. _____
3. _____

BE A FANTASTIC FIXER

1. **Apologize**-It doesn't matter who's at fault. Customers want someone to acknowledge that a problem occurred and show concern over their disappointment.
2. **Listen and empathize**-Treat your customers in a way that shows you care about them as well as about their problem.
3. **Fix the problem quickly and fairly**-Bottom line, customers want what they expected to receive in the first place, and the sooner the better.
4. **Keep your promises**-When you say you are going to do something, be realistic about what you can and can't deliver.
5. **Follow up**-Don't assume you've fixed the problem. Check to be sure.



HOW TO HANDLE A LONG-WINDED CALLER

It is rare to find someone who will listen, and so it is not uncommon to monopolize people's time on the telephone. Idle chitchat sometimes provides us with a break from a hectic day, other times it helps loneliness.

In any case, when people call and use an unreasonable amount of time, they become "long-winded callers." The caller often doesn't realize how they inconvenience others. Their rambling explanations and casual chatter become deeply ingrained habits.

There are many different theories on how to deal with long-winded callers. Some telephone professionals believe that if you remain silent or give short one-word answers, long-winded callers will realize you don't have time for the conversation. In reality, most people interpret little or no response from a listener as an indication of interest. So if you don't respond, the caller will keep talking.

Ask Questions

Most long-winded callers don't know they are long-winded. Because they don't realize they take so much of your time and energy, you need to control the conversation in a way that lets them know you are interested in them and the subject. This still allows you to end the conversation at your discretion.

"Are you going to...?"

"Did you say your appointment is on...?"

These questions are designed to focus the caller's attention and response on the subject at hand.

Don't be afraid to interrupt long-winded callers with a question. They won't be offended as long as you appear interested in their response. Use their responses to move toward a conclusion.

Set the Course of the Conversation

If you initiate a call to a customer and the person you talk to is long-winded or has difficulty sticking to the subject, it is vital to establish the direction of the conversation at the beginning.

"Mr. Smith, I need to ask you three questions concerning your transportation...",

Use the PRC Technique

The PRC technique controls the conversation with three simple steps: Paraphrase, Reflect and Close.

PARAPHRASE: When the caller begins to talk in circles, you need to interrupt and say:

“I need to make sure I understand what you’ve said...”

This ensures that you both understand the key points and the caller is reassured that you heard him or her.

REFLECT: After you summarize the conversation, give callers a chance to respond or “reflect” what you’ve said. This allows them to agree or disagree and add anything you may have left out.

“John, what other appointments did you say you needed to set?”

CLOSE: Once callers appear satisfied, then you must “close” the conversation. Express appreciation for their patience and thank them for calling.

Budget Time to Listen

Often callers are long-winded because they are lonely and need someone to talk to. In this situation you can get stuck listening to stories about their weekend, kids who won’t talk to them, hospital stays and illnesses, and on and on.

How do you balance their need to talk with your talk time? Budget your listening time. When you talk to a customer, you have two conflicting desires: to create a positive image of your company and to get off the telephone in a reasonable time frame. You can achieve both by investing a specific amount of time listening. As the end of that time period approaches, give the caller feedback that indicates you’ve heard what he or she said, then conclude the conversation.

TECHNIQUES FOR ENDING PHONE CONVERSATIONS

When we talk to people face to face, there are natural times to end the conversation. On the telephone, however, we don't have the visual cues that play a major role in how we interact. It is sometimes a struggle to end a phone conversation; we're not sure how to end it without making the caller feel uncomfortable. Here are some tips:

Seek a Smooth Transition

Abruptly ending a telephone conversation leaves callers wondering what they said to cause your change in behavior. Plan ahead. Give yourself time to close a conversation gradually.

Don't Hesitate

Hesitation causes awkwardness on the telephone. If callers sense your hesitation, they may assume there is a problem.

- Paraphrase the conversation to assure callers you heard and understood what they said.
- Reflect on the caller's mood ("Mr. Kent, I have all the information needed for scheduling next weeks trips. Is all the information I have repeated accurate?")
- Close the conversation ("Mrs. Smith, I can begin scheduling the rest of your trips right away.")

Repeat Action Steps

It is critical to repeat action steps you agree upon so you both have a clear understanding of what steps are to be taken.

"I will have the transportation set up for Friday appointment. If I have any additional questions can I call you?"

Let the Caller Go

"Thanks for your time. I'll let you enjoy the rest of your day."

Let the Caller Hang Up First

This may sound small, but letting callers hang up first gives them a feeling of control over the conversation.

TACTFULLY TERMINATING THE NON STOP TALKER

From time to time you will get a caller on the line that goes into detail or drifts off the subject. There's the over-friendly type and the irate, non-stop talker who wants to be sure no detail of his/her complaint is left out. After you've listened and are reasonably assured you understand the situation.

Ask clarifying questions

This is especially useful with people who drift off the subject easily.

"Is there anything else that I can help you with?"

Summarize

When the customer pauses to catch his/her breath, step in with a summary statement that neatly wraps things up.

"So if I understand you correctly, Mr. Brown, you'd like to reschedule this appointment until next Friday. I will reset your transportation for that date."

Try the "eager-to-get-started" approach

"Let me get started on this right away and I'll call you if I need any additional information."

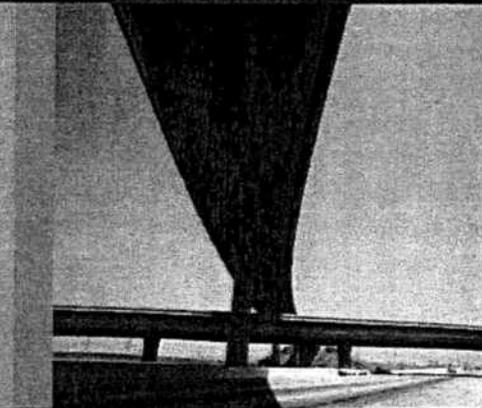
"Let me speak with my supervisor right away and give you a call back."



MTM

Medical Transportation
Management, Inc.

General Transportation Provider Education Plan



The enclosed information contains business practices, operations and other private information of MTM and is proprietary and highly confidential. This confidential information shall not be disclosed without the express written consent of MTM.

Provider Education Program

At Medical Transportation Management, Inc. (MTM) Provider Education occurs over the life of the contractual relationship. Provider Education is not just at one time. Nor is provider education always in formal group fashion. Obviously, at the start of the provider relationship and at the start of a new client program, the education is more frequent and more intense.

MTM's Provider Education occurs as follows:

Overview of Relationships

The Overview portion of education is performed by the Provider Recruiter. Education begins at the very start of the first call to prospective providers for a new geographic area. This is the case for Washington D.C. The provider recruiter uses the following educational guidelines when making their calls and moving a provider to the contracted phase. This educational process occurs on a one-on-one basis between a representative of the provider and MTM's Network Management Recruiter. Below are the guidelines for education that the Recruiter must accomplish.

- Overview of broker and provider relationship. Provider brochure that is sent to prospective provider is attached. Network Management Provider Recruiter must explain and instruct the provider regarding the following:
 - MTM manages the network but does not provide trips
 - MTM interacts with Clients and sells network to various clients
 - MTM handles all call intake from client and/or recipients
 - MTM handles determination of eligibility of recipient
 - MTM determines Level of Need (LON) along with guidelines from client
 - MTM determines appropriate mode of transportation
 - Provider to accept trips and schedule trips
- Provider Questionnaire mailed with introductory brochure (attached).
- Once Letter of Intent is signed, Recruiter to follow through with mailing of contract and guidelines (Provider Guidelines are attached). Recruiter to review important areas of guidelines with provider representative.
 - Criteria for qualifications of drivers (See Guidelines Section 2-5)
 - Insurance adequacy (Guidelines Section 7)
 - Vehicle worthiness (Guidelines Section 6)
 - After research about any specific City and/or State requirements, Recruiter to review with Provider (Guidelines Section 1)

- As Provider progresses through the contracting phase, the Provider Recruiter is responsible for educating the provider in general terms about the following processes. These processes will be readdressed by the liaison during site visits and in the group orientation process described later.
 - Trip offerings (Example of trip sheet attached)
 - Pick-up and delivery standards (Guidelines Sections 9-10)
 - Acceptance or rejection of trips (Guidelines Section 9)
 - Turnback rules (Guidelines Section 9)
 - Vendor and Member No-show rules (Guidelines Sections 10-12)
 - Signature requirements (Guidelines Section 10)

After this point of general education and overview of relationships, the provider has committed to a contractual relationship to become a network provider. After the provider has contracted with MTM, the provider is issued a Provider Handbook (Attached). At this point MTM can begin the orientation program for new providers. The orientation education is presented in two phases—on-site visit by an Area Liaison and Provider Group Orientation Meeting sponsored by MTM in the city or cities convenient to most of the newly contracted providers. You will note that the orientation material and education becomes increasingly more detailed. The group meetings will be more specific to items within the State/City and specific to the client(s) in the area.

Orientation Education

1.) Liaison On-Site Visit and Education

The external staff, Area Liaisons, are out in the field conducting on-site visits to assist in educating the providers and to ensure compliance to all MTM Guidelines. After a contract has been executed between MTM and a transportation provider, an initial on-site visit is conducted to review the MTM Transportation Services Agreement (contract) and Provider Guidelines. After the initial on-site visit, providers receive at least three face-to-face visits annually.

- **Initial Credentialing Site Visit:**
Transportation Providers are visited by MTM at their location prior to transporting for MTM. The MTM Area Liaisons inspect the Transportation Provider's operations and vehicles and provide initial orientation and guidance to the Transportation Provider regarding MTM's policies and Transportation Provider Guidelines. Using the checklist below, the Area liaison reviews many of the forms and policies in specific detail. The following items are discussed and reviewed:
 - **Business Documents**
 - Current Liability Insurance Policy (covered in MTM Guidelines Section 7 and sample E-3 in Provider Handbook)
 - Current and valid Business License (where required)
 - Other required permits, licenses, and certificates
 - **Written Policies**
 - Driver Orientation Policy and Procedure (sample in Provider Handbook, S-3)
 - Driver Training Policy and Procedure (sample in Provider Handbook, S-4)
 - Driver Performance and Evaluation Policy and Procedure (sample in Provider Handbook, S-5)
 - Annual In-Service Driver Training Policy and Procedure (sample in Provider Handbook, S-6)
 - Accident Investigation Policy and Procedure (sample in Provider Handbook, S-7)
 - **Reports and Forms**
 - Accident Report (sample in Provider Handbook, S-9)
 - Daily Pre-Trip Inspection (sample in Provider Handbook, S-10)
 - Driver's Daily Log (sample in Provider Handbook, S-11)
 - Driver's Emergency Procedure (sample in Provider Handbook, S-12)
 - Drug Free Workplace Policy (sample in Provider Handbook, S-8)
 - Complaints/Compliments/Incident Report Form (sample in Provider Handbook, S-13)
 - **Driver/Attendant Files (covered in MTM Guidelines Section 5 and Addition/Deletion form sample in Provider Handbook, S-1)**

- Driver Responsibilities and Conduct (covered in MTM Guidelines Sections 1, 2 & 3)
- Pick-up and delivery standards (covered in MTM Guidelines Sections 8, 9 & 10)
- Adding Vehicles (see Provider Handbook, S-2)

2.) Provider Group Orientation Meeting

The purpose of the Provider Group Orientation Meeting is to review the more important operating policies, processes and reports with the total group of transportation providers for an area so that they can meet the MTM representatives and MTM can present a consistent review for all providers to hear the same thing. A typical agenda for the Provider Group Orientation is as follows:

Agenda

Provider Group Orientation

- Review of Pick-Up Rules
- Review Turn-back Rules
- Review Member and Vendor No-Show Rules (where and when to call or e-mail)
- Review Trip Signatures, Reconciliations and Payments
- Review Annual Education and Credentialing Requirements for Drivers
- Review Accident and Incident Reporting
- HIPAA Compliance (Attached Handout)
- Handling Patients (adults and children) with Special Needs and Disabilities (Attached Handouts)
- List of Important Things to Remember (Attached Handout)
- Review of Any Client-Specific Requirements.

These sessions will typically take two to three hours and are followed by a question and answer period. MTM Representatives stay until all participants' questions are answered. If any questions require follow up, the Provider Representative is responsible for researching the answers and drafting a response to the participants of the meeting. The response will be sent by the Manager or Director of Network Management.

Ongoing Education

- Provider Representatives (Reps):

Reps are assigned to each geographic area and the providers in that area. The Reps are the providers' contacts for all day-to-day issues. Reps are constantly in a problem-solving, education-providing mode. As providers have questions or need assistance, they know their rep is the person to call and know that he/she will research the issues and get back to them with answers. If contracts change or providers change, the reps handle the contractual amendments. As policies or procedures change, the reps are in contact with their providers to make sure they are educated on the changes. The Director or Manager will always send an educational memo to all providers, but the reps are really the individuals that assure the education is complete.
- Annual/Re-Credentialing Site Visit:
 - Transportation Providers are visited by MTM at their location at least annually to do a full inspection of the Transportation Provider's operation (same items from Initial visit) and vehicles.
- Transportation Provider Relations Visit:

Transportation Providers are visited twice per year to review performance indicators, and to verify that driver and vehicle data is current. MTM Area Liaisons will also conduct follow up to verify correction of non-compliance issues. These visits may also be educational in nature when clarification or assistance is needed on various issues. The following items are discussed:

 - Driver/Attendant Files
 - Network Management maintains a database which stores all driver/attendant background check information. An approved driver/attendant list is reviewed with the provider to ensure no unapproved drivers/attendants are being utilized
 - Vehicle List
 - Network Management maintains a database which stores all vehicle information. An approved vehicle list is reviewed with the provider to ensure no unapproved vehicles are being utilized
- Special Site Visit:

MTM Area Liaisons visit the transportation provider's location to discuss any problems or concerns, and audit their operation for compliance with MTM's requirements. These visits may also be educational in nature when clarification or assistance is needed on various issues.

- Annual Provider Meeting:

Every year, the Manager or Director, the rep and the area liaison will hold a provider meeting in each geographic area. A typical agenda for this annual provider meeting may be as follows (Agendas would vary depending on the issues specific to that area):

Agenda
Annual Provider Meeting

- Turn-back issues
- Complaint Log and 48-hour response
- New Electronic Down Load Program
- New Quality Management Procedure
- Quarterly Provider Performance Reports
- Provider No-shows
- New and Lost business in Area

As a result of the ongoing duties of the Reps and Area Liaisons and their part in education, the faxing of educational notes to providers for issues of common concern and interest to all providers, and the sponsorship of annual provider meetings, MTM has created a comprehensive ongoing provider education program.

SAMPLE TRIP SHEET

CONFIDENTIAL – This FAX contains patient identifiable information for the use by the FAX recipient listed below. Disclosure of this information is prohibited by State and Federal laws. If you have received this FAX in error, please notify the sender immediately at the number below. Thank you!

To: AAA CAB Date: Mon 2003-09-15
 From: MEDICAL TRANSPORTATION MGMT (NEMT) Voice: (000) 000-0000 Provider Hotline
 16 HAWK RIDGE DRIVE, LAKE ST LOUIS, MO 63367 FAX: (000) 000-0000 Turnback Fax

Member Name: Test Test Med #: 11111111
 Age: 56

Member Phone: (573) 555-2323 Alt Phone: (573) 555-4545

One Way Trip Price Appt. time and date
 Trip number ABC60456222-R-0002199-S1 MON 2003-10-06 0830AM Pass: 1 With Appt: 1
 Round Trip/ To Trip/ From Trip Trip Status Code Crutches/Walker/Cane
 Car Seats: 0 W/Chair: N C/W/C: Y Pregnant: N
 Needs Wheelchair Lift: Yes/No

P: TEST TEST (999) 999-9999 PU Time: _____
 100 LEXINGTON AVE ANYTOWN FL 23456 DO Time: _____
 D: MIAMI REHAB CLINIC (800) 555-5555 PU Time: _____
 500 S JEFFERSON ST ANYTOWN FL 23465 DO Time: _____

Record all
 Pick Up
 times and
 Drop Off
 times

Special Needs:
 Uses Walker/Needs Assistance

Miles: 9.48

No Show: ___ Yes ___ No

Drv: _____ Att: _____ Mbr: x _____

Driver Signature Attendant (if necessary) Member Signature

Drv: _____ Att: _____ Mbr: x _____

****Please Note: Drivers should sign each trip sheet as well as having the member sign each time the member is picked up (this includes the pick up to go to the appointment and the pick up from the appointment.) The driver should always fill out the time of pick up and the time of drop off for each trip. If you have any questions or concerns about a trip, call the Provider Hotline (listed as the "voice number") or your Provider Representative immediately. Always call the member the night before to confirm the member is still going and pick up time for each trip. Also note, if the member either cancels at the time of pick up or is not at the pick up point at the agreed upon time of pick up, please report this to the Provider Hotline immediately to avoid any problems or complaints.

SAMPLE DAILY FAX SUMMARY

CONFIDENTIAL – This FAX contains patient identifiable information for the use by the FAX recipient listed below. Disclosure of this information is prohibited by State and Federal laws. If you have received this FAX in error, please notify the sender immediately at the number below. Thank you!

Date: Mon 2003-09-15

To: AAA CAB

From: MEDICAL TRANSPORTATION MGMT (NEMT)

16 HAWK RIDGE DRIVE, LAKE ST LOUIS, MO 63367

Trip#	Member Name	Appointment	Fax Sent
ABC60456222	Test, Test	2003-10-06 8:30	2003-09-15 15:14
ABC60456223	Test, Test	2003-10-07 10:00	Fax Not Sent
ABC60456224	Test, Test	Cancel 2003-10-05 13:00	2003-09-15 9:00

*Trip on Multi – Trip Fax

Total as of 2003-09-15 3

MTM Example Trip Log Sheet

Date of Trip	<input type="text"/>	Recipient's Last Name	<input type="text"/>	Recipient's First Name	<input type="text"/>	Trip Number	<input type="text"/>	*Vehicle Type	<input type="text"/>		
Destination Name	<input type="text"/>	# Additional Passengers	<input type="text"/>	# Trip Legs (ie: a round trip = 2 legs)	<input type="text"/>	Member No Show?	<input type="text"/>	One Way Trip Cost	<input type="text"/>	Total Trip Cost	<input type="text"/>
Trip Status	<input type="text"/>	Driver's Name, Printed	<input type="text"/>	Driver's Signature	<input type="text"/>	Member Signature 1 (for each leg of the trip)		<input type="text"/>			
Attendant Name, Printed (if applicable)	<input type="text"/>	Attendant Signature (if applicable)	<input type="text"/>	<input type="text"/>							

Date of Trip	<input type="text"/>	Recipient's Last Name	<input type="text"/>	Recipient's First Name	<input type="text"/>	Trip Number	<input type="text"/>	*Vehicle Type	<input type="text"/>		
Destination Name	<input type="text"/>	# Additional Passengers	<input type="text"/>	# Trip Legs (ie: a round trip = 2 legs)	<input type="text"/>	Member No Show?	<input type="text"/>	One Way Trip Cost	<input type="text"/>	Total Trip Cost	<input type="text"/>
Trip Status	<input type="text"/>	Driver's Name, Printed	<input type="text"/>	Driver's Signature	<input type="text"/>	Member Signature 1 (for each leg of the trip)		<input type="text"/>			
Attendant Name, Printed (if applicable)	<input type="text"/>	Attendant Signature (if applicable)	<input type="text"/>	<input type="text"/>							

*Vehicle Types: Ambulance (A), Ambulatory (C), Parailift (P), Stretcher (S)

SAMPLE RECONCILIATION SHEET

AAA CAB
COMPANY

Date	Last Name	First Name	Trip Number	V/T	Destination	P/U Zip	Del Zip	A/P	R/T	No Show	One-Way	Total	Code	Comments
20031006	TEST	TEST	ABC60456222	C	MIAMI REHAB CLINIC	23456	23465	1	R			\$100.00	S1	

Fill in total trip cost, if member was transported if the trip was cancelled or there was failure to transport the member, please enter zero.

