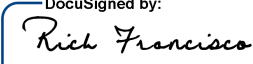




Policy/Procedure Title: Agency Standards of Customer Service	Policy and Procedure #: 11-005	<u>Review Dates</u>	
Category: Community Relations Subject: To ensure the experience of all individuals seeking services from HealthWest feel welcome, safe, comfortable and informed through the use of effective and efficient customer service operations, a well-established agency standard of service, and maintenance of professional image and demeanor to benefit individuals receiving HealthWest services, providers, employees, and community members.	Prepared by: Name: Gary Ridley Title: Communications and Training Manager Approved by: DocuSigned by:  AA7EBD48ABB04A3 Rich Francisco, Executive Director	01/21/2026	
		05/06/2026	
	Effective Date: 04/05/06	Last Revised Date: 04/08/2024	

I. POLICY:

HealthWest will provide a method for responding to service inquiries, system, or general information requests, grievances, concerns and/or inquiries from individuals seeking services.

II. APPLICATION:

This policy and procedure is applicable to all employees of and individuals served by HealthWest.

III. DEFINITIONS:

- A. Customer: Used broadly in the HealthWest system to describe a variety of stakeholders, including former, current, and potential persons served and their families; HealthWest staff; vendors; community partners; and network providers.
- B. Adverse Benefit Determination: A decision that adversely impacts a Medicaid beneficiary's claim for services.
- C. Appeal: A review of an adverse benefit determination.
- D. Beneficiary: An individual who is eligible for and enrolled in the Medicaid program.
- E. State Fair Hearing: A state level review of beneficiaries' disagreements with CMHSP, or PIHP denial, reduction, suspension or termination of Medicaid services. State administrative law judges who are independent of the Michigan Department of Health and Human Services perform the reviews.
- F. Grievance: Expression of dissatisfaction about any matter other than an adverse benefit determination. Grievances may include, but are not limited to, the quality of care or services provided, and aspects of interpersonal relationships such as rudeness of a provider or employee, or failure to respect beneficiary's rights regardless of whether

remedial action is requested. Grievance includes a beneficiary's right to dispute an extension of time proposed by the PIHP to make an authorization decision.

- G. Inquiry: A contact made to Customer Services at LRE or CMHSP by a consumer, guardian, family member or friend, provider, HealthWest staff, or anyone in the community seeking information and/or assistance. Inquiries can include, but are not limited to, requests for information about benefits, services, providers, and available community resources.
- H. Recipient Rights Complaint: Written or verbal statement by a consumer, or anyone acting on behalf of the consumer, alleging a violation of a Michigan Mental Health Code protected right cited in Chapter 7, which is resolved through the processes established in Chapter 7A.
- I. A Notice of Adverse Benefit Determination: this is the document that informs the individual of the service(s) that are impacted along with an explanation of their rights and recourse.

IV. PROCEDURE:

- A. Customer Services shall be a designated unit at HealthWest with the following functions:
 - 1. Welcome and orient individuals to HealthWest services, benefits available, and the provider network.
 - 2. Provide information about how to access mental health, primary health, and other community services. All materials will be presented in a format and method that is understandable by each individual.
 - 3. Provide information about how to access the various customer service-related rights per the contract with MDHHS and the Recipient Rights processes. All materials will be presented in a format and method that is understandable by each individual.
 - 4. Help individuals with problems and inquiries regarding Medicaid and non-Medicaid services & related service benefits.
 - 5. Have access to information about the agency, including the Annual Report, current organizational chart, Board member list, meeting schedule and minutes, etc., and provide this information in a timely manner to individuals upon their request. This information, excluding the organizational chart, is on the website but should be downloaded by staff and provided to individuals who do not have access or the skills to access the internet.
 - 6. Assist individuals, upon request, with resolving concerns and complaints and with filing grievances and appeals, accessing the local dispute resolution processes, and coordinating with the Lakeshore Regional Entity, designated Fair Hearing Officers and the local Office of Recipient Rights, as appropriate and needed. Individuals that reach out to customer service with a concern, complaint, grievance or a request for an appeal will be free from retaliation or discrimination.
 - 7. Collaborate with other departments at HealthWest, particularly the Quality Improvement department and the Diversity, Equity and Inclusion Department, to

respond to feedback from persons served and implement changes to address customer services issues, potential gaps in service, and to ensure a high quality of care. This will include collecting data in order to identify trends in service-related concerns as well as positive outcomes related to services.

8. To the extent possible, customer services staff will support individuals receiving CCBHC (Certified Community Behavioral Health Clinic) services with navigating the appeal process with private insurers.

9. Telephone Call Recording

- a. HealthWest may record telephone calls received through the General Information Line (231-724-1111) for the purposes of quality assurance, training and coaching, complaint review, and compliance review. Telephone call recording shall not occur on the Warm Line or on telephone lines used by individuals to connect with members of their treatment team.

- b. Individuals calling the General Information Line shall be informed at the beginning of the call that the call may be recorded. This will be accomplished via recording prior to staff answering the line.

- c. HealthWest shall obtain acknowledgment from employees that calls on designated lines may be recorded and reviewed for authorized business purposes. Employees assigned to a recorded line shall review the policy 11-005 Agency Standards of Customer Service policy and related agency requirements prior to utilizing the recorded line.

- e. Call recordings shall be maintained for short-term quality review purposes and shall be automatically deleted within ninety (90) days unless otherwise required by this policy or applicable law.

- f. If a call recording becomes part of a Recipient Rights investigation, grievance review, personnel disciplinary matter, clinical record, or litigation matter, the recording shall be retained in accordance with the retention schedule and requirements applicable to that record type.