****Please note this sheet will be faxed, unless you request it to be emailed. If you would like your reconciliation sheet emailed, please contact us with the email address you wish to use.**

******Once the entire sheet has been filled out, please return to claims auditor.**



DO'S & DON'TS WHEN WORKING WITH CHILDREN WITH SPECIAL NEEDS

DO

- ✓ **BE COURTEOUS: CHILDREN HAVE A RIGHT TO BE RESPECTED.**
- ✓ **LISTEN TO CHILDREN**
- ✓ **GIVE ENCOURAGEMENT: CHILDREN NEED TO FEEL THAT GOOD BEHAVIOR IS EXPECTED AND POSSIBLE.**
- ✓ **CONSIDER SAFETY FIRST**
- ✓ **LOOK FOR POSITIVES: POINT THEM OUT.**
- ✓ **DISPLAY SENSITIVITY: WHILE YOU KNOW SOME THINGS, THERE IS A LOT YOU MAY NOT KNOW.**
- ✓ **REMAIN CALM ALWAYS**
- ✓ **REMAIN PROFESSIONAL ALWAYS: CHILDREN LEARN FROM EXAMPLE.**
- ✓ **REMEMBER....EVERY PROBLEM HAS A SOLUTION.**
- ✓ **ESTABLISH ALLIANCE WITH PARENT/GUARDIAN: CHILD WILL SEE YOU AND PARENT WORKING TOGETHER.**



DON'T

- ❖ **USE PROFANITY: AS ADULTS WE ARE EXAMPLES.**
- ❖ **PLAY LOUD MUSIC: LOUD MUSIC TENDS TO ESCALATE BEHAVIORS AND AROUSE CHILDREN.**
- ❖ **MAKE THREATS OR THREATENING COMMENTS**
- ❖ **TALK ON CELL PHONES WHILE DRIVING OR WHEN SUPERVISING CHILDREN**
- ❖ **USE GIFTS/REWARDS FOR GOOD BEHAVIOR: CHILDREN WILL RESPOND ONLY TO PREVIOUSLY EXPECTED REWARDS. USE VERBAL PRAISE.**
- ❖ **STORE RUNS: AVOID "FAVORITE" SYNDROME CHILDREN ANTICIPATE FROM ADULTS.**
- ❖ **DISCUSS CHILDREN'S ISSUES/PROBLEMS**
- ❖ **BE AFRAID TO ASK FOR HELP: HELP IS ONLY A CALL OR COLLABORATION AWAY.**



MTM

Medical Transportation
Management, Inc.

MATP DRIVER'S CODE OF CONDUCT

QUALITY SERVICE AND SAFETY

Conduct yourself as a professional driver and adhere to all transportation rules and driving laws; Strive to ensure the protection and safety of all passengers, including insuring all children are in seat belts and booster seats when required.

COMMUNICATION

Speak and behave honestly, with integrity and treat all passengers with dignity and respect. Serve as a responsive service provider, sensitive to the needs of your passengers.

HONESTY

Do not provide false or misleading information in response to a request for information that is made for official purposes in connection to an incident.

INTEGRITY

In all interactions; do not make improper use of information in order to gain, or seek to gain, a benefit or advantage of any passenger or of any other person.

RESPECT

Take reasonable steps to avoid, any conflict (real or apparent) in connection with children and adults. Act with courtesy, care and diligence in the course of employment.

CONFIDENTIALITY

Comply with all rules regarding maintaining appropriate confidentiality about the diagnosis and treatment and all other personal information of a passenger.

Comply with all lawful and reasonable direction given by someone in the MATP who has authority to give the direction. At all times behave in a way that upholds this Driver's Code of Conduct



HIPAA

HIPAA Health Insurance Portability and Accountability Act / PHI – Personal Health Information

Dos	Don'ts
<ul style="list-style-type: none">• Keep manifest information in a concealed location while in the vehicle and/or during business hours• Shred documents with PHI after use• Keep minimal amount of information in hard copy format• Leave minimal information necessary on voice mails and answering machines if needed regarding confirmation of trips• Always have a cover sheet with information that is confidential• Keep PHI off seats during transportation of passengers• Always lock access to computer with passwords and use privacy notices• Notify supervisor or manager if accidental disclosure has occurred so that it can be documented	<ul style="list-style-type: none">• Place documents with PHI in wastebaskets or open recycle bins• Share information contained in the transportation log with facilities• Leave documents with PHI on copiers and printers• Discuss PHI in hallways, break rooms, elevators or any common areas

Important Things to Remember

- Pre-Trip Phone Calls
 - Always make pre-trip phone call to verify pick up address, destination address, additional passengers and appointment time; then give them the approximate time the driver will arrive at their home. The passenger may cancel or give different information than what is on the trip sheet; in either case, call the provider hotline number located on the trip sheet.
- Member No Shows
 - If a member is a no show (canceled at door, not home or wasn't ready) call the provider hotline immediately.
- Passenger Signatures
 - The driver must obtain a passenger's signature on each leg of a trip. For example, if it is a round trip, two signatures are required.
- Driver Signatures
 - Drivers must sign their name on each trip.
- Adding Drivers/Attendants
 - MTM must approve all drivers/attendants prior to transporting any MTM passenger. All proper background check documentation must be submitted to your Network Management Provider Area Liaison. Trips performed by unapproved drivers will not be reimbursed.
- Driver/Attendant Re-Credentialing
 - Drivers and attendants are required to have the proper background check documentation renewed annually and submitted to your Network Management Provider Area Liaison.
- Trip Reconciliation
 - In order to reimburse you on time, you must reconcile in accordance with the MTM Guidelines.
- Complaint Resolutions
 - Because MTM is contractually required to submit all complaints and resolutions to its clients, you must respond to complaints within forty-eight (48) business hours. Failure to do so may lead to a temporary suspension from the MTM provider network.
- Complaints Against Passengers
 - If you have any issues or want to lodge a complaint against any passenger, don't hesitate to call the provider hotline or your Network Management Representative. Complaints lodged against passengers are submitted to MTM clients.
- Network Management Department
 - Network Management is here for you, so give your Representative or Provider Area Liaison a call.



MTM

Medical Transportation
Management, Inc.

MTM Attachment R

Sample Recipient Education Plan



Effective Management Resulting in Appropriate Utilization

June 2004

The enclosed information contains business practices, operation and other private information of MTM and is proprietary and highly confidential. This confidential information shall not be disclosed without the express written consent of MTM.

MTM Attachment R
1 of 20

Recipient Education Program

At Medical Transportation Management, Inc. (MTM) Recipient Education occurs over the life of the contractual relationship. Obviously, at the start of the contract the education is more frequent and more intense.

MTM's Recipient Education occurs as follows:

Introducing MTM

The first contact MTM has with a recipient is during the 90 day implementation period. MTM expects to receive a member listing by head of households. Based on this list MTM will then mail the Recipient Notification letter via the US Postal service. See Attachment XX for samples of previous Recipient Notification Letters. At the announcement of award MTM Client Service department begins working on our Recipient Letter. Our Recipient Notification letter is written at a 6th grade reading level and offered in alternative formats based on the needs of Washington DC. In this case most likely Spanish, XXX. This letter at a minimum contains the following:

- What/Who is MTM?
- How to contact MTM?
- What medical transportation services do we provide?
- How to schedule an appointment or ride?
- When should I call to schedule an appointment or ride?
- How far can I go or travel?
- Rule for mileage reimbursement.
- Rules for riding par transit vans and other vehicles.
- Pick-up and drop-off guidelines.
- Consumer Expectations
- Complaint and Appeals process.

It's important to understand at the same time introducing ourself to the recipient MTM Care Managers are introducing themselves to the local community. We do this so the agencies and medical providers are familiar with MTM if the recipient mentions us to them.

Education Meetings

In addition to the initial mailing of the recipient notification letters, MTM staff will be readily available to provide Educational In-services throughout the community where recipients can learn about the program first-hand and obtain answers to their questions. We notify the recipient of these meetings via local agencies, home mailings, and through our Customer Service Centers. Most often meetings are set up through behavioral health programs, dialysis centers, and other facilities where eligible consumers attend or receive treatment.

On-going Education to Recipients

MTM Customer Service Center performs on going education to recipients with every call. When a recipient calls to request a trip the CSR often will educate the member of services, whether it's a covered service, cancellation of a trip, proper advance notice to request a trip, etc... Any deviation from protocols will result in the CSR either educating the member on the rules or possibly denying a trip.

Possible Education Topics that may happen in the Call Center

- Review of Pick-Up Rules
- Review Recipient No-Show Rules
- Review Trip Signatures
- HIPAA Compliance
- Advance Notice Rules
- Covered/Not Covered Services
- Closest Medical Provider Rule
- Appropriate Mode
- Urgent Appointment

As a result of the ongoing duties of the Program Manager, Transportation Providers and the Customer Service Representative and their part in education, educational letters, and meetings, MTM has created a comprehensive ongoing recipient education program.

WELCOME TO THE MEDICAL ASSISTANCE TRANSPORTATION PROGRAM (MATP)

1

A. WHAT IS MATP?

- The Medical Assistance Transportation Program (MATP) is a transportation service available to Medical Assistance consumers in Philadelphia County. MATP is funded by the Pennsylvania Department of Public Welfare (DPW). In Philadelphia County, the MATP Program is run by Medical Transportation Management, Inc. (MTM).
- Our program offers transportation, SEPTA passes, and mileage reimbursement to help you get to medical care or services from a Medical Assistance provider when you are unable to secure a ride for these services through your own means or through other available modes of free transportation.
- We are required to provide you with the least expensive, most appropriate transportation service available that will meet your personal needs.
- You can use MATP services to go to medical appointments or to get to any service covered by Medical Assistance. That includes appointments with your:
 - Doctor
 - Dentist
 - Drug and Alcohol Treatment Clinics
 - Hospital for tests (such as lab work and x-rays)
 - Psychologist or Psychiatrist
 - Medical equipment suppliers
 - Pharmacy for prescriptions
 - Any other Medical Assistance provider

If you have a medical emergency, you should call 911.

You **CANNOT** use MATP:

- If you need emergency ambulance transportation
- For non-medical trips such as for grocery shopping or for social activities
- To obtain medical care that is not covered by Medical Assistance.

(If you need emergency ambulance transportation, you must call 911.)

B. HOW TO CONTACT MTM

To arrange for transportation, you may call MTM at **1-888-240-6588**. You must provide at least three (3) business days (Monday thru Friday) advance notice for non-urgent medical appointments.

Our regular office hours are **Monday through Friday from 6:00 a.m. to 8:00 p.m.** If you call us after hours for urgent transportation needs, someone will be available to help you. If you call after hours for non-urgent transportation, you will be asked to call back the next day during normal business hours.

WELCOME TO THE MEDICAL ASSISTANCE TRANSPORTATION PROGRAM (MATP)

2

C. WHAT MEDICAL TRANSPORTATION SERVICES DO WE PROVIDE?

Depending on where you are going, what your needs are, and the costs involved, we could provide you with transportation in one of the following ways:

- SEPTA -- we will provide you with a buss pass before your appointment
- Para-transit -- includes a shared van, lift-equipped van, taxi or other vehicle
- Mileage Reimbursement -- if you have a car available, or if you know someone who has a car that can take you to your medical appointment, we will provide mileage reimbursement if it is the least costly, most appropriate service available. We will reimburse you at the rate of \$0.31 cents per mile. We will also reimburse you for your parking expenses and tolls if you provide receipts showing how much you paid.

D. SCHEDULING A RIDE TO AN APPOINTMENT

If you need a ride to a medical appointment or service, you should call MTM as soon as possible. For regular appointments, you must call us at least three (3) business days, (Monday thru Friday) in advance to arrange a ride. You can call us up to two weeks before your appointment to arrange a ride.

During the time of the call, you will be asked for your ACCESS card number to make sure you are eligible for MATP services, and you will be asked a few questions about your need for transportation:

- The date and time of your appointment, where you need to go, and how long the appointment will last.
- Be sure to tell MTM about any special needs you may have like: if you use a wheelchair or walker; if you have any problem that would keep you from riding in a bus or van with other people; or if you need to have someone go with you to your appointments because you are unable to do so on your own.
- If you inform MTM that you are unable to ride the public transit system (SEPTA), please be prepared to give MTM your medical provider's fax number. MTM will need to confirm with your medical provider the medical reason preventing you from accessing SEPTA.

We will let you know what type of transportation we will provide:

- If you will be using SEPTA, we will mail you a pass or passes.
- If you will be receiving mileage reimbursement, we will mail you a form to complete after your trip.
- If a van or other vehicle will be coming to pick you up, we will give you an estimated pick-up time and the name of the transportation company. The transportation company will call you the night before your ride to provide an actual pick-up time.

WELCOME TO THE MEDICAL ASSISTANCE TRANSPORTATION PROGRAM (MATP)

- When you get a ride from MTM, you are expected to be ready during your scheduled pick-up time assigned and also be physically able to get to the curb to be picked up. If you have any disabilities or limitations that keep you from getting to the curb within 5 minutes of the arrival of the van, please tell MTM at the time of your call. They will arrange for door-to-door service if you have a medical need.
- If your appointment is rescheduled or cancelled, or if your schedule changes and you no longer need a ride, you must call MTM immediately. Please call **1-888-240-6588**.

E. HOW FAR CAN YOU GO WITH MATP?

We are responsible for providing or arranging your transportation to get you to the medical care you need.

If you are enrolled in a Medical Assistance MCO (Managed Care Organization) or HMO, we can provide or arrange transportation for you to any medical provider in your MCO or HMO region.

Your MCO or HMO region includes: Philadelphia, Bucks, Chester, Delaware and Montgomery counties. We will only take you to providers in your MCO or HMO network, or providers that are out-of-network to whom your MCO or HMO has referred you.

If you have questions regarding the transportation options available to you, please contact our office at **1-888-240-6588**.

F. RULES FOR RIDING SEPTA

If you are able to ride the SEPTA public transit system (bus) for your transportation needs, simply call MTM and inform them what days you will be traveling to medical appointments. They will send you a SEPTA pass for your travel needs.

If you do not receive your SEPTA bus pass within 2 days of your appointment, you need to call MTM at 1-888-240-6588 and tell the Customer Service Representative.

You must request transportation at least three (3) days before your appointment. If you have an urgent appointment, you may request transportation as soon as you know.

G. RULES FOR MILEAGE REIMBURSEMENT

If you will be receiving mileage reimbursement for a trip, you must tell us in advance by calling us at 1-888-240-6588. We will send you a form to fill out to tell us how far you traveled and whether you had any parking or toll costs.

You can turn in your reimbursement request right after a trip or you can wait until the end of the month.

WELCOME TO THE MEDICAL ASSISTANCE TRANSPORTATION PROGRAM (MATP)

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You must send us the reimbursement request by the 5th day of the next month after your trip. For example, if your trip was in September, you must mail your request by October 5. We will send you a check to reimburse your expenses within two (2) weeks.

If your reimbursement is not received by the 5th, your reimbursement will be sent during the next month.

Send your reimbursement request to:

MTM
Attn: Reimbursement Dept.
16 Hawk Ridge Drive
Lake Saint Louis, MO 63367

H. RULES FOR RIDING PARATRANSIT (VANS OR OTHER VEHICLES)

Pick-Up and Drop-Off Guidelines:

- If we do not meet the timelines guidelines and you are kept waiting for your ride, you should call us at 1-888-240-6588 to report the problem or to see if alternative arrangements can be made.
- Drivers must have a badge identifying them and your van must have the company name on it.
- If we will be transporting you using a shared ride or a taxi, when you call you will be told the approximate time you will be picked up.
- The transportation company will call you the night before your ride to give you the actual pick-up time. Please be ready ahead of time.
- MATP drivers are required to pick you up no sooner than 15 minutes before your scheduled pick-up time and no later than 15 minutes after your scheduled pick-up time.
- Our policy is to drop you off at your provider's office no more than 1 hour before your scheduled appointment, and to pick you up no later than 1 hour after your appointment is finished.

Door to Door Service and Curb to Curb Service:

- When you get a ride through MTM, you are expected to be ready during your scheduled pick-up time and get to the curb to be picked up.
- If you have any disabilities or limitations that keep you from getting to the curb, tell that to MTM at the time of your call. They will arrange for door-to-door service if you medically need it.

WELCOME TO THE MEDICAL ASSISTANCE TRANSPORTATION PROGRAM (MATP)

Signing the Log:

You will be asked by the driver to sign a log in order to track when you were picked up and dropped off for your appointment. If for any reason you would like to file a complaint against the transportation company or driver, please call 1-866-436-0457 and a Quality Service Coordinator will file a complaint on your behalf.

Escorts:

You may bring someone with you as an escort at no cost to you in the following situations:

- If you are under 14, you can be escorted by a parent or other relative/guardian
- If you cannot travel independently, or you need any assistance due to age, illness, physical or mental disability (*MTM may require verification from your medical provider*)
- If you do not speak English, you can bring someone with you to interpret

No-Show Sanction Policy:

- If you are not ready for transportation during your scheduled pick-up time, that is called a **NO-SHOW**.
- You will be suspended from MATP services for one (1) month, if you no-show for a MATP transportation appointment more than three (3) times during one month.
- You will be notified in writing if you no-show three (3) times in one month.
- Upon re-entry into the MATP program, if you no-show more than three (3) times during one (1) month, you will once again be suspended from the MATP program for one (1) month.
- If you know that you will not attend the medical appointment, you must inform MTM within 24 hours before your appointment or as soon as you know your schedule has changed so that it is not counted as a no-show.

Behavioral Issue Sanction Policy:

A behavioral issue is defined in the following way:

1. Minor behavioral issue – is an issue that creates discomfort or offends a driver or other MATP passenger(s). An example can be verbal abuse.
2. Severe behavioral issue – is an issue that may create physical harm to the driver or other MATP passenger(s). An example can be striking another individual, creating disruption in the vehicle that could result in an accident, etc.

For minor behavioral issues – for the first incident in one month you will be given a written warning and suspended from MATP service for three (3) days, for the second incident in one month you will be suspended from MATP service for one week, and for the third incident in one month you will be suspended from MATP service for one month.

For severe behavioral issue – depending on the nature of the issue, you may be immediately and permanently removed from MATP services.

WELCOME TO THE MEDICAL ASSISTANCE TRANSPORTATION PROGRAM (MATP)

I. Urgent Care Transportation

At some point, you may need transportation on short notice for an urgent medical care matter. Urgent care includes any situation where your medical provider has told you that you need to come to their office, or to obtain some other medical treatment or service, that same day or within the next 24 hours. We have a process for responding to any urgent care request and will make every effort to help you get to the medical care you need.

If you need transportation for an urgent care matter, you should call MATP immediately. Please have the doctor's fax number when you call, as we may need to verify with your medical provider that your appointment meets urgent transportation requirements. If a medical provider has an earlier opening for you and wants you to come earlier, this is not a medical reason for approving urgent transportation and your request may be denied.

J. CONSUMER EXPECTATIONS

The MATP program requires that Consumers adhere to certain basic principles:

1. As a consumer, you can expect a timely, safe ride in a clean vehicle with a courteous driver.
2. You must request transportation at least three days before your appointment. If you have an urgent appointment, you may request transportation as soon as you know of your need.
3. You must provide MTM all requested information to determine the appropriate mode of transportation for your specific medical needs. If you do not provide all requested information your transportation may be denied.
4. If you are riding in a van, you must be ready during the scheduled pick-up time.
 - If you are not ready, you will be marked a "no-show."
 - More than three (3) no-shows per month may result in you being temporarily suspended from the MATP program.
 - If you know that you will not attend the medical appointment, you must inform MTM 24 hours prior to your appointment or as soon as you know your schedule has changed.
5. If your ride does not come on time or not at all, you should call MTM at 1-888-240-6588 and tell the Customer Service Representative.

WELCOME TO THE MEDICAL ASSISTANCE TRANSPORTATION PROGRAM (MATP)

7

6. If your appointment is rescheduled or cancelled, or if things change and you no longer need a ride, you must call MTM immediately and let us know at 1-888-240-6588.
7. You must behave appropriately during your ride on the MATP vehicles. If you mistreat the driver or other passengers during your ride, you may be temporarily suspended from the MATP program.
8. If you are not completely satisfied with your ride, you can call MTM and file a complaint at 1-888-240-6588.

K. COMPLAINT PROCESS

- A complaint is any issue, dispute or objection you express to us about our agency, or about the coverage, operations or policies of the MATP.
- If you have a complaint about our services, about how you were treated by our staff or a driver, or about our policies and procedures, we encourage you to let us know.
- We will record your complaint, investigate it and respond to you within two (2) days.
- To file a complaint about MTM's services, you may call 1-866-436-0457 and a Quality Service Coordinator will file a complaint on your behalf.

L. APPEAL PROCESS

- We are required to give you a written notice if we deny your request for MATP transportation or for mileage reimbursement.
- We are also required to give you written notice in advance if we plan to reduce or change your services or suspend you from the program for any length of time.
- The notice will tell you the reasons for our action, when the action will go into effect, and your rights to appeal the decision.
- You can get free legal assistance if you need help with an appeal. For assistance in this area, please call the Pennsylvania Health Law Project Helpline at 1-800-274-3258.
- You can also call the CLS, Community Legal Service Welfare Law Line at 215-227-6485.

M. OTHER MEDICAL TRANSPORTATION RESOURCES

If we are not able to meet your medical transportation needs, you will be referred to your caseworker at the local County Assistance Office (CAO).

If you need information about getting a ride at no cost to your medical appointments or if you need help reading this brochure, call MTM at 1-888-240-6588.

Si necesitas información sobre transporte gratis a tus citas medicas o si necesitas ayuda leyendo esta carta, llama a MTM al numero gratuito 1-888-240-6588.

Если Вы нуждаетесь в информации о получении поездки бесплатно к вашим медицинским назначениям или если Вы нуждаетесь в помощи, читая эту брошюру, назовите(вызовите) MTM в 1-888-240-6588.

如果你需要关于到你的医学约会免费地得到骑的信息或者如果你需要帮助阅读这本小册子，电话 MTM 对 1-888-240-6588.

Nếu bạn cần thông tin về việc di chuyển đến điểm hẹn gặp bác sĩ miễn phí hoặc nếu bạn cần trợ giúp để đọc cuốn sách nhỏ quảng cáo, hãy gọi tới số 1-888-240-6588.

ប្រសិនបើលោកអ្នកត្រូវការព័ត៌មានស្តីអំពីការទទួលបានដោយឥតគិតថ្លៃ ចំពោះការណាត់ជួបរបស់ពេទ្យ ឬ ប្រសិនបើលោកអ្នកត្រូវការជំនួយក្នុងការអានកូនសៀវភៅស្តីអំពីនេះ សូមទូរស័ព្ទទៅ MTM តាមរយៈលេខ :

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PRESORTED FIRST CLASS
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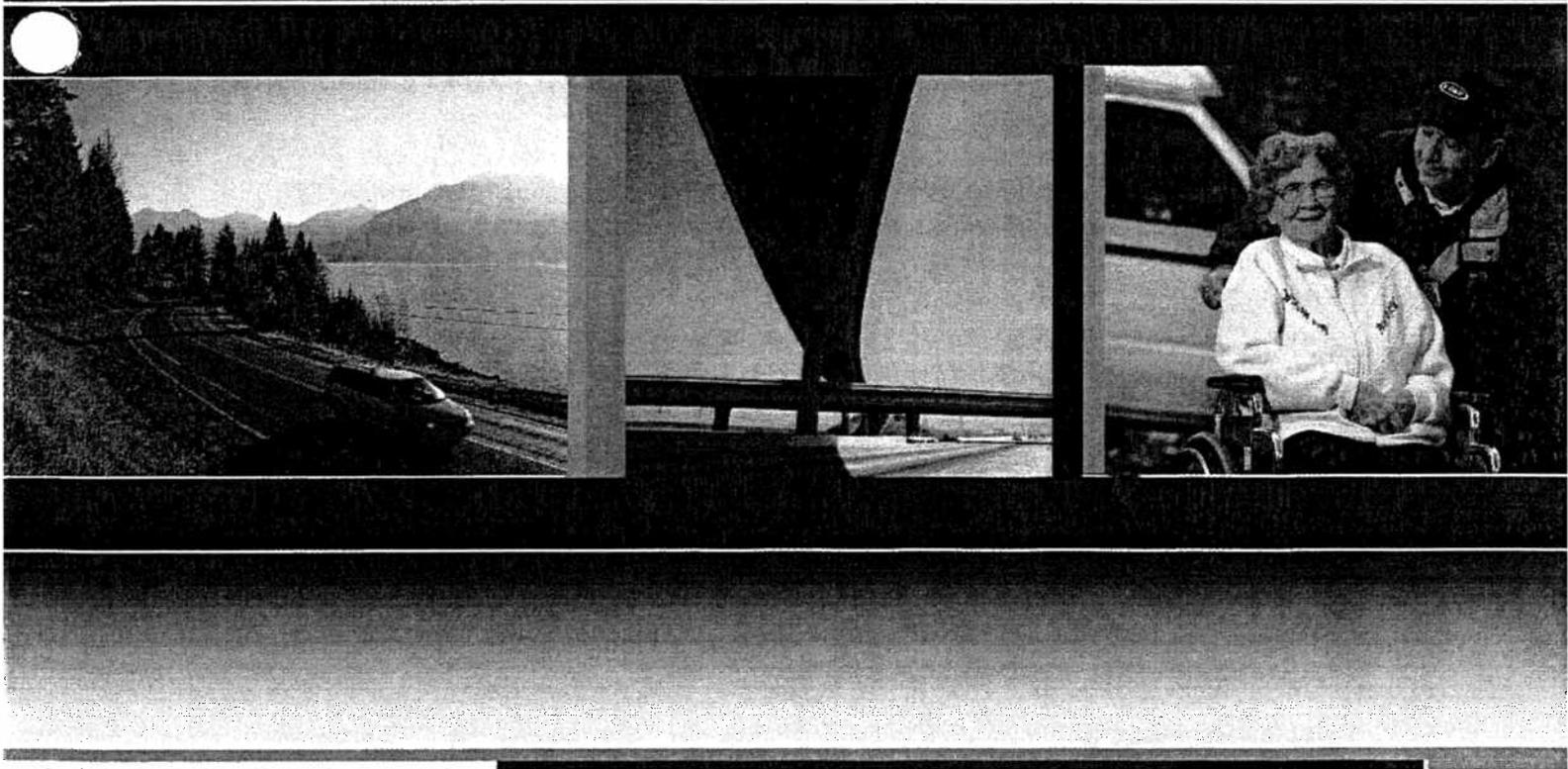
16 Hawk Ridge Drive - Lake
Saint Louis, MO 63367
Medical Transportation
Management, Inc.
MTM 



MTM

Medical Transportation
Management, Inc.

General Staffing Education Plan



The enclosed information contains business practices, operations and other private information of MTM and is proprietary and highly confidential. This confidential information shall not be disclosed without the express written consent of MTM.

Staff Training and Education Program

At Medical Transportation Management, Inc. (MTM) staff training is customized by department. MTM is diligent in our efforts to keep staff apprised of requirements for employment. MTM is an equal opportunity employer that solicits potential employees without discrimination. MTM makes every attempt to ensure our staff is comprised of the various cultures and ethnicities consistent with the populations we serve.

Introducing MTM

Upon hire all employees attend a general overview training lead by our Human Resources Department. Each employee is given an MTM Employee handbook that covers all policies and procedures for MTM. Below is the Table of Contents for the Employee handbook. :

We have included sample presentation of these trainings for your reference. See Appendix A to this staffing education plan..

90 Day Introductory Period

All employees are subject to a 90 day "probationary" period. It is during this time that the employee will be trained on their specific department responsibilities. If the department manager feels the employee is not able to perform his/her duties during the "probationary period" the manager has the right to dismiss the employee or if the employee was promoted from another department the employee will be sent back to his/her original department.

As stated above all departments within MTM have specific policies and procedures. These materials are confidential and trade secret to our internal processes.

HIPAA Training

Annually, MTM employees receive HIPAA training. The training is provided by the Manager of the Quality Management Department and pursues several goals:

- To provides the MTM staff with the basic information necessary to ensure that our client's health information is regarded with the highest privacy.
- To provide MTM staff with the basic information necessary to meet the standards set forth by the governing agencies.
- To focus on the daily functions of the staff in regards to ensuring clients privacy

We have included sample presentation of these trainings for your reference. See Appendix B to this staffing education plan..

Fraud Alert Training

In relation to services provided by MTM; Fraud encompasses a wide range of recipient and transportation provider issues. For that reason the QM department provides regular

training to all MTM staff to identify fraud alerts. The training is provided by the Supervisor of the Quality Management Department.

We have included sample presentation of these trainings for your reference. See Appendix C to this staffing education plan..

Update Training

MTM Policies Changes- MTM provides periodic training on changes/updates to corporate policies and procedures. This training can occur via staff meetings, e-mails. Each employee is provided a copy of the policy to include in their copy of the employee handbook. Employees are required to sign an acknowledge stating they have read and understand the policy.

Changes in Client Protocols– All departments that are affected by changes in a client protocols or requirements will be trained immediately upon implementation of the change. These changes will be presented in Client Protocols and each employee will be trained on the changes by the appropriate Program/Account Manager. See Attachment X for CSR Training Manual Updates.

Additional Training

MTM's Recruitment Specialist conducts ad hoc training to all staff. In the past year MTM has held training on the following:

- Excelling as A first time supervisor
- How to Avoid Hiring the Wrong Person
- Dealing w/ Difficult Employees
- 20 Things Supervisors Need to Know
- How to Conduct Effective Performance Appraisals

We have included sample descriptions of these trainings for your reference. See Appendix D to this staffing education plan..

Appendix A

Employee Handbook TOC

EMPLOYEE MANUAL/PERSONNEL POLICIES

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Appendix B

HIPAA Training

Health Insurance Portability and Accountability Act

Dr. Grecia Ibarra, MD, MA

Manager

MTM Quality Management

Introduction

This presentation is to

- Provide the MTM staff with the basic information necessary to ensure that our clients health information is regarded with the highest privacy.
- Provide MTM staff with the basic information necessary to meet the standards set forth by the governing agencies.
- Focus on the daily functions of the staff in regards to ensuring clients privacy.

Overview of HIPAA Act of 1996.

- The Health Portability and Accountability Act of 1996, has two major components.

- Title 1 of the HIPAA Act address the Health Insurance Reform.
- Title 2 of the HIPAA Act address to the electronic healthcare transactions and the privacy and security of health data.



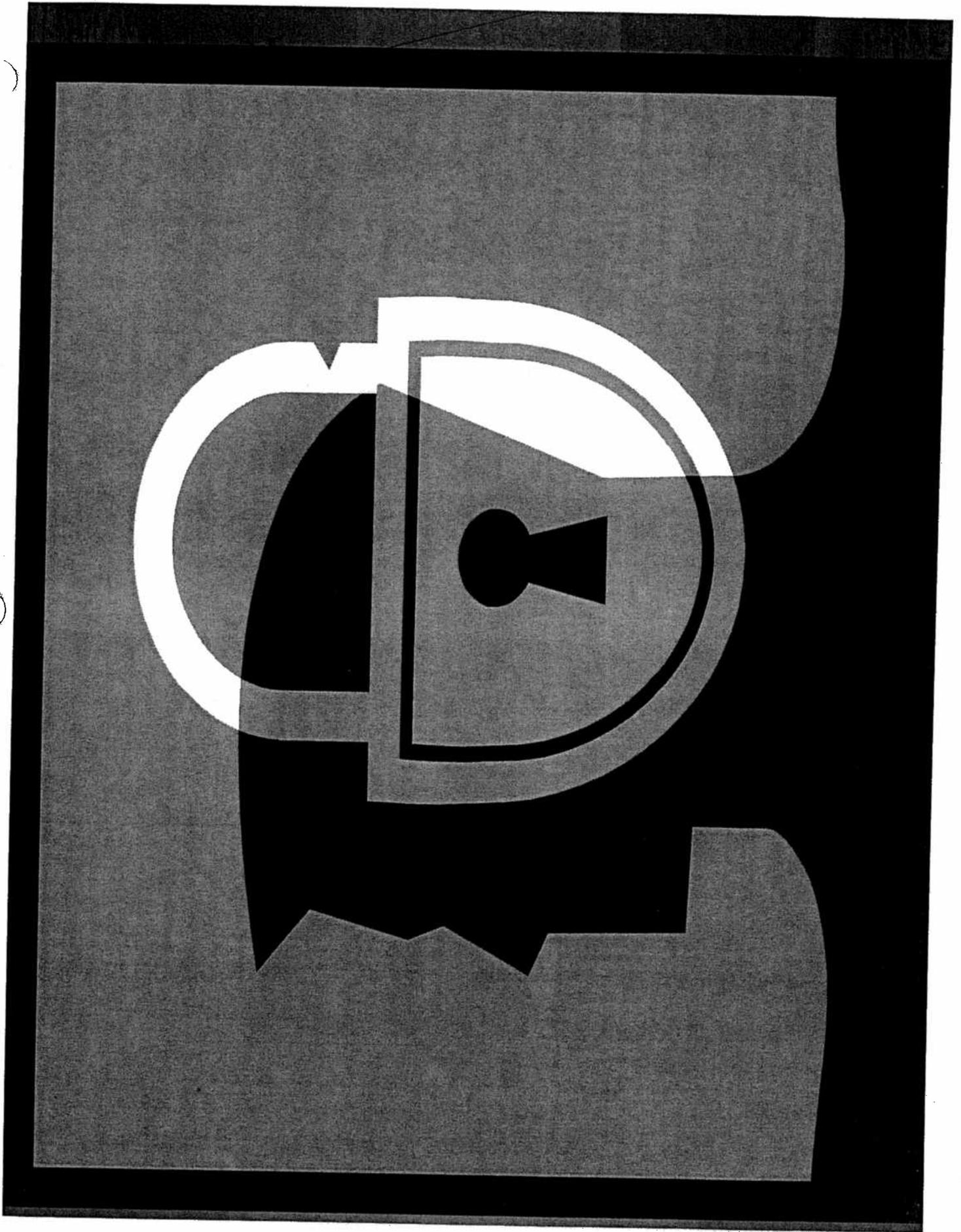
Health Insurance Reform

- Title I protects health insurance coverage for workers and their families when they change or lose their jobs (COBRA).



Administrative Simplification

- Title II of the HIPAA Act establish
 - National standards for electronic health care transactions.
 - It also addresses the security and privacy of health data.



GOVERNING AGENCIES

- The Department of Health and Human Services (HHS) has given **The Centers for Medicare and Medicaid Services (CMS)**

the responsibility for enforcing the *electronic transactions and security standards*.

CMS will also enforce the Title I of HIPAA.

GOVERNING AGENCIES

- The **Office for Civil Rights** in HHS will enforce the *privacy standards* (Title II).

SANCTIONS

- Exclusion from Medicare program
- Civil monetary penalties for certain wrongful disclosure of individually identifiable health information... Was intentional or unintentional?
- Penalties related to not meeting contractual obligations.

GLOSSARY OF TERMS RELATED TO HIPAA

- **BUSINESS ASSOCIATES-** is a person or entity that performs certain functions or activities that involve the use or disclosure of protected health information on behalf of, or provides services to a covered entity. MTM is a Business Associate.
- **PROTECTED HEALTH INFORMATION:** Means individually identifiable health information
- **MINIMUM NECESSARY INFORMATION-current practice** that protected health information (PHI) should not be used or disclosed when it is not necessary to satisfy a particular purpose or carry out a function.

PURPOSE OF SHARING PHI

For "TPO"

- **Treatment:** management of health care and related services that includes coordination among health care providers.
- **Payment:** various activities of health care providers to obtain payment or be reimbursed for their services and
- **Healthcare Operations:** certain administrative, financial, legal, and quality improvement activities of a covered entity that are necessary to run its business and to support the core functions of Treatment and Payment.

MAINTAINING PRIVACY

- WRITTEN
 - Keep information in a folder during business hours and lock drawers after hours.
 - Shred documents with PHI after use.
 - Keep minimal amount of information in hard copy format.

MAINTAINING PRIVACY

■ TELEPHONE

- Leave the minimal information necessary on voice mails and answering machines regarding confirmation of trips. If in doubt, have the member call the Customer Service Center or employee to confirm.
- Give only the necessary information to transportation providers to complete a trip.
- When requesting health information from a health care provider, give reason for information needed and how it will be used.