- g. Automatic deletion shall be suspended when a recording becomes part of a patient medical record or is subject to a pending Freedom of Information Act request, grievance, audit, investigation, or litigation hold. The recording shall be retained until the matter has been resolved and all applicable retention requirements have been satisfied.

- h. Call recordings shall be stored and transmitted securely in accordance with applicable HIPAA administrative, technical, and physical safeguard requirements. Access to call recordings shall be restricted to authorized personnel with a legitimate business need. HealthWest shall maintain audit

controls to monitor access to recordings and to assist in preventing and detecting unauthorized access.

i. Call recordings may constitute public records and may be subject to disclosure in accordance with the Michigan Freedom of Information Act. Certain recordings or portions of recordings may be exempt from disclosure pursuant to applicable provisions of law.

B. HealthWest staff shall be trained to welcome people into the public behavioral health system and to possess current working knowledge, or know where detailed information can be obtained, in at least the following areas:

1. The populations served (mental illness, serious emotional disturbance, developmental disability, and substance use disorder), and eligibility criteria for various benefit plans (e.g., Medicaid, Adult Benefit Waiver, MI Child, etc.).
2. Service array (including substance use disorder treatment services), medical necessity requirements, and eligibility for and referral to specialty services which is contained within the Service and Provider Guide
3. Person-Centered Planning.
4. Self-Determination.
5. Recovery and Resiliency.
6. Peer Support Specialists.
7. Grievance and appeals, Fair Hearings, and local dispute resolution processes (Policy 04-023), and Recipient Rights processes (04-022).
8. Available accommodations.
9. Limited English Proficiency.
10. Diversity, equity, and inclusion/Cultural competency.
11. General information and referral information related to Medicaid-covered services within the PIHP as well as outside to Medicaid Health Plans, Fee-for-Service practitioners and the Michigan Department of Health and Human Services.
12. The organization of the Public Mental Health system.
13. Balanced Budget Act requirements relative to the customer services function and member rights and protections.
14. Community resources (e.g., advocacy organizations, housing options, schools, public health agencies).
15. Michigan Public Health Code.

C. Staff Identification

1. All HealthWest employees will wear prominently displayed, agency issued, identification that includes a professional picture, first name, last name, and preferred pronouns. These will be worn while in HealthWest buildings and while conducting business on behalf of HealthWest.
2. The identification will not be obscured by jackets, vests, jewelry, or any similar item. Supervisors may excuse an employee from wearing identification when staff or consumer safety might be compromised or in places where customers might object to being accompanied by an identified HealthWest staff.
3. If the badge is lost or stolen, it will be reported to Human Resources staff as soon as possible to be replaced. When an employee terminates employment with HealthWest, the identification badge will be relinquished.

D. Appropriate Professional Attire

1. The dress code of HealthWest is best described as **"Business Smart"**. While performing their work duties, staff are to present a clean and neat appearance. HealthWest implements [Business Smart Dress Code Guidelines](#) and expects respectfulness, thoughtfulness, and good judgment regarding one's appearance.
2. Staff should strive to ensure that their appearance is never offensive to co-workers or those we serve, and to exercise cultural sensitivity and understanding.
3. This HealthWest Dress Code Policy is purposely vague yet holds each individual responsible to **use good judgment**. Since there are wide variances in job duties, unit supervisors have the authority to create specific dress standards for their units.
4. Unit supervisors will address any concerns about individual staff appearance with that staff member. Employees who report for work with what is deemed to be a questionable appearance will be asked to return home to make an appropriate change in their attire.

E. Digital Professionalism

- a. When participating in video conferencing, HealthWest staff will maintain a level of professionalism that includes adherence to the agency dress code policy and proper use of identification as described below.
- b. When using video conferencing technology such as Microsoft Teams or Zoom, HealthWest staff will use their preferred first name and legal last name as well as use an agency issued professional headshot photo.
- c. Video conferencing backgrounds should be neat, tidy, and presentable. HealthWest staff may use their natural background, a blurred background or an appropriate virtual background.

- d. Display of preferred pronouns is strongly encouraged when using video conferencing technology.
- e. HealthWest staff will maintain a professional email appearance with use of a standardized email signature. Emails sent from healthwest.net email addresses may not include embellishments such as background images or page colors. Emails should be formatted to meet or exceed WCAG 2.1 standards with a high contrast white background and black type recommended. Signature lines should include the staff name, title, phone number(s), and the HealthWest logo. The addition of email address and fax number is also acceptable. Staff are encouraged to use their preferred pronouns in their signature line. Any changes to the standard email signature must be approved by a HealthWest supervisor or manager. Images other than the HealthWest logo should not be used unless approved by the Customer Service/Community Relations Department. Quotes and other information should not be included in the signature line unless approved by the Customer Service department.

F. Demeanor and Attitude

HealthWest employees will, at all times, demonstrate a cooperative and respectful attitude. Interactions with individuals in services, family members, colleagues, and community members will meet or exceed the “welcoming and customer satisfaction” standard as described in the Code of Ethics, Values Statement and Guiding Behaviors, and the agency Cultural Competency Plan.

V. REFERENCES:

Policy No. 04-022 Complaint Process and Appeals Process
Policy No. 04-023 Grievances and Dispute Resolution
Policy No. 11-006 Assuring Appropriate Accommodations
MDHHS Contract Attachment P.6.3.1 – Customer Services Standards
MDHHS Grievance and Appeal Technical Requirement/PIHP Grievance System for Medicaid Beneficiaries, P.6.3.1.1.
Michigan Mental Health Code, Chapter 7A
42 CFR 438.10
Michigan Freedom of Information Act (Public Act 442 of 1976, as amended)
HealthWest Record Retention Schedule
Health Insurance Portability and Accountability Act (HIPAA)

Authors Initials GR/hb