MAINTAINING PRIVACY

- FAXES
 - Should always have a cover sheet with information that it is a confidential document, and a contact person if it was sent in error.
 - Send faxes with cover letter that spells the HIPAA language

MAINTAINING PRIVACY

■ WORKSTATION AND COMMON AREAS

- Always lock access to computer with passwords and use privacy notice.
- Remove PHI from desk and place in a locked drawer at end of the work day.
- Keep PHI on desk in a folder or upside down during work hours.
- Remove documents with PHI from copiers and printers as soon as possible. None should be left at the end of the business day.

MAINTAINING PRIVACY

- Do not discuss PHI in hallways, break rooms, elevators or any common areas.
- No PHI should be placed in waste baskets or opened recycle bins.
- Notify supervisor or manager if accidental disclosure has occurred so that it can be documented.

SUMMARY

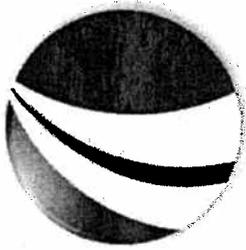
Everyone doing business with MTM has the responsibility to protect our clients and recipients personal health information.

Where to Get More Information

- Quality Management Department
- <http://www.hhs.gov/ocr/hipaa/>
- <http://www.hhs.gov/news/press/2002pres/hipaa.html>

Appendix C

Fraud Alert Training



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Fraud Prevention



Process for Identifying
&
Reporting Fraud Alerts

Fraud Defined:

- **Fraud** – A deception deliberately practiced in order to secure unfair or unlawful gain.



Fraud –

How does it relate to services provided by MTM?

In relation to services provided by MTM; Fraud encompasses a wide range of recipient and transportation provider issues. Offenses that should be considered fraud include:

- Misuse of medicaid services
- Misuse of transportation, bus, and mileage reimbursement services
- Improper billing practices





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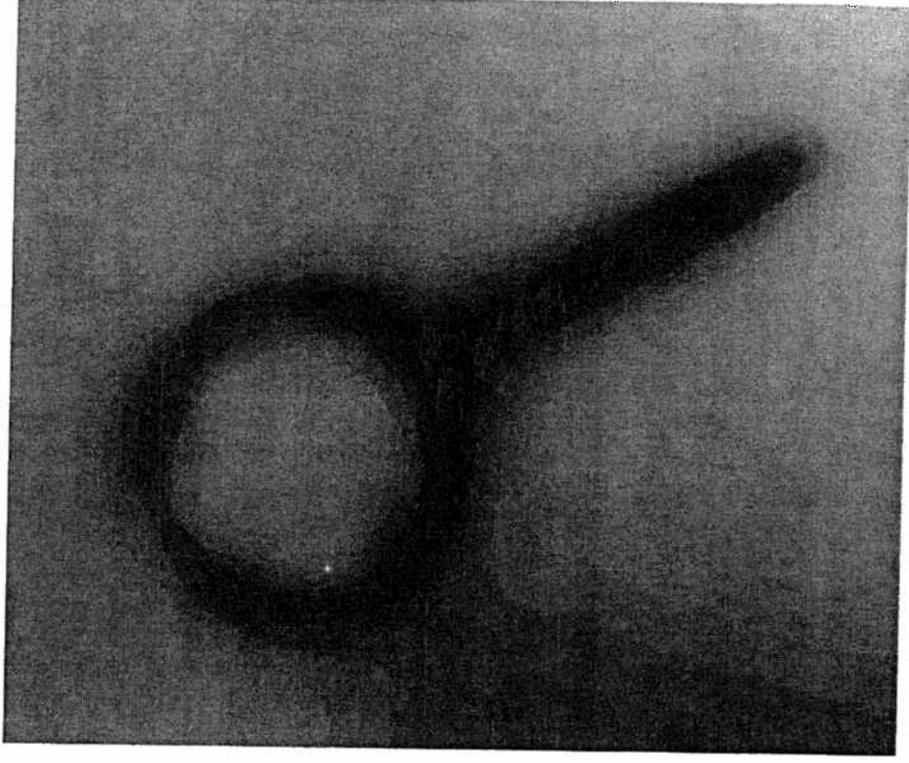
Fraud Program

Overview:



Purpose of the Fraud Program:

- The Fraud Program is set up to monitor and prevent cases of recipient and transportation provider fraud. Compliance Auditors review and investigate fraud alerts that are reported daily.



Process for Identifying & Reporting Fraud Alert Issues:

- Anytime an individual reports or suspects recipient or transportation provider fraud, a fraud alert code (FA) may be entered into the notes of a trip in the AS400, with supporting notes that explain the issue that needs further investigation.
- If at all possible; Immediate steps to prevent fraud from occurring should be taken. This includes:
 - Denying a seemingly fraudulent request for transportation
 - Adding notes to a member's Red Flag regarding the issue
 - Contacting a team lead or supervisor for assistance.

Denial Codes Commonly used in Addressing Fraud

- **DR-** Appointment not verified with the medical provider.
- **DA-** Not Medicaid Eligible.
- **DF-** Not Medicaid Covered Service.
- **DE-** Not Closest Provider.



Process for Identifying & Reporting Fraud

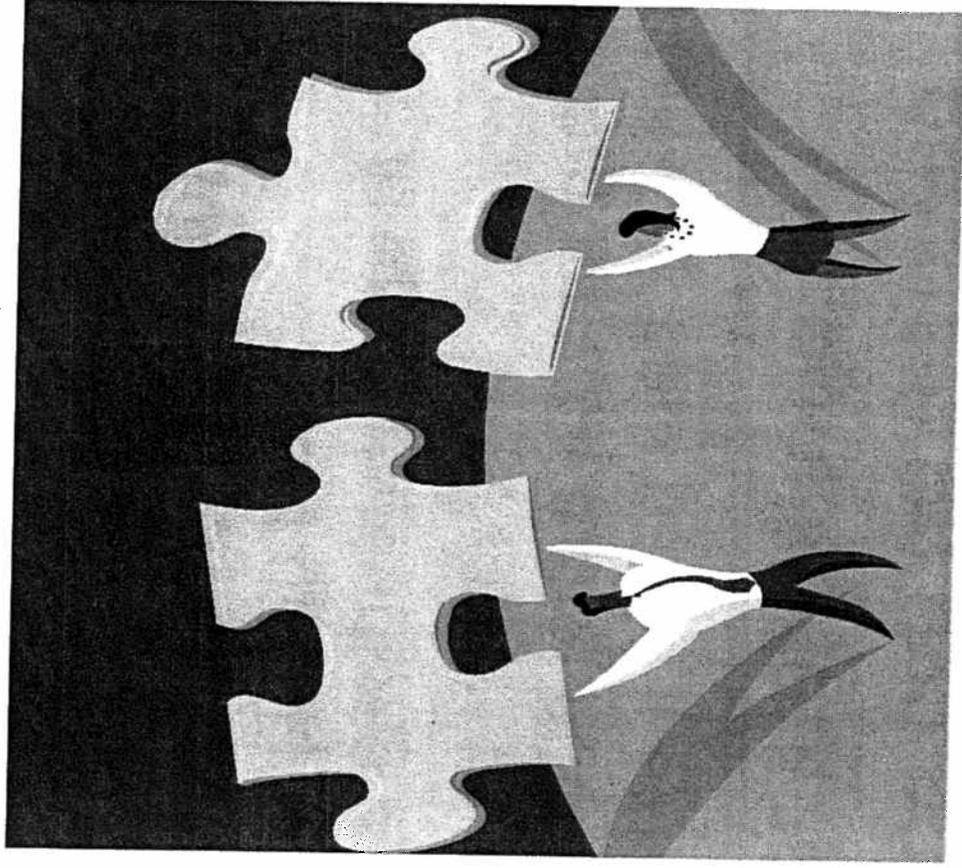
Alert Issues Continued:

- Each day the Compliance Auditor pulls a report of the previous day's fraud alerts that the system has automatically generated. The Compliance Auditor investigates each fraud alert and works towards resolving the issue.
- Each fraud alert is posted to a monthly Fraud Alert Summary that includes the issue, a resolution to the issue, and a code to identify the type of issue that has been reported. For example, if the issue has to do with misuse of a bus service, the issue is coded *BI* accordingly, so the issue can be identified as a bus issue.



Resolving Fraud Issues:

- Compliance Auditors work towards resolving each fraud alert issue reported. Resolutions to fraud alert investigations depend on the type of fraud alert that has been reported as well as the significance of the issue.



A recipient fraud issue can be resolved in several ways, that include:

- Adding a note to the recipient's Red Flag, to warn and instruct CSR's on setting future trips for the recipient.
- Reporting the issue to the designated State or County Medicaid office, or Health plan.
- Adding a recipient's name to a list of frequent abusers so that all of the recipient's trip request will be monitored and case managed in an effort to prevent future fraud.



Basic Do's and Don'ts for Scheduling Transportation

Do's-

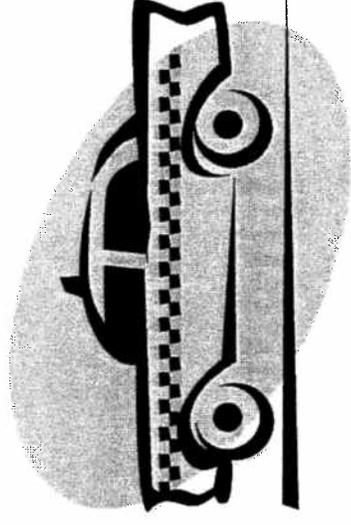
1. Review the trip notes of previously denied trips.
2. Verify the appointment with the medical provider, if there's any suspicion of fraud.
3. Use a clear tone, when speaking to callers.

Don'ts-

1. Do not disclose negative information contained in the trip notes or the Red Flag. Trip Notes are intended for internal use.
2. Do not use the speaker phone, while speaking to a member.
3. Do not mention the word Fraud or accuse a caller of fraud, ever.

Resolutions to transportation provider fraud issues include:

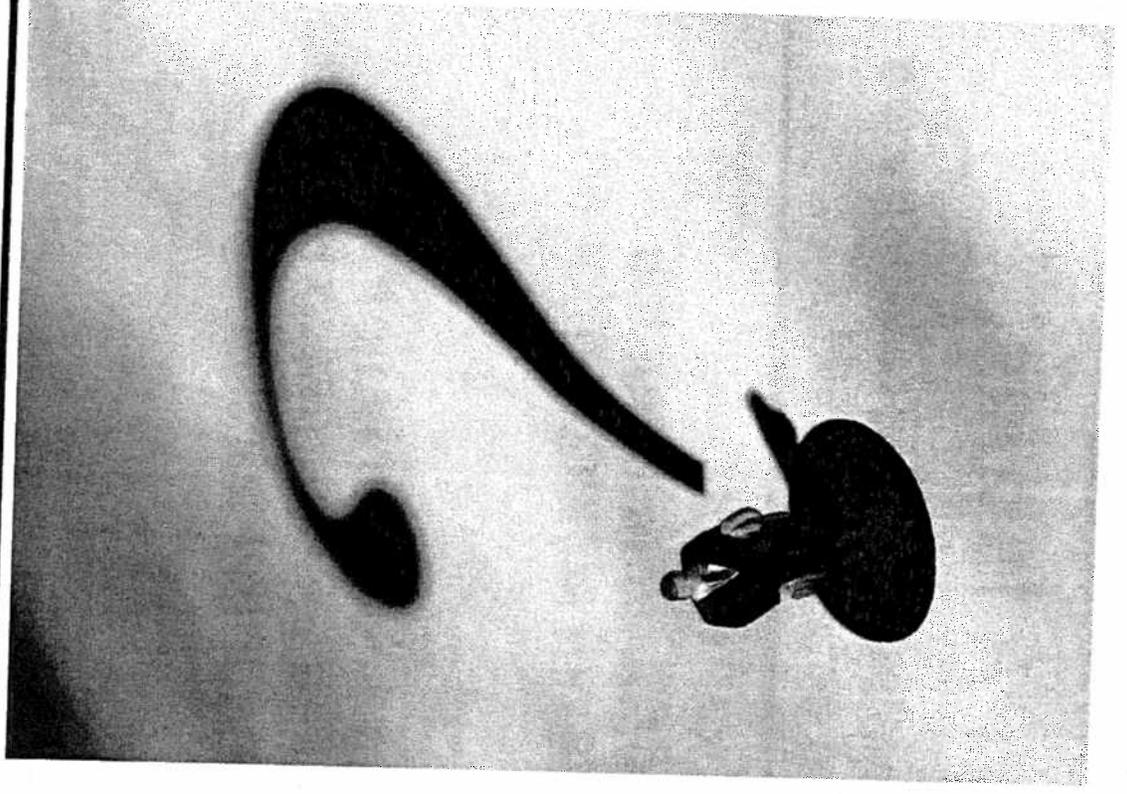
- Recovering trip cost
- Providing Transportation Provider Education
- Making a recommendation for an audit of the transportation provider's trip records.
- Establishing a Corrective Action Plan for the transportation provider to sign to acknowledge the problem that has occurred and identify corrective steps to prevent future fraud.



?

If You're Curious about the outcome of a reported Fraud Alert....

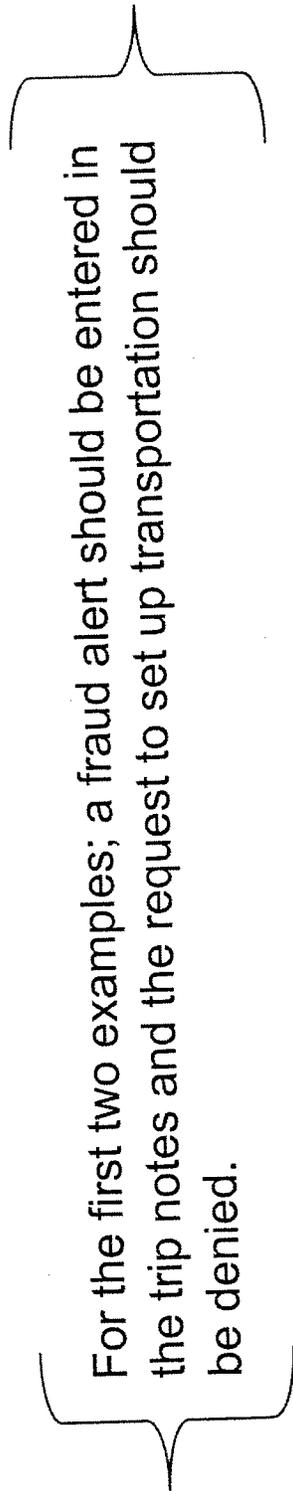
- Compliance Auditors document the resolution to each Fraud Alert in the AS400.
- If you ever wonder how an issue was addressed or resolved, you can review the trip notes a few days after the FA has been reported.
- The trip note code used to identify fraud alert resolution notes is XQ.



10 Examples of Valid FA Issues:

*Fraud Alert issues are not limited to the examples described below. There's a wide range of issues that should be reported as potential fraud.

1. A member states they have an appointment, but the doctor's office states the person is not scheduled for an appointment.
2. A member has been informed that a service is not covered, but the member still makes an attempt to be transported to a facility to be seen for the service that is not covered.



For the first two examples; a fraud alert should be entered in the trip notes and the request to set up transportation should be denied.

Examples Continued:

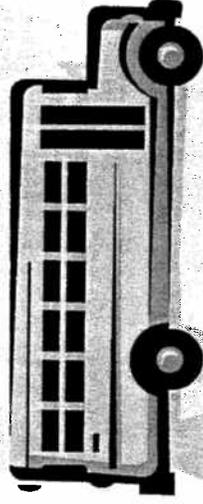
3. Two members from the same household have set up mileage reimbursement for appointments that are on the same dates and to the same destination.
4. A member states they have a working vehicle but request transportation service rather than mileage reimbursement without a medical reason for not driving.
5. A transportation provider reports that a recipient left the drop off location, at the time of drop off to an appointment.

Examples Continued:

6. MTM staff is informed that a transportation provider did not complete a past trip, but the trip still has a scheduled trip status.
7. A request has been made to set up transportation under the name of a member for someone other than the member.
8. A member's trip history reflects excessive trips to the Emergency Room or excessive routine appointments without a justified reason that warrants the excessive trips.

Examples Continued:

9. A recipient claims to have an appointment and request transportation to a facility that is not open on the date of the trip.
10. A member reports that a driver has arrived in an ambulatory vehicle for a Para lift trip.



Recap of Steps involved in Identifying & Reporting Fraud Alert Issues:

Step 1:

Report issue of suspected fraud by entering an FA code in the trip notes.

Step 2:

Take immediate steps to prevent fraud or abuse from occurring, if at all possible. (i.e. deny/cancel trip request that involves fraudulent or abusive trip activity, contact team lead, Red Flag the member.)

Step 3:

A Compliance Auditor will review the FA, Resolve the FA issue, and Identify the FA type.

For Questions...

* Initially, contact your team lead or supervisor with questions regarding

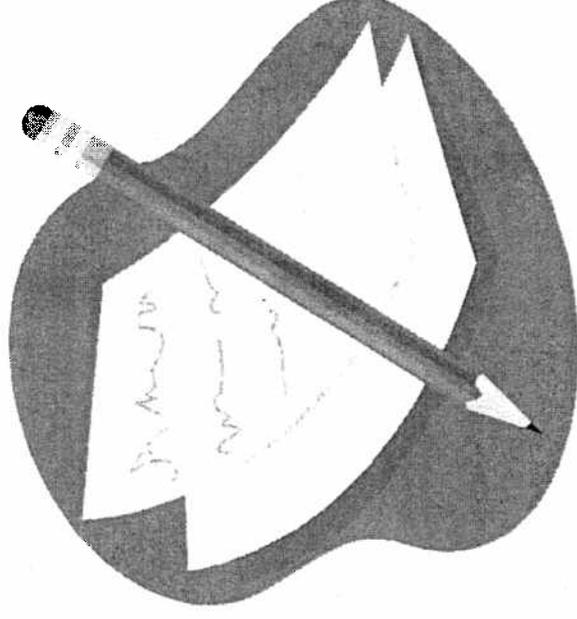
Fraud.

** For further assistance, contact:

Kellie Tucker, QM
Supervisor at

ktucker@mtm-inc.net or
call

(636) 561-5686 x 5563



Appendix D
Sample Management
Series Training

Management Training Series examples

"20 Crucial Things Your Supervisors Must Know about Workplace Law", and for your convenience will be offered through CD. **This training is mandatory and is required for all team lead positions and above.**

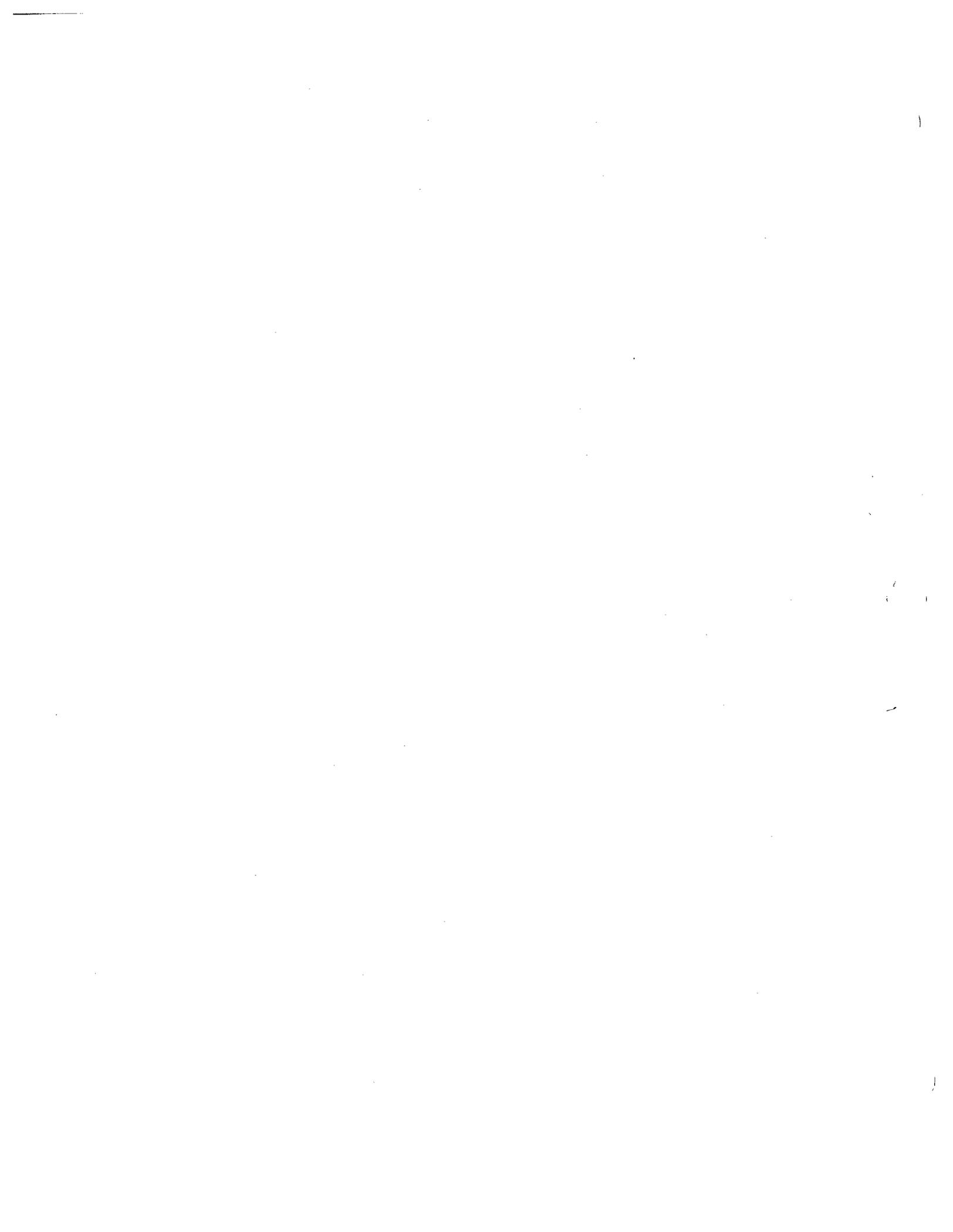
- What supervisors must NEVER say, write, or do when participating in the hiring process.
- The 3 key things supervisors must know about performance evaluations, to ensure they aren't breaking the law.
- What federal law says about how you must handle problem employees.
- Why a termination is the action most likely to result in a workplace lawsuit-and how to avoid that.
- Whistleblowing: the 2 most critical things your supervisors need to know.
- Why banter or jokes based on race, sex, religion, national origin, age, and disability can result in devastating charges.
- How to handle verbal threats in the workplace-both when the employee who makes the threat has a "disability" and when the person is not an employee.
- Exactly what to do when an employee asks for leave under the Family and Medical Leave Act.
- Why supervisors MUST document-and how to get them to do it.

"How to Conduct Effective Performance Appraisals" This seminar will be presented by myself and will cover some of the following material:

- The importance and benefits of performance appraisals.
- Avoiding discrimination in performance appraisals
- Measuring and documenting performance
- Setting performance goals
- Preparing for and conducting appraisal interviews
- and much more

"Excelling as a First Time Supervisor" This seminar will be presented by myself and will cover some of the following material:

- Actions you can take that will establish your authority, boost your credibility, and earn respect.
- Techniques on how leaders gain the commitment and cooperation of workers
- How to manage up the ladder-- tips for communicating with your boss and other executives
- How to conduct a fair and constructive performance evaluation





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MTM Attachment R

MTM Systems User Manual



Effective Management Resulting in Appropriate Utilization

June 2004

The enclosed information contains business practices, operation and other private information of MTM and is proprietary and highly confidential. This confidential information shall not be disclosed without the express written consent of MTM.

MTM Attachment R
1 of 20

i. Document History

ii. Referenced Documents

1. Introduction

1.1. Purpose

1.2. Scope

1.3. Assumptions

1.4. Constraints

1.5. Definitions and Terminology

2. Business Processes and Rules

2.1. Call Intake

2.2. Care Management

2.3. Network Management

2.4. Quality Control

2.5. Accounting

2.6. Business Analysis

3. System Modules

3.1. Trip Reservation

3.2. Eligibility Management

3.3. Transportation Provider Assignment

3.4. Transportation Mode Certification

3.5. Program Assignment

3.6. Frequent Flyer Management

3.7. *Recurring Trip Management*

3.8. *Data Management*

3.9. *Interactive Voice Response*

3.10. *Invoice Processing*

3.11. *Complaint Management*

3.12. *Member Management*

3.13. *Routing and Schedule Management*

3.14. *Transportation Provider Management*

3.15. *Mileage Rate Management*

3.16. *Reporting*

3.17. *Electronic Trip Download*

3.18. *File Processing*

4. *Cross Reference Business Process and System Modules*

5. *System Architecture*

5.1. *Topology*

5.2. *System Specification*

5.3. *3rd party Software*

5.4. *Proprietary Algorithms*

5.5. *Growth Requirements*

5.6. *Budget and Bandwidth Quotas*

5.7. *System Test Features*



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MTM Attachment R

Customer Service Professionalism



Effective Management Resulting in Appropriate Utilization

June 2004

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MTM Attachment R
1 of 20

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ANSWERING THE TELEPHONE

BE PREPARED

This means more than just having pen and paper handy. It also means:

- Make sure you are on correct screen.
- Know your protocols and stay current on any changes or updates.
- Know the names of your co-workers.
- Master the telephone system—that includes transferring calls and putting callers on hold.

SMILE

Your voice should be enthusiastic and pleasant, yet professional. Avoid sounding artificial or mechanical. Keep your tone of voice natural and business like.

- Imagine that the caller is there in person.
- Put a smile in your voice.
- Keep a mirror next to your phone—the next time you answer the phone, make sure you're smiling!

ANSWER IMMEDIATELY

Try to answer right away.

- Check back every few minutes to update the caller and thank them for their patience.
- Use the caller's name-this helps regain his/her attention.
- If the caller is wishing to speak to someone else, ask if you can help.

TELEPHONE VOICE PERSONALITY

You must convey a feeling of friendliness, sincerity, understanding, and a true desire to be of service.

Your voice personality is where you will succeed or fail in your attempt to give a good impression of the company and yourself.

Your telephone voice personality is made up of the following:

PLEASANT VOICE

- Health
- Tone
- Enthusiasm and Alertness

EFFECTIVE SPEECH

- Good use of language
- Clear enunciation
- Good choice of words (words that are easily understood)

PERSONAL INTEREST

- Courtesy
- Understanding
- Explanation
- Empathy
- Helpfulness

TELEPHONE PERSONALITY

ANSWER PROMPTLY

MODERATE RATE

IDENTIFY YOURSELF

LISTEN

SMILE

SHOW INTEREST

CLEAR & DISTINCT

HELP CALLER

FURTHER QUESTIONS?

USE NAME

BEWARE OF THESE VARIATIONS OF TONE

CRITICAL:

You don't understand what I'm asking you.

INDIFFERENT:

It doesn't matter to me.

CONTRADICTORY:

That is not what I said.

INSULTING:

It's obvious you weren't listening to what I said.

BOSSY:

Give me the information.

WEAK AND
APOLOGETIC:

I'm really sorry for having to ask for the information again.

TALKING DOWN:

As I've explained to you before, that can't be done.

IMPLIED
CRITICISM:

If you have a specific problem, I'm sure that we can help you.

IMPLIED DOUBT:

You claim that your transportation did not arrive.

TRANSFERRING CALLS

- Explain what's happening
- Tell the caller to whom he/she is being transferred to
- Explain why
- Ask permission
- Give telephone number
- Don't cut caller off
- Thank them for calling
- Transfer the call

TEN SINS YOU CAN CONTROL

1. **“I don’t know.”** Callers expect you to know something about the service you provide. If you really can’t answer a question, add three essential words: “I’ll find out.”
2. **“I don’t care.”** Callers want you to care about serving them. They want to sense that you take pride in what you’re doing.
3. **“I can’t be bothered.”** Actions really do speak louder than words. If your conversation with a co-worker or personal call takes precedence over a caller, your caller will be annoyed-and rightfully so.
4. **“I don’t like you.”** Customers are sensitive to attitudes that say, “You’re a nuisance; please go away.”
5. **“I know it all.”** When you jump in with a solution or comment before a caller has finished explaining his or her problem or question.
6. **“You don’t know anything.”** When you rudely cut off, or put down callers for having a confused or wrong idea of what exactly they need or what you can do for them, you slam the door in their face.
7. **“We don’t want your kind here.”** Prejudice, like callers, comes in all shapes, sizes, ages, colors and educational levels. But regardless of class or category, every caller is an individual who wants and deserves to be treated with courtesy and respect.
8. **“Don’t call back.”** The purpose of providing excellent customer service is to convince them to call. The easiest way to discourage that is to make it clear in words that they’re an inconvenience in your day.
9. **I’m right and you’re wrong.** One of the easiest traps to fall into is arguing with a caller and is not professional customer service.
10. **“Hurry up and wait.”** Everyone starts with only twenty-four hours in a day. Respect your customer’s time and you’ll find they will respect you in return.

NEGATIVE WORDS AND PHRASES

I'm sorry, but...

You neglected to tell me...

I regret...

Obviously, you misunderstood...

I must receive an appropriate days notice

I'm forced to abide by company rules...

No, I can't do that...

POSITIVE WORDS AND PHRASES

Thank you for calling...

I'm confident that...

I understand your concern...

I appreciate you calling...

May I help you...

POSITIVE VS. NEGATIVE

Why should you choose positive words and expressions? They are friendlier. They give the impression that you want to help. They give the caller a good feeling about the company.

Change these responses so that they sound more positive.

1. I'm sorry for the delay.

2. I can't give that information over the phone.

3. No one is here right now who can help you, can you call back?

4. We don't handle that in this department.

5. Mrs. Jones isn't in today. Call back tomorrow.

NINE TIMES WHEN YOU SHOULD THANK CALLERS

- 1. When they do business with you...every time.** Thank them for calling; it is because of them that you have a business.
- 2. When they compliment you (or your company).** Compliments can be embarrassing. But shrugging off customers' sincere praise says, "You dummy, I'm not really that good." Instead, accept and say, "Thank you," and add, "I really enjoyed helping you out today."
- 3. When they offer comments or suggestions.** Thank them for their feedback and ideas. This says that you've heard them.
- 4. When they try a new company or service.** Trying something new can be uncomfortable, and risky.
- 5. When they recommend you to a friend.** This creates growth for the company.
- 6. When they are patient...and not so patient.** Thanking them for their patience says you notice and value their time. It's one of the quickest ways to defuse customers who have waited too long.
- 7. When they help you to serve them better.** When they are prepared and have their information at their fingertips. This makes your job easier.
- 8. When they complain to you.** Callers who tell you they are unhappy are giving you a second chance.
- 9. When they make you smile.**

FIVE OFTEN-FORGOTTEN THANK YOU'S

1. **Your co-workers**-Give credit to those who help you.
2. **Your boss**-When they give you the support you need.
3. **People in other departments of your company**-While you may be the only one actually talking to the customers, other departments make the service you deliver possible.
4. **Your transportation providers**-Without their professionalism, your customers wouldn't be receiving the satisfying service you're able to provide.
5. **You!**-You do a tough job and deserve a pat on the back. Give yourself credit for a job well done.

WINNING WORDS

Forbidden Phrase

Use Instead

1. I don't know.

"That's a good question. Let me check and find out."

2. We can't do that.

Let's see what we can do."
(Then find an alternate solution)

3. You'll have to...

"You'll need to," or "The next time that happens, here's what you can do."

4. Hang on a second: I'll be right back.

"It may take me two or three minutes (or however long) to get that. Are you able to wait a few moments while I check on that?"

5. No, when used at the beginning of any sentence.

Think before you speak. You can turn every answer into a positive response.

"We weren't able to arrange transportation for 1:00 pm, however we contacted your doctor and can attempt to arrange a ride for 7:00 am tomorrow, if this is convenient for you."

HELPFUL RESPONSES

"Good Morning"-or afternoon or evening.

"Thank you."

"I'll do that immediately," or "I'll take care of that for you."

"I understand how you feel"-when you do understand.

FOUR WAYS TO ESTABLISH YOUR TRADEMARK

1. Be reliable

Do what you say you are going to do, every time.

2. Call customers by name

People love to hear their own names, but make sure it is the name that they want to be called. When in doubt, start with the more formal title or ask what the customer prefers.

3. Spell the customer's name correctly

Spelling names demonstrates common courtesy and professionalism.

Example: Ms. Chris Smith- "Ms. Smith, could I just verify the spelling of your name? Is your last name S-M-I-T-H? or S-M-Y-T-H-E? And is your first name Chris with a C or Kris with a K?"

4. Recognize repeat customers

If you have a good memory, you may be able to recall a customer's name and details about their last service. "I believe we have spoken before, it is so nice to hear from you again." "How may I help you today?"

TO BUILD CONFIDENCE USE "I WILL..."

RATHER THAN:

"I'll try to get a ride for you for today."

2. "I'll try and transfer your call to the transportation line. You shouldn't have called me."

3. "Your timing couldn't have been worse. Our system is down at the moment."

4. "I'll try and get the ride to you in an hour, but it may take longer."

7. "I don't know, but I can try."

8. "I don't know if the reimbursement checks have gone out."

REPLACE WITH:

"I will call and try to find a ride for you today and get back to you right away."

"I will transfer your call to the transportation line. They better assist you."

"I will _____

_____"

USE "WILL YOU..."

RATHER THAN:

REPLACE WITH:

1. "You have to have your doctor fax us."

"Will you _____

_____"

2. "You should have called to register a complaint."

"Will you _____

_____"

3. "You have to call us in advance."

"Will you _____

_____"

4. "You didn't give me all the information."

"Will you _____

_____"

TO SAY "NO" COURTEOUSLY, USE "YOU CAN..."

RATHER THAN:

REPLACE WITH:

1. "We don't have that information. You would need to contact your doctors office." "You can _____
_____ " "
2. "There's nothing I can do for you. You have to call us in advance." "You can _____
_____ " "
3. "That's not our responsibility. You need to have all of your information ready." "You can _____
_____ " "
4. "You have given us the appointment at the last minute." "You can _____
_____ " "

Intentially
Left
Blank



Intentially
Left
Blank

Job Description 		Exempt	X		
		Non-exempt	-		
Full-time	X				
Part-time	-				
Location	Missouri				
Origination Date	1/05/04				
Last Revision Date	12/22/05				
Job Title	President and CEO	Page	1	OF	2
Department	Executive				
Reports to	Chairman of the Board				

Job Summary: The President and CEO is responsible for overseeing all functional units of MTM including: Operations, Technology, Finance and Accounting, Legal, Marketing, Sales and Business Development required to deliver and promote MTM's superior transportation management delivery. MTM's primary clients are state and county governments and managed care organization for which we provide transportation services for their Medicaid clients to reach necessary, non-emergency medical services. This position, located in the Lake St. Louis, MO, is responsible for:

- Reporting to the Board of Directors and the Chairman of the Board the status of operations, finances, sales/marketing and any risk issues.
- Developing the corporate strategy and key action items necessary to maintain and enhance MTM's position as a leading company for the deliver of non-emergency transportation.
- Coordinating all the functional units of MTM to ensure key action items and priorities are addressed.
- Instilling a culture of strong work ethics, high performance, ethics, client satisfaction and cost containment through a balance scorecard approach.
- Strategizing, planning and providing creation of innovative solutions for improving MTM's performance.

Primary Duties:

This position primarily focuses on ensuring that all core functional units perform superiorly so that MTM can deliver safe and qualified non-emergency transportation services to our clients, and exceed their expectations. This position is also in charge of:

- Establishing strategies to control costs and improve quality of service delivered.
- Creating and fostering a culture of teamwork, consensus leadership, excellence, pride and continuous improvement.
- Establishing outstanding customer service by maintaining excellent performance in the areas of service quality, cost containment and customer satisfaction.
- Promoting to Executive functional staff how to improve results by defining and directing the implementation of productivity improvement programs and strategies to maintain and enhance profitable operation of the company.
- Ensure quality and customer issues are addressed and monitored.

- Ensuring superior customer satisfaction by operating as the Executive sponsor for all client programs.

Required Background/Education:

- Demonstrated ability to manage through rapid growth.
- Experience directing multiple functional units, specifically sales/marketing, technology and product management.
- Superior project management skills.
- Demonstrated P/L responsibility in managing complex operations.
- Solid interpersonal and team-building skills to effectively communicate with employees.
- Proactive and creative techniques in solving operational problems.
- Bachelor degree required, with MBA or Masters in Operations Management preferred.
- Able to assess the "big picture" quickly
- Enjoys the challenge of focusing on maximizing productivity gains and developing quality improvements.

Required Skills:

1. Strong and visionary leadership skills.
2. Ability to work independently and as a team player, directing the work of others.
3. Excellent strategic and organizational skills.
4. High level of technical competence
5. Impeccable written and oral skills.

Signature: _____
President and CEO

Date: _____

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Original: Human Resources

<div style="text-align: center;">  MTM Medical Transportation Management, Inc. </div>		Exempt	X		
		Non-exempt	-		
		Full-time	X		
		Part-time	-		
		Location	Missouri		
		Origination Date	12/29/04		
Job Title	Executive Vice President, General Counsel	Last Revision Date	N/A		
Department	Legal				
Reports to	President/CEO and Board of Directors	Page	1	OF	2

Job Summary: The Executive Vice President, General Counsel is responsible for all legal and risk management issues pertaining to the operation and delivery of MTM transportation management services. MTM's primary clients are state and county governments and managed care organizations for which MTM provides transportation services for their Medicaid clients to reach necessary, non-emergency medical services. This position, located in the Lake St. Louis, MO, is responsible for:

- Preparation and review of transportation services contracts with state and local government entities and Managed Care Organizations.
- Preparation and review of contracts with over 300 transportation service provider companies.
- Preparation and review of all contracts with third party subcontractors and suppliers.
- Preparation, amendment and updating of MTM Transportation Provider Guidelines
- Responsible for all liability insurance (Auto liability, General liability, Workers Compensation, Excess Umbrella liability) and Risk Management matters.
- Responsible for obtaining and maintaining all contract performance bonds, payment bonds, and letters of credit from insurance companies and lending institutions.
- Responsible for management and supervision of all claims.
- HIPAA Privacy Officer responsible for compliance with HIPAA and related privacy and security laws and regulations.
- MTM Corporate Secretary responsible for all state corporate registrations and filings; maintaining the minutes and corporate books of MTM.
- Advise and counsel MTM owners and executive management on both strategic initiatives and day-to-day business operations and personnel matters.

Primary Duties:

This position primarily focuses on the legal aspects and implications of the entire business operations of MTM. This position is also in charge of:

- Implementing standardization of MTM Transportation Services Agreements with MTM Clients to promote operational and management efficiencies.
- Implementing standardization of MTM contracts with Transportation Provider companies to promote operational and management efficiencies.
- Implementing standardization of MTM Transportation Provider Guidelines to promote operational and management efficiencies.
- Implementing procedures and policies to reduce risk and control liability insurance costs

Required Background/Education:

- Juris doctorate (JD) degree and licensed to practice law before the Missouri Supreme Court and federal courts.
- A minimum of 10 years experience in corporate and business law. Experience in litigation matters preferred but not required.
- Ability to quickly assimilate complex information and assess the “big picture”.
- Ability to demonstrate sound decision-making judgment.

Required Skills:

- Extensive knowledge of contract law, liability risk laws, Medicaid government laws and regulations, and HIPAA privacy laws and regulations.
- Self-starter who can work independently and as a team player.
- Excellent strategic and organizational skills.
- Proficient written and oral skills.

Signature: _____
President and CEO

Date: _____

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Original: Human Resources

<p style="text-align: center;">Job Description</p> 		Exempt	X		
		Non-exempt	-		
		Full-time	-		
		Part-time	X		
		Location	Missouri		
		Origination Date	2005		
Job Title	Vice President Internal Audit	Last Revision Date			
Department	Executive				
Reports to	President and CEO	Page	1	OF	2

Job Summary: The Vice President of Internal Audits and Operational Reviews is responsible for the internal audit of critical operating functions within MTM, monitoring compliance with regulatory requirements and client contracts, and investigating isolated incidents of difficulties in all areas. All audits and reviews are to conclude with a report of findings and recommendations for resolution of any problems, recommendations for procedural improvements to prevent future recurrences or problems and recommendations for improvement in the accuracy or efficiency of processes.

This position located in the Lake St. Louis, MO office, has direct access to the Board of Directors and is responsible for:

- Reporting risk assessments as well as findings and recommendations resulting from internal audits, operational reviews and incident investigations to the, the Board of Directors and President and CEO.
- Strategizing, planning and providing solutions for improving MTM's performance, increasing the efficiency and/or accuracy of its reports, and decreasing the cost of operational processes.

Primary Duties:

This position primarily focuses on prevention, identification and resolution of operational problems. Performance of these duties is accomplished through:

- Preparing and maintaining functional organizational charts for operational tasks.
- Preparing and maintaining flowcharts of workflow processes.
- Identifying critical areas based on review of regulatory and contract requirements as reported by the MTM Compliance Officer and contract managers.
- Assessing risk through review of Medicaid regulations and specific contract requirements in conjunction with documentation of MTM Policies and Procedures as well as operational workflows and internal controls in place.
- Scheduling the periodic review of MTM Policies and Procedures and documented workflows to verify their completeness, continued existence, reliability and effectiveness for the prevention and detection of errors, irregularities and/or risk.
- Completing a periodic risk assessment based on review of internal controls and reports of incidents of operational difficulties.

- Communicating with management and the Board of Directors on a regular basis to maintain awareness of issues affecting internal controls in place to continue sound business operations and maintain compliance with regulatory and contract requirements.

Required Background/Education:

- Experience in business operations as evidenced by a job history of increasing levels of operational responsibility.
- Evidence of understanding and experience with the business cycle through financial reporting.
- Diversity in industry background and responsibility to provide the ability to work outside the box.
- Demonstrated ability to manage through rapid growth.
- Experience with audits and/or reviews under the supervision of appropriately certified trainers in internal or financial audits.
- Superior project management skills.
- Demonstrated P/L responsibility in managing complex operations.
- Solid interpersonal and team-building skills to effectively communicate with employees, management, other executives and the Board of Directors for MTM and its clients, customers, subcontractors and vendors.
- Proactive and creative problem solving techniques and experience.
- Bachelor degree required, with relevant advanced degree or certification preferred.

Required Skills:

1. Proficiency in the use of software for the gathering, assessing and reporting of data.
2. Ability to assess the "big picture" quickly
3. Ability to work independently and as a team player, directing the work of others.
4. Excellent strategic and organizational skills.
5. Enthusiasm for the challenge of internal controls and problem resolution in a rapidly growing and every changing company like MTM. High level of technical competence
6. Impeccable written and oral skills.

Signature: _____
President and CEO

Date: _____

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Original: Human Resources

<p style="text-align: center;">Job Description</p> 		Exempt	X		
		Non-exempt	-		
		Full-time	X		
		Part-time	-		
		Location	Missouri		
		Origination Date	9/16/02		
Job Title	Chief Financial Officer	Last Revision Date	12/25/04		
Department	Accounting and Finance				
Reports to	President and CEO	Page	1	OF	2

Job Summary: The Chief Financial Officer is responsible for overseeing the core financial functions required to deliver MTM's superior transportation management delivery. MTM's primary clients are state and county governments and managed care organization for which we provide transportation services for their Medicaid clients to reach necessary, non-emergency medical services. This position, located in the Lake St. Louis, MO, is responsible for:

- Managing the day to day operations of the accounting and finance departments include trip reconciliation, financial analysis, accounts payable and payroll.
- Identifying and prioritizing areas of improvement and project managing through completion.
- Instilling a culture of strong work ethics, high performance, ethics, client satisfaction and cost containment through a balance scorecard approach.
- Strategizing, planning and providing creation of innovative solutions for improving financial performance.
- Development of pricing strategies to ensure adequate return in order to invest in new technology and invest in company growth.
- Coordination of annual business planning and budget process.

Primary Duties:

This position primarily focuses on ensuring financial strength in all aspects of financial operations so that MTM continues to thrive and grow in serving its clients and customers. This position is also in charge of:

- Establishing strategies to control costs and improve quality of service delivered.
- Creating and fostering a culture of teamwork, consensus leadership, excellence, pride and continuous improvement.
- Establishing outstanding customer service by maintaining excellent performance in the areas of service quality, cost containment and customer satisfaction.
- Promoting to operational directors how to improve results by defining and directing the implementation of productivity improvement programs and strategies to maintain and enhance profitable operation of the company.
- Ensure quality and customer issues are addressed and monitored.
- Ensure financial deadlines are met or exceeded in terms of timely and accurate financial reporting, timely provider payments and accurate reconciliation of trip information.

Required Background/Education:

- Demonstrated ability to manage through rapid growth.
- Experience in the management of outsourced and regional operational centers.

- Experience interfacing between multiple functional units, specifically sales/marketing, technology and product management.
- Superior project management skills.
- Demonstrated P/L responsibility in managing complex operations.
- Solid interpersonal and team-building skills to effectively communicate with employees.
- Proactive and creative techniques in solving operational problems.
- Bachelor degree required, with MBA or CPA certification required.
- 10 years experience in either the transportation and/or healthcare industries preferred.
- Able to assess the “big picture” quickly and hit the floor running with strong decision-making abilities.
- Enjoys the challenge of focusing on maximizing productivity gains, attaining financial goals and developing quality improvements.

Required Skills:

- Strong and visionary leadership skills.
- Ability to work independently and as a team player, directing the work of others.
- Excellent strategic and organizational skills.
- High level of technical competence
- Impeccable written and oral skills.

Signature: _____
President and CEO

Date: _____

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Original: Human Resources

Job Description		Exempt	
			
		Full-time	X
		Part-time	
		Location	
		Origination Date	
Job Title	Project Director	Last Revision Date	1-16-06
Department	Operations		
Reports to	Senior Director of Operations	Page	1 OF 3

Job Summary: For MTM, a non-emergency transportation management company providing services to States, Counties and Managed Care Organizations for the delivery of their clients to medical appointments, the Project Director acts as the Internal Liaison and Project Manager who works in collaboration with all MTM corporate departments and the Client to ensure MTM is fully compliant with the State/County Medicaid requirements governing non-emergency transportation (NEMT) programs. The Project Director also ensures that individuals receiving MTM services receive the most appropriate, cost-effective delivery of transportation and ancillary services. This is a full-time position reporting to the Senior Director of Operations.

Primary Duties:

- Leads teams of direct reports and non-direct reports to ensure business outcomes and contract goals are defined and met.
- Plans continuously for growth and issue resolution.
- Works effectively through teams in a project management focused approach.
- Works with the Client to follow through on service issues, trouble shooting problems and concerns, complaints and education;
- Reviews service delivery to ensure that the most cost-effective mode of transportation is utilized;
- Manages branch office staff responsibilities (if applicable);
- Acts as a liaison between MTM and external stakeholders to educate on MTM services and ensures customer satisfaction;
- Creates detailed staffing plan (if applicable);
- Maintains a good understanding of the Clients Transportation program rules, regulations and policies;
- Identifies and manages stakeholders' expectations during all phases of the contract;
- Keeps abreast of changes to NET program rules, regulations and policies;
- Acquires a good understanding of State/County, and local climate and issues pertaining to the NET program;
- Active involvement in State/Government programs and transportation related conferences/seminars;

- Provides retrospective analysis of MTM services to ensure appropriate use of services;
- Reports problems or concerns of client to Senior Director, and Executive staff as needed;
- Disseminates educational material to clients as needed;
- Ensures ongoing compliance to MTM's Quality Management Program;
- Gains and maintains in-depth knowledge of MTM *Transportation Guidelines and Vendor Quality Improvement Program*;
- Provides oversight and management of the Customer Service Center;
- Gains and maintains in-depth knowledge of MTM departments;
- Assures good working relationships and high levels of communication among office staff, MTM departments, Client, stakeholders, and other vendors working within the contract;
- Provide updates to MTM Protocols;
- Responsible for building (or assuring building of) requirements documents and Work Plans as needed;
- Provides necessary data and information to MTM staff assisting in the continuous monitoring and coordination of quality management activity; i.e. credentialing, re-credentialing, and quality management;
- Personally participates in the requirements gathering and analysis as needed;
- Provides a weekly status report on accomplishments, issues and concerns;
- Prepares for, coordinate and conduct quarterly in-service with each client;
- Provides ongoing, day-to-day service support to client personnel;
- Establishes rapport with the client representatives and/or personnel;
- Learns and understands all aspects of the program, its benefit parameters and contract;
- Be available as client's key contact for any issues relating to the program;
- Address all issues in a timely manner to the satisfaction of the client and MTM;
- Educate clients on MTM procedures and services;
- Inform clients of new items relating to the NET industry and/or MTM services;
- Present annual plan reviews and work in a consultative manner with clients;
- Ensure all paperwork is complete, up-to-date and correctly filed for each plan;
- Other duties as assigned by Senior Director.
- Regular attendance is required.

Required Education:

- Bachelor's Degree Required
- Certified Project Management Professional or Associate Certification desired (PMI)

Required Experience:

- Management experience required;

- Previous experience working with Medicaid and or State programs preferred.
- Experience working for a managed care health provider preferred.

Required Skills:

- Prior project or contract management experience
- Excellent interpersonal skills and ability to work with a variety of people and job positions;
- Knowledge of managed care, QI and contracting;
- Experience establishing key processes and procedures;
- Ability to acquire in-depth knowledge of MTM operations;
- Experience in operations and management of staff;
- Experience in developing, promoting, and building key relationships with all key stakeholders;
- Data analysis and interpretation skills;
- Problem solving skills;
- Ability to schedule, organize and prioritize multiple tasks;
- Experience supervising and monitoring the delivery of contractual services;
- Knowledge of budgets and cost analysis;
- Excellent communication skills, verbal and written;
- Ability to handle questions and resolve issues in a constructive manner;
- Moderate to advanced computer skills.

Signature: _____
Senior Director of Operations

Date: _____

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Original: Human Resources
Cc: Department Director
Employee

<p style="text-align: center;">Job Description</p> 		Exempt		Yes	
		Non-exempt		N/A	
		Full-time		Yes	
		Part-time		N/A	
		Location		Missouri	
		Origination Date		11/05/01	
Job Title	Quality Manager	Last Revision Date		12/22/05	
Department	Quality Management				
Reports to	Senior Director of Operations	Page	1	OF	2

Job Summary:

The Quality Manager (QM) is responsible for all Quality Management daily operations and for supervision of the Quality Service Coordinators. The primary function is to assure compliance with all MTM Quality Management established protocols and procedures and ensure quality service. The Quality Manager is a salaried, exempt position.

Primary Duties:

- Coordinate all daily activities for the Quality Service Coordinators (QSC) and provide on-going monitoring of the QSC.
- Take and resolve calls and issues which require a supervisor intervention.
- Work closely with the Network Management Department to resolve vendor complaints, issues, and any trip discrepancies. Send notice to Network Management for vendor suspension due to noncompliance.
- Review and analyze weekly/monthly reports before sending to Client.
- Assist the Sr. Director of Operations with interviewing and hiring.
- Oversee staffing and scheduling of QSC to ensure adequate coverage.
- Assist the Sr. Director of Operations in establishing policies and procedures and update or revise as necessary.
- Assume the duties of the Director of Operations in his/her absence.
- Provide feedback and counseling on performance issues with QSC.
- Enforce all MTM established Quality Management protocols and MTM Personnel policies.
- Create weekly agenda for weekly QM staff meetings.
- Track time off (vacation and sick) of nonexempt staff.
- Demonstrate sincere personal commitment to promptness, reliability and quality work.
- Other duties as assigned

Required Education:

- BS or BA in Health related field preferred.

Required Experience:

- Experience in Quality Management preferred.
- Previous experience in a management position preferred.
- Transportation or healthcare experience preferred.

Required SHIs:

- Strong knowledge of Continuous Quality Improvement (CQI) Process.
- Knowledge of DMAS/State operations.
- Knowledge of AS400 preferred.

- Strong managerial and communication skills, both written and verbal.
- Computer skills to include Word, Excel, Access, and Power Point preferred.
- Ability to work with multiple situations and handle diverse issues.
- Able to multi-task in a fast paced environment.

Signature: _____
Senior Director of Operations

Date: _____

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Original: Human Resources

<p style="text-align: center;">Job Description</p> 		Exempt	Yes	
		Non-exempt	N/A	
		Full-time	Yes	
		Part-time	N/A	
		Location	Missouri	
		Origination Date	11/12/03	
Job Title	Director of Network Management	Last Revision Date	12/23/05	
Department	Network Management			
Reports to	Senior Director of Operations	Page	1	OF 2

Job Summary:

The Director of Network Management is a full-time position reporting to the Senior Director of Operations. The primary function of the Director of Network Management is to oversee and direct all operations and management of the Network Management Department. In addition, this role is responsible for ensuring the integrity and quality of the MTM Network of Vendors.

Primary Duties:

- Coordinate and participate in all annual Vendor meetings.
- Participate in all Vendor Advisory Committee meetings.
- Conduct weekly Network Management meetings.
- Support marketing and sales of the MTM program.
- Participate in orientation for newly acquired Clients.
- Directly supervise and evaluate the Network Management Manager and Vendor Education Liaison/Supervisor.
- Oversight for all Network Management staff and functions.
- On going development and monitoring of the quality of the Network Management Program to ensure MTM is meeting the needs of its Clients.
- Review all Vendor contracts for accuracy and completeness prior to executive management signature(s).
- Provide oversight to the Network Management Credentialing Program to ensure compliance to the MTM program.
- Provide oversight to the Network Management GEO Access Program to ensure an adequate network of qualified Vendors in the MTM network.
- Control the overall trip cost by effective management of the MTM Vendor Network.
- Regular attendance required.
- Report directly to the Senior Director of Operations.
- Work closely with all Directors and Staff.
- Direct management of the Network Management Manager and Vendor Education Liaison/Supervisor.
- Advisory member for MTM Vendor Advisory Committees.
- Active member of the MTM Management Committee.

- Active member of the MTM Quality Improvement Committee.

Required Education:

- Bachelors Degree or higher
- Five years management experience network of providers and external representatives.

Required Experience:

- Extensive HealthCare Management background.
- Extensive Supervisory and Management background.
- Background in program evaluation and improvement.
- Background in staff development.
- Background in contract negotiations.
- Experienced in working with a large and multi-faceted staff.

Required SHls:

- Excellent interpersonal skills and ability to work with and manage a variety of people.
- Excellent communication skills.
- Excellent negotiation and problem solving skills.
- Strong leadership skills.
- Good analytical ability.
- Ability to develop programs.

Signature: _____
Senior Director of Operations

Date: _____

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 Job Description MTM Medical Transportation Management, Inc.		Exempt	Yes
		Non-exempt	NA
		Full-time	Yes
		Part-time	No
		Location	Corporate
		Origination Date	10/1/2002
		Last Revision Date	6-26-2006
Job Title	Public Transit Coordinator		
Department	Network Management		
Reports to	Director of Network Management	Page	1 OF 2

The **Public Transit Administrator** is responsible for overseeing research, evaluation and utilization of public transit and non-profit public entities in regions where MTM provides or seeks to provide NEMT services. The Public Transit Administrator is responsible for maintaining strong public relations through development of regional public transit/entity action teams that address regional healthcare access utilizing state, county, city and regional public transit and non-profit agencies. The **Public Transit Administrator** is a salaried, exempt position.

Primary Duties:

1. Elevate MTM's name and product recognition by developing relationships with State DOTs and State, Regional and National Transit Associations and Transit Industry related associations.
2. Assist in development of business opportunities for MTM with ~~hited~~ We Ride and ADA transportation.
3. Monitor, build, and improve provision of NEMT services through appropriate use of Public Transit/Entity services.
4. Oversee the identification of all public transit/entities in targeted regions.
5. Oversee new program implementation in relation to public transit/entity.
6. Oversee development of staff training program for public transit.
7. Identify and oversee corporate compliance with all relative federal, state, city, and regional guidelines pertaining to MTM's usage of public transit
8. Advise MTM on public transit/entity usage for target areas and RFP response.
9. Oversee Public Transit Specialist
10. Other Duties as assigned

Required Education:

1. Bachelors Degree and 14 years experience in public, non-profit transportation field.

Required Eperience:

1. Excellent communication skills.
2. Extensive knowledge of Federal and state regulations governing public transit/entity s
3. Experience in administering a non-profit, public transit/entity program.
4. Experience in new product development and implementation.
5. Ability to work independently, with minimal supervision.

6. Experience in conducting providing quarterly and annual reports, program analysis, developing program goals and objectives.
7. Knowledge of MTM NET Management System.
8. Ability to accommodate multi-task projects.
9. Exceptional organizational skills.
10. Knowledge of Provider Network Systems.

Relationships:

1. Reports directly to Director of Network Management at corporate offices in Lake Saint Louis, Missouri.
2. Works with departments on nontraditional coordinated transportation contracts.
3. Work closely with all public transit/entity contacts.
4. Working relationship with Provider Area Liaisons.
5. Working relationship with Network Management Representatives.
6. Working relationship with BSG.

Signature: _____
Department Director

Date: _____

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Original: Human Resources
Cc: Department Director
Employee

<p style="text-align: center;">Job Description</p> 		Exempt	X	
		Non-exempt		
		Full-time	X	
		Part-time		
		Location	Missouri	
		Origination Date	4/9/04	
Job Title	Utilization Care Manager	Last Revision Date	N/A	
Department	Operations			
Reports to	Senior Director of Operations	Page	1	OF 2

Job Summary: The Utilization Care Manager works in collaboration with operations, MTM support departments and transportation providers to ensure the most cost-effective delivery of transportation and ancillary services. The Utilization Care Manager is a full-time position reporting to the MTM Chief of Operations and Marketing Sales Director.

Primary Duties:

- Monitor and analyze gatekeeping activities to ensure the most appropriate use of transportation modes were chosen by responsible departments;
- Direct the provision of high quality, appropriate, cost-effective transportation services;
- Organize systematic data collection for analysis and interpretation of transportation and ancillary services and outcomes, including identification of transportation provider patterns;
- Identify cases for Case Management and coordinate and evaluate the needs of the recipient;
- Provide necessary data and information to MTM staff who assist in the continuous monitoring and coordination of quality improvement activity; i.e. credentialing and recredentialing and quality management;
- Manage the Social Services and Customer Service Center functions through providing direct leadership to the directors and managers of these departments, as well as the activities of these departments.
- Provide a prospective, concurrent and retrospective analysis and management of transportation and related services;
- Through the execution of MTM policies and procedures, ensure that recipients receive the appropriate level of transportation and related services at the right time.
- Other duties as assigned.

Required Education: College degree required, nursing degree required.

Required Experience:

- Nursing background required;
- Management experience required; previous experience as a Utilization or Case Management.
- Previous experience working with Medicaid and or State programs required; and
- Experience working for a managed care health plan.

Required Skills:

- In-depth knowledge of utilization and Case Management ;
- Data analysis and interpretation skills;
- Excellent interpersonal skills;
- In-depth knowledge of managed care, QA, and contracting;
- Problem solving skills;
- Ability to schedule, organize and prioritize multiple tasks;
- Knowledge of budgets and cost analysis;
- Excellent communication skills, verbal and written;
- Moderate to advanced computer skills.

Signature: _____
Department Director

Date: _____

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Original: Human Resources

<p style="text-align: center;">Job Description</p> 		Exempt	X		
		Non-exempt			
		Full-time	X		
		Part-time			
		Location	Missouri		
		Origination Date	04-05-04		
Job Title	Director of Business Solutions	Last Revision Date	12/22/05		
Department	Technology				
Reports to	President and CEO	Page	1	OF	2

Job Summary:

This is a key leadership and hands-on position of the Business Solutions group in MTM Technology Organization, responsible for the analysis, architecture and definition of business technology solutions and services for the entire MTM operation.

Primary Duties:

Directing and managing a team of business and data analysts; working with cross-functional teams and subject matter experts in:

- Business systems analysis, planning, conceptualization and architecture
- Business systems software requirements specifications
- Business technology solutions/services identification and specifications
- Business systems testing, documentation, training and education
- Data management, information delivery and analysis
- Business process analysis, benchmarking, modeling and optimization
- Project, quality, efficiency and process management assistance

Required Background/Education:

- Bachelor's degree in computer engineering, or equivalent combination of education and experience
- 10+ years in Information Technology, with 4+ years from major IT organizations
- Hands-on business analysis and software requirements specifications for major complex software applications/products that support critical business process and operations
- Client-server/N-Tier software architecture and e-business technology
- Project management of full life cycle software development with 10+ team members
- Strategy, operational planning and execution
- Transportation and healthcare information technology experiences - strong plus
- Call center, data center, data warehousing, internet services and ERP system experiences - strong plus

Preferred:

- MBA
- Formal requirement and project management methodologies and tools experience
- Department/staff management experience
- Prior software design and programming experience
- Quality and process management and improvement experience

- Entrepreneur/startup experience

Required Skills:

- Data, business logic and business process modeling
- Data analysis, business process analysis and optimization
- Business requirement identification and software requirement specifications
- Business systems solutions conceptualization and design
- Interaction with project stakeholders and cross-functional teams
- Requirement triage, scope management, revision/change management
- Strong written and verbal communication
- Strategy, people and operations

Signature: _____
President and CEO

Date: _____

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Original: Human Resources

<p style="text-align: center;">Job Description</p> 		Exempt	X		
		Non-exempt			
		Full-time	X		
		Part-time			
		Location	LSL		
		Origination Date	10-01-04		
Job Title	Manager of Business Systems	Last Revision Date	1-17-06		
Department	Business Solutions				
Reports to	Director, Business Solutions	Page	1	OF	2

Job Summary:

The Manager of Business Systems is responsible for the analysis, architecture and specifications of effective, efficient and innovative business technology solutions and services, particularly in the form of *business application systems* and *information delivery*, to support, grow and transform the overall MTM business processes and business operations.

Furthermore, the successful candidate will provide *project management services* in the development, promotion, adoption and operations of the business technology solutions and services to achieve maximum business benefits. The successful candidate will participate in *business process management* and *information analysis* as well.

Essential Job Requirements:

This role is expected to provide critical contributions to Business Solution's overall effort in delivering and promoting effective, efficient and innovative technology solutions and strong MTM competitive advantages through:

- Business process analysis, benchmarking, modeling and optimization
- Business systems analysis, planning, conceptualization and architecture
- Business technology solutions/services identification and specifications
- Business systems software requirements specifications
- Business systems testing, documentation, training and education
- Information Analysis and Business Intelligence
- Project, quality, efficiency and process management assistance

This position requires working closely with all groups within Business Solutions and collaborating with all cross-functional teams and subject matter experts across the entire company.

Required Education:

- Bachelor's degree (or equivalent combination of education and experience) in computer engineering or business
- MBA, plus
- PMP Certification, plus

Required Experience:

Required:

- 7+ years in Information Technology, with 3+ years of hands-on experience and proven success track record in business process optimization, business system solution definition, and software requirements specifications in support of critical business process and operations
- Experience of authoring software requirement specifications for large and complex business application systems, preferably using industry best practices, tools and methodologies
- Experience of authoring test plans and conducting testing, preferably using industry best practices, tools and methodologies
- Experience of software development project management, preferably using industry best practices, tools and methodologies through full Software Development Life Cycle (SDLC) project with 8+ team members in Client-server/N-Tier software architecture and e-business technology technical environment
- Healthcare industry and healthcare information technology experiences:
 - Medicare/Medicaid, MCOs, ADA, provider, fraud and abuse management
 - Eligibility verification, HIPPA, claims/reimbursement
 - Case and utilization management, disease and wellness Management

Preferred:

- Transportation and supply chain industry and technology experiences
 - Demand and response transportation, public transit transportation
 - Territory and fleet planning, route building and route optimization
 - Vehicle routing, scheduling and dispatching
 - Geographic Information System (GIS), Global Positioning System (GPS), Automatic Vehicle Location (AVL), Mobile Data Terminal (MDT)
- Call center technology experience with some or all of the following
 - ACD, skills routing IR
 - CTI, IP Telephony
- Data warehousing, internet services and ERP system experiences
- Supply Chain Management, logistics and resource optimization
- Prior software design, programming, software quality assurance and process and improvement experience
- Entrepreneur/startup experience

Required Skills:

- Business systems solutions conceptualization and design
- Data, business logic and business process modeling
- Data analysis, business process analysis and optimization
- Business requirement identification and software requirement specifications
- Interaction with project stakeholders and cross-functional teams
- Requirement triage, scope management, revision/change management
- Requirement analysis, specification and management methodologies and tools
- Strong analytical skills and strong written and verbal communication

<p style="text-align: center;">Job Description</p> 		Exempt	X		
		Non-exempt			
		Full-time	X		
		Part-time			
		Location	LSL		
		Origination Date	10-25-04		
Job Title	Manager, Technology Operations	Start Date	ASAP		
Department	MTM Technology Organization (MTO)				
Reports to	President and CEO	Page	1	OF	3

Job Summary:

As the leader of the Technology Operations group, the *Manager, Information Technology* is responsible for the overall technology operations for the entire MTM business operations in the following areas: *Data Management, Database Management, Middleware Management, and Business Systems Operations Support.*

This is both a leadership and hands-on technical position.

Primary Duties:

The primary duties include:

- Align the Technology Operations group with MTM business objectives and business requirement in MTM's challenging and dynamic business growth environment
- Enhance Technology Operations group's organizational capabilities and operational excellence through people process, strategy process, technology process and operations process
- Maintain and exceed operations/service level agreement (OLA/SLA)
- Conduct overall *Data Management* for medical transportation management, quality/financial management and information delivery services through:
 - Data Collection and Data Entry
 - Data Extraction, Translation and Loading (ETL) and Data Integration
 - Data Quality, Data Integrity, and Data Backup
 - Data Processing (Medical Eligibility Processing, Claims Processing, Billing, Reimbursement, Re-conciliation, Auditing, etc.)
 - Data/Information Delivery (Ad Hoc Reporting, Batch Reporting, EDI, etc.)
- Conduct *Database Management Administration* for MTM production databases (MS SQL Server, Oracle)
- Conduct *Middleware Management* for MTM production systems (Web/Application Servers, Load Balancers, etc.)
- Ensure and support correct and reliable operations of MTM *Business Systems* and facilitate MTM users to use/operate them correctly, effectively and efficiently through:

- Help/Service Desk
- Systems Production Testing
- Production System Deployment
- Health Monitoring
- etc.
- Assure data/information security and privacy (HIPPA Compliance)

Qualifications

Required Education:

- Bachelor's degree in computer science/engineering, or equivalent combination of education and experience
- Advanced degree - plus

Required Experience:

- 6+years in Information Technology with a focus on data management and business systems operational support in a mission-critical environment
- Experience with IT service management, operations/service level agreement management
- Proven track record of building and leading customer-oriented and effective technology operations team
- Solid experience in medical/healthcare Electronic Data Interchange (EDI) with standard and non-standard EDI formats, in particular, with ANSI X12 standards
- Medical eligibility data processing, claims/reimbursement data processing
- Experience/Knowledge with Database Administration and Data Reporting

Preferred Experience:

- Middleware experience such as Web Server, Application Server, etc
- Data Modeling, Data warehousing/OLAP experience
- Transportation industry and Information technology experience
- Call center and data center technology and operations experience
- ERP and CRM system experience
- ITIL service delivery and service support framework experience/knowledge

Required Skills:

- Project management, staff management and client services
- Written and verbal communication and interpersonal skills
- ANSI X12 (such as 834, 270/271, 837P, etc.)
- IT Service/Help Desk structure, process and tools
- Relational database management systems MS SQL Server, Oracle, MS Access
- Report development tools such as Crystal Report,
- SQL(TSQL, PL/SQL),

Preferred Skills:

- IT service management tools
- Data manipulation/ETL tool(s) such as Data Junction, Informatica, DTS
- Data modeling/design tools such as ERWin, TOAD, etc
- Data mining, data warehousing and business intelligence
- ~~Qual~~ Basic/~~BA~~, stored procedure, and various scripting languages such as Perl, DOS and ~~h~~x Shell script
- Internet Information Server(IIS)/Apache
- HTTP, HTML, JavaScript, ASP, XML, SOAP

Signature: _____
Department Director

Date: _____

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Original: Human Resources

<p style="text-align: center;">Job Description</p> 		Exempt	X		
		Non-exempt			
		Full-time	X		
		Part-time			
		Location	Missouri		
		Origination Date	4/9/04		
Job Title	Utilization Care Manager	Last Revision Date	N/A		
Department	Operations				
Reports to	Senior Director of Operations	Page	1	OF	2

Job Summary: The Utilization Care Manager works in collaboration with operations, MTM support departments and transportation providers to ensure the most cost-effective delivery of transportation and ancillary services. The Utilization Care Manager is a full-time position reporting to the MTM Chief of Operations and Marketing Sales Director.

Primary Duties:

- Monitor and analyze gatekeeping activities to ensure the most appropriate use of transportation modes were chosen by responsible departments;
- Direct the provision of high quality, appropriate, cost-effective transportation services;
- Organize systematic data collection for analysis and interpretation of transportation and ancillary services and outcomes, including identification of transportation provider patterns;
- Identify cases for Case Management and coordinate and evaluate the needs of the recipient;
- Provide necessary data and information to MTM staff who assist in the continuous monitoring and coordination of quality improvement activity; i.e. credentialing and recredentialing and quality management;
- Manage the Social Services and Customer Service Center functions through providing direct leadership to the directors and managers of these departments, as well as the activities of these departments.
- Provide a prospective, concurrent and retrospective analysis and management of transportation and related services;
- Through the execution of MTM policies and procedures, ensure that recipients receive the appropriate level of transportation and related services at the right time.
- Other duties as assigned.

Required Education: College degree required, nursing degree required.

Required Experience:

- Nursing background required;
- Management experience required; previous experience as a Utilization or Case Management.
- Previous experience working with Medicaid and or State programs required; and
- Experience working for a managed care health plan.

Required Skills:

- In-depth knowledge of Utilization and Case Management ;
- Data analysis and interpretation skills;
- Excellent interpersonal skills;
- In-depth knowledge of managed care, QA, and contracting;
- Problem solving skills;
- Ability to schedule, organize and prioritize multiple tasks;
- Knowledge of budgets and cost analysis;
- Excellent communication skills, verbal and written;
- Moderate to advanced computer skills.

Signature: _____
Department Director

Date: _____

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Original: Human Resources

<p style="text-align: center;">Job Description</p> 		Exempt	Yes
		Non-exempt	N/A
		Full-time	Yes
		Part-time	N/A
		Location	Wash, D.C.
		Origination Date	11/10/06
Job Title	Senior Manager Education and Training of Transportation Providers and Recipients	Last Revision Date	
Department	Network Management		
Reports to	W of Operations	Page	OF 2

Job Summary:

The Senior Manager Education and Training is a full-time position reporting to the W of Operations and an indirect reporting structure to the Client's Program Manager. The primary function is to oversee and direct all training to their assigned service area. Training is required for medical facilities, transportation providers, recipients and other senior managers with MTM. In addition, this role is responsible for ensuring the integrity and quality of the MTM Network of Transportation Providers.

Primary Duties:

- Community-based outreach and education
- Day-to-day relationship development with facilities
- Day-to-day management of service requests
- Coordination of driver/attendant training program
- Problem resolution and quality
- Staff oversight -- will perform data analysis and reporting
- Works closely with transportation providers and health care facilities to resolve problems
- Directs and supports office staff in pursuit of excellent management of the program
- Maintains open lines of communication with subordinates, other company representatives, facilities and carriers, and local and state authorities
- Local travel required
- Coordinates and participates in all annual transportation provider meetings
- Participates in all Provider Advisory Committee meetings
- Directly supervises and evaluates the Provider Area Liaison, Network Management Representative, and Routing and Public Transit Coordinator
- Oversight for all Network Management staff and functions
- On-going development and monitoring of the quality of the Network Management Program to ensure MTM is meeting Client needs
- Provide oversight to the Network Management Credentialing Program to ensure compliance to the MTM program

- Regular attendance required
- Works closely with all Directors and Staff
- Advisory member for MTM Provider Advisory Committees

Required Education:

- Bachelors Degree or higher
- Five years management experience network of providers and external representatives

Required Experience:

- Extensive Health Care Management background.
- Extensive Supervisory and Management background.
- Background in program evaluation and improvement.
- Background in staff development.
- Background in contract negotiations.
- Experienced in working with a large and multi-faceted staff.

Required Skills:

- Excellent interpersonal skills and ability to work with and manage a variety of people.
- Excellent communication skills.
- Excellent negotiation and problem-solving skills.
- Strong leadership skills.
- Good analytical ability.
- Ability to develop programs.

Signature: _____
President and CEO

Date: _____

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<p style="text-align: center;">Job Description</p> 		Exempt	Yes
		Non-exempt	N/A
		Full-time	Yes
		Part-time	Yes
		Location	Out of Area
		Origination Date	11/12/03
Job Title	Area Liaison	Last Revision Date	07/08/04
Department	Network Development		
Reports to	Director of Network Management	Page	1 OF 2

Job Summary:

The Area Liaison is a full-time or part-time position reporting to the Network Development Manager. The Area Liaison is a main liaison between Medical Transportation Management (MTM) and the transportation providers. The primary function of the Area Liaison is to assure compliance with MTM Vendor Guidelines, and education of the vendors regarding the guidelines, which are the basis of the Vendor Quality Assurance and Improvement Program.

Primary Duties:

- Assist Vendors in compliance with MTM Vendor Guidelines.
- Perform Site Visits of current Vendors.
- Perform Initial Credentialing Visits of Vendors.
- Complete reports of Site Visits.
- Follow up on compliance with recommendations as a result of Vendor evaluations.
- Coordinate Vendor education opportunities and schedules.
- Provide assistance regarding implementation of MTM Vendor Guidelines.
- Provide interpretation and assistance in compliance with all MTM policies and reporting procedures.
- Maintain a QA file folder on all Vendors and ensure all documentation is present and current.
- Perform Street Observations of Vendor vehicles, drivers and services
- Document Street Observations and provide input to Vendors on both positive and negative findings.
- Assist the Network Development manager in creating a file of acceptable templates and prototypes of documents to assist Vendors.
- Perform vehicle inspections and document findings.
- Assist with Vendor in-service training, driver training, and other presentations to Vendors and their drivers.
- Provide information and suggestions to MTM administration on changes or revisions that need to be made to MTM Vendor Guidelines.
- Assist Vendors to obtain training or other needs in areas identified as needing improvement.

- Participate in planning and execution of Regional Vendor meetings.
- Regular attendance required.
- Reports directly to the Network Development Manager.
- Works closely with all Vendors.
- Functions as an advocate for the Vendor and provides assistance in needed areas.
- Works with drivers on an as needed basis.
- Works closely with QI Complaints Department to review trends in Vendor services and address problem areas.
- Coordinates with other Area Liaisons.
- Works closely with MTM Network Development staff.
- 26. Function as the MTM representative with any transit companies in the Area Liaisons territory.

Required Education:

- High School Diploma required; college preparation preferred.

Required Experience:

- In-depth knowledge of MTM Vendor Guidelines and other required MTM policies and procedures.
- Working knowledge of Department of Transportation (DOT) regulations and Occupational Safety and Health Administration (OSHA) regulations.
- Previous experience in working in a supervisory or oversight position preferred.
- Previous experience in the transportation industry preferred.

Required Skills:

- Excellent interpersonal skills and ability to work with a variety of Vendors.
- Ability to schedule, organize, and prioritize multiple tasks.
- Excellent communication skills, both written and verbal.
- Ability to provide information and materials in helpful and meaningful ways to Vendors and drivers.
- Ability to handle questions and resolve conflicts in a constructive manner.
- Knowledge of general vehicle maintenance requirements.
- Basic to moderate computer skills.

Signature: _____
Department Director

Date: _____

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<p style="text-align: center;">Job Description</p> 		Exempt	X		
		Non-exempt			
		Full-time	X		
		Part-time			
		Location	ALL		
		Origination Date	5-22-2000		
Job Title	Manager, Customer Service	Last Revision Date	12-22-2005		
Department	Customer Service				
Reports to	Senior Director of Operations	Page	1	OF	2

Job Summary: The Customer Service Manager (CSM) is responsible for Customer Service daily operations and for supervision of the Team Leads, Lead Operator, and Customer Service Representative (CSR). The primary function is to assure compliance with all Customer Services established protocols and procedures and ensure customer satisfaction. The Customer Service Manager is a salaried, exempt position

Primary Duties:

- Coordinate all daily activities of Customer Service.
- Work closely with the Customer Service Director in analyzing weekly statistic reports.
- Interview and hire CSR.
- Oversee staffing and scheduling of all CSRs to ensure adequate phone coverage.
- Assist the Customer Service Director in establishing process and procedures to handle each client's business.
- Work closely with transportation providers to resolve any trip discrepancies.
- Work closely with the IS to keep Customer Service equipment running properly.
- On-going monitoring of CSRs to provide assistance and guidance to ensure quality service to our customers.
- Provide feedback and counseling on performance issues regarding Customer Service staff within 48 hours of notice from HR or day of performance situation.
- Ensure performance reviews and recommendations for increases for customer service staff are completed timely.
- Coordinate resolution to issues with other departments as needed
- Manage resources to meet all client's service standards.
- On-going review of processes to identify areas of improvement and recommend changes.
- Provide support, guidance, and feedback to Team Leaders.
- Respond to employee's question/concerns within 24hours.
- Provide motivation and recognition to the Customer Service.
- Work closely with trainer to evaluate the training materials and processes.
- Reports to work as assigned and demonstrates sincere commitment to quality work.
- Additional duties and projects as assigned.
- Enforce all established Customer Service protocols and personnel policies

Required Education:

- Bachelor Degree preferred.

Required Experience:

- Five years experience in business, customer service or call center operations.
- Previous experience in supervision required.
- Worked as a Team Lead, Lead Operator, or CSR in MTM's Customer Service preferred.

Required Skills:

- Strong communication skills, both written and verbal.
- In-depth knowledge of MTM established Customer service protocols and MTM Personnel policies.
- In-depth knowledge of Transportation Provider Network system.
- Ability to resolve personnel issues.
- Ability to work with multiple situations and handle diverse issues.
- Able to multi-task in a fast paced environment.
- Strong telephone and computer skills.

Signature: _____
Senior Director of Operations

Date: _____

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Original: Human Resources
Cc: Department Director
Employee

		Exempt	X		
		Non-exempt			
		Full-time	X		
		Part-time			
		Location	LSL		
		Origination Date	5-22-2000		
Job Title	Manager/Supervisor, CSC	Last Revision Date	5*9*06		
Department	C1				
Reports to	Senior Call Center Manager	Page	1	OF	3

POSITION SUMMARY: The Customer Service **Manager/Supervisor** is responsible for Customer Service daily operations and for supervision of the Trainer, Team Leads, Support Staff and Customer Service Representatives (CSRs). The primary function is to assure compliance with all Customer Services established protocols and procedures and ensure customer satisfaction. The Customer Service Manager/Supervisor is a salaried, exempt position.

ESSENTIAL JOB FUNCTIONS:

- * Coordinate all daily activities of the CSC.
- * Analyze daily, weekly and monthly statistics reports and make necessary changes in staffing and workflow processes.
- * Interview and hire staff as needed.
- * Oversee staffing and scheduling of all CSRs to ensure adequate phone coverage.
- * Establish processes and procedures to handle each client's business, update or revise as necessary.
- * Work closely with Marketing to ensure smooth implementation of new plans.
- * Work closely with the IT to keep CSC equipment running properly.
- * Provide feedback and counseling on performance issues regarding CSC staff within 48 hours of notice from H/R or day of performance situation.
- * Ensure performance reviews and recommendations for increases for CSC staff are completed timely.
- * Coordinate resolution to issues with other departments as needed
- * Manage resources to meet all clients' service standards.
- * Direct contact for health plan representative with CSC issues or transportation requests.
- * On-going review of processes to identify areas of improvement and recommend changes.
- * Provide support, guidance, and feedback to Team Leads.
- * Respond to employee's question/concerns within 24hours.
- * Provide motivation and recognition to the CSC.
- * Work closely with trainer to evaluate the training materials and processes.
- * Enforce all established CSC protocols and personnel policies.
- * Responsible for completing and turning in new hire forms, change forms, transfer forms and severance forms to H/R.

- * Participate in QMC and PRPD meetings.
- * Reports to work as assigned and demonstrates sincere commitment to quality work.

MARGINAL JOB FUNCTIONS:

Other duties as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES:

1. Strong communication skills, both written and verbal.
2. In-depth knowledge of MTM established CSC protocols and MTM Personnel policies.
3. In-depth knowledge of Transportation Provider Network system.
4. Ability to resolve personnel issues.
5. Ability to work with multiple situations and handle diverse issues.
6. Able to multi-task in a fast paced environment.
7. Strong telephone and computer skills.
8. Typing speed of 30 WPM or greater.
9. Knowledge of personal computer/keyboard.
10. Knowledge of Microsoft Outlook, Microsoft Word, and Microsoft Excel.

REQUIRED EDUCATION:

High school diploma or G.E.D., some college preferred.

REQUIRED EXPERIENCE:

1. Five years experience in business, customer service or call center operations preferred.
2. Previous experience in supervision required.
3. Worked as a Team Lead or CSR in MTM's CSC preferred.

POSITIONS SUPERVISED:

Team Lead, CSR, Trainer, Public Transit Coordinator/Fax Specialist, Administrative Assistant, Turnback Specialist, CSC Reports Specialist.

TOOLS/EQUIPMENT/MACHINES USED:

Personal Computer, copy machine, fax machine, Cisco phone system

PHYSICAL REQUIREMENTS AND WORKING CONDITIONS:

Normal office conditions. Must have clear, close vision for reading and computer work.

ACKNOWLEDGEMENT:

I have read and understand my position description and certify that I can and will fulfill the stated expectations with without accommodations.

Signature: _____
Employee

Date: _____

Signature: _____
Department Manager/Supervisor

Date: _____

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Original: Human Resources
Cc: Department Director
Employee

<div style="text-align: center;">  <h2 style="margin: 0;">Job Description</h2> <h1 style="margin: 0;">MTM</h1> <p style="margin: 0;">Medical Transportation Management, Inc.</p> </div>		Exempt	
		Non-exempt	X
		Full-time	X
		Part-time	X
		Location	LSL
		Origination Date	9/27/1997
Job Title	Customer Service Representative	Last Revision Date	5*8*06
Department	C1		
Reports to	Team Lead, CSC Supervisor	Page	1 OF 2

POSITION SUMMARY:

The **Customer Service Representative (CSR)** handles incoming ACD calls regarding scheduling of transportation and all other details of customer trips. The CSR is the front line representative of Medical Transportation Management (MTM). Customer Service Representative is an hourly, non-exempt position.

ESSENTIAL JOB FUNCTIONS:

1. Answer incoming ACD calls for customers – passengers, vendors, and clients.
2. Daily scheduling of trips by documenting trip request and selecting the most appropriate vendor.
3. Meet production goal set forth for CSR
4. Meet quality goal set forth for CSR.
5. Utilize correct coding and documentation procedures.
6. Provide prompt response to all trip requests.
7. Report issues, unusual trip circumstances, and efficiency of vendor operations to CSC Team Lead for prompt resolution.
8. Adhere to established client, CSC and MTM protocols.
9. Provide courteous response to all transportation requests and proper use of terminology.
10. Demonstrate sincere personal commitment to promptness, reliability and quality work.
11. Report to work as assigned and on time.
12. Regular attendance required.

MARGINAL JOB FUNCTIONS:

Other duties as assigned.

KNOWLEDGE, SKILLS AND ABILITIES:

1. Typing speed of 30 WPM or greater.
2. Knowledge of personal computer/keyboard.
3. Knowledge of Microsoft Outlook and Microsoft Word.
4. Exemplary communication and phone skills.
5. In-depth knowledge of CSC protocols and procedures.
6. Ability to relate to a diversity of customers and requests.
7. In-depth knowledge of Transportation Provider Network to assure the most appropriate transport.
8. Ability to identify with customer needs and circumstances.
9. Ability to tactfully question and obtain information necessary for the transport.
10. Ability to recognize, handle and refer situations of an emergent nature.

REQUIRED EDUCATION:

High school diploma or G.E.D.

REQUIRED EXPERIENCE:

Call Center experience preferred.

POSITIONS SUPERVISED:

None

TOOLS/EQUIPMENT/MACHINES USED:

Personal computer, copy machine, fax machine, Cisco phone system

PHYSICAL REQUIREMENTS AND WORKING CONDITIONS:

Normal office conditions. Must have clear, close vision for reading and computer work. Job requires sitting at desk the majority of the day.

ACKNOWLEDGEMENT:

I have read and understand my position description and certify that I can and will fulfill the stated expectations with without accommodations.

Signature: _____
Employee

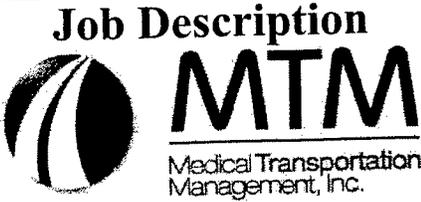
Date: _____

Signature: _____
Department Manager/Supervisor

Date: _____

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Original: Human Resources
Cc: Department Director
Employee

		Exempt	Yes		
		Non-exempt	N/A		
		Full-time	Yes		
		Part-time	N/A		
		Location	Missouri		
		Origination Date	11/12/03		
		Job Title	Manager of Network Management	Last Revision Date	5/15/06
Department	Network Management				
Reports to	Director, Network Management	Page	1	OF	2

POSITION SUMMARY:

The **Manager of Network Management** is a full-time position reporting to the Director of Network Management. The Manager of Network Management is a liaison between Medical Transportation Management (MTM) and the Providers. The primary function of the **Manager of Network Management** is to provide oversight of the Network Management Department.

ESSENTIAL JOB FUNCTIONS:

1. Manage and oversee all aspects of Network Management.
2. Manage the Network Management Provider Education Program.
3. Oversee the Network Management Provider Credentialing Program.
4. Oversee the Network Management internal / external policies.
5. Manage the Provider Discipline Program.
6. Responsible for monthly QMC data.
7. Owner of phone directory.
8. Complete employee paperwork such as: transfers, reviews, discipline, technology requests, change in personal information.
9. Participate in planning, revisions and implementation of MTM Provider Guidelines, Services Agreements and Amendments to Services Agreements.
10. Provide interpretation and assistance in compliance with all MTM policies and reporting procedures.
11. Participate in planning and execution of Regional Provider meetings.
12. Regular attendance required.
13. Reports directly to the Director of Network Management.
14. Direct management of Provider Relations Coordinator and Network Management Representatives.
15. Works closely with Network Management staff.
16. Active member of MTM Performance Review and Provider Discipline Committee.
17. Active member of MTM Management Committee.
18. Works closely with all Providers.
19. Creator, owner and administrator of all Network Management Microsoft Access Databases, which includes all reporting.
20. Ordering and tracking supplies.
21. Managing paid time off (PTO) requests for Network Management staff.

22. Managing time clock for Network Management staff.
23. Mass faxing or mailing of education letters (which includes, but not limited to transportation provider criminal background check and automobile insurance expirations/cancellations) to all transportation providers for all MTM departments, which includes storing of said letters, mailings and fax confirmations electronically.
24. Assist Network Management staff with transportation provider contract negotiations.
25. Conduct employee interviews.
26. Have in-depth knowledge of MTM departments.
27. Provide updates to MTM Protocols.

MARGINAL JOB FUNCTIONS:

1. Other duties as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES

1. Moderate to advanced knowledge of Microsoft applications, including Word, Excel, Access and Power Point.
2. Excellent organizational and interpersonal skills.
3. Demonstrated ability to manage multiple priorities.
4. Ability to multi-task in a fast-paced environment.
5. Ability to handle confidential information in a professional manner.
6. Ability to make solid judgment calls.
7. Previous management experience.
8. Ability to work both independently and as part of a team.
9. Excellent interpersonal skills and ability to work with and manage a variety of people.
10. In-depth knowledge of contracting procedures and processes.
11. In-depth knowledge of MTM operations, systems, Provider Guidelines and other required policies and procedures.
12. Ability to schedule, organize and prioritize multiple tasks.
13. Excellent communication skills, written and verbal.
14. Excellent negotiation and problem solving skills.
15. Strong leadership and analytical skills.
16. Ability to provide information and materials in helpful and meaningful ways to prospective providers.
17. Ability to handle a variety of questions and resolve issues in a constructive manner
18. Superior in ten-key by touch.

REQUIRED EDUCATION:

1. High School Diploma required; college preparation preferred.

REQUIRED EXPERIENCE:

1. Previous experience in working in a supervisory or oversight position preferred.
2. Previous experience in the transportation industry preferred.
3. Knowledge of contracting and negotiations a must.
4. In-depth knowledge of contracting procedures and processes.
5. In-depth knowledge of MTM operations, systems, Provider Guidelines and other required policies and procedures.

POSITIONS SUPERVISED:

1. Network Management Representatives.
2. Provider Recruiters.
3. Provider Relation Coordinator.
4. Translator-MTM Advantage Representative-Provider Relations Coordinator.
5. Public Transit Specialist.
6. Area Liaisons (answer questions relating to NM Access database and/or Services Agreements/Guidelines, assist NM Director when requested).

TOOLS/EQUIPMENT/MACHINES USED:

1. Computer
2. Fax machine
3. Laptop
4. Copy machine
5. Printer
6. Calculator
7. Dolly

PHYSICAL REQUIREMENTS AND WORKING CONDITIONS:

Normal office conditions. Must have clear, close vision for reading and computer work. Must be able to sit, stand, walk, balance, stoop, grasp, talk, hear and operate computer keyboard. Job requires reaching at shoulder level and below waist. Will occasionally lift/pull/push/move up to 100 pounds and carry objects 100 feet.

ACKNOWLEDGMENT:

I have read and understand my position description and certify that I can and will fulfill the stated expectations with without accommodations.

Signature: _____
(Employee)

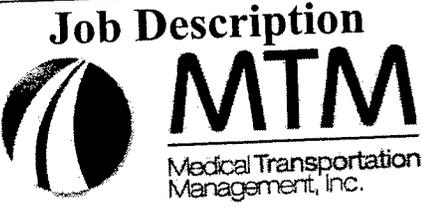
Date: _____

Signature: _____
Department Director/Manager

Date: _____

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Original: Human Resources
Cc: Department Director
Employee

		Exempt	N/A	
		Non-exempt	Yes	
		Full-time	Yes	
		Part-time	N/A	
		Location	Missouri	
		Origination Date	11/12/03	
Job Title	Network Management Representative	Last Revision Date	5/16/06	
Department	Network Management			
Reports to	Manager, Network Management	Page	1	OF 2

Job Summary:

The **Network Management Representative** is a full time position reporting to the Manager of Network Management, MTM, Inc. The primary function is to maintain the MTM provider network by creating good relationships with the providers to assure the highest possible quality of transportation is provided. The **Network Management Representative** is an hourly, non-exempt position.

ESSENTIAL JOB FUNCTIONS:

1. Maintaining providers in the MTM network and making sure the database and their paper and electronic files are kept up-to-date.
2. Assist all Call Centers with provider issues.
3. Notify the proper departments and/or offices of any provider changes.
4. Update the EIC phone system if numbers have been changed.
5. Create, enter and update provider matrices within the computer system (where applicable).
6. Notify the proper departments and/or offices on provider pricing and service area changes.
7. Create all contract amendments for providers.
8. Resolve provider questions and problems.
9. Contact providers to correct faxing errors.
10. De-activate providers within the system for disciplinary reasons.
11. Verify and follow-up that trips set up with de-activated providers have been re-scheduled.
12. Coordinate with MTM's billing department, whenever necessary, to assist provider with billing concerns or problems.
13. Responsible for all contracting details for all providers.
14. Regular attendance required.
15. Reports directly to Manager of Network Management.
16. Works closely with all providers.
17. Works closely with Quality Management, Social Services and all Call Centers.

MARGINAL JOB FUNCTIONS:

1. Other duties as assigned.

KNOWLEDGE, SKILLS, AND ABILITIES:

1. Ability to handle a diverse group of providers and their issues.
2. Ability to handle multiple tasks and situations.
3. Exemplary communication skills.
4. Knowledge of MTM contracting processes.
5. Knowledge of Microsoft systems.

REQUIRED EDUCATION:

1. High School Diploma or G.E.D.

REQUIRED EXPERIENCE:

1. Call center experience preferred.

TOOLS/EQUIPMENT/MACHINES USED:

1. Computer
2. Copy machine
3. Printer
4. Calculator

PHYSICAL REQUIREMENTS AND WORKING CONDITIONS:

Normal office conditions. Must have clear, close vision for reading and computer work. Must be able to sit, stand, walk, balance, stoop, grasp, talk, hear and operate computer keyboard. Job requires reaching at shoulder level and below waist. Will occasionally lift/pull/push up to 20 pounds and carry objects 50 feet.

ACKNOWLEDGMENT:

I have read and understand my position description and certify that I can and will fulfill the stated expectations with _____ without accommodations.

Signature: _____
Employee

Date: _____

Signature: _____
Department Director/Manager

Date: _____

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Original: Human Resources
Cc: Department Director
Employee