> medefy

Ditch the dark ages. Leave the bots behind.

Here's how we do it, step-by-step:

Go mobile
Give your people instant access wherever they are
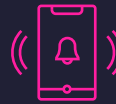
Centralize
Put all your benefits in one easy-to-access place

Navigate
Find care with on-demand expert guidance

Remind
Regular reminders keep your people on track

A hub with hustle.

And the front door to your entire health benefits plan. Easy-to-access, easy-to-use features in one place – made for real-time, high-value decision making.

Real, human, and expert Care Guides

Appointment assistance & referral coordination

Benefits cards at the ready

Deductible & out-of-pocket accumulators

Medical bill review

Plan documents & open enrollment materials

Notifications, incentives, tools, plan education

Campaigns for strategic initiatives

Secure & HIPAA compliant

Vendor Integration

✓ Dental
✓ Vision
✓ Telemedicine
✓ EAP
✓ PBM
✓ Applicable $0 network
✓ Onsite / near-site providers
✓ Additional benefits
✓ More

The Untouchable BOR - yep, we're making that a thing.

Because clients don't shop results. Superhuman benefits navigation for benefit advisors that like loyal clients and new opportunities.

Bot-free benefits navigation with live, human benefits experts at the heart of it all.

✓ Centralized benefits navigation

Launch and layer high-performance plan strategies without adding barriers of complexity. With Medefy, plan members get a one-stop-shop for all things benefits.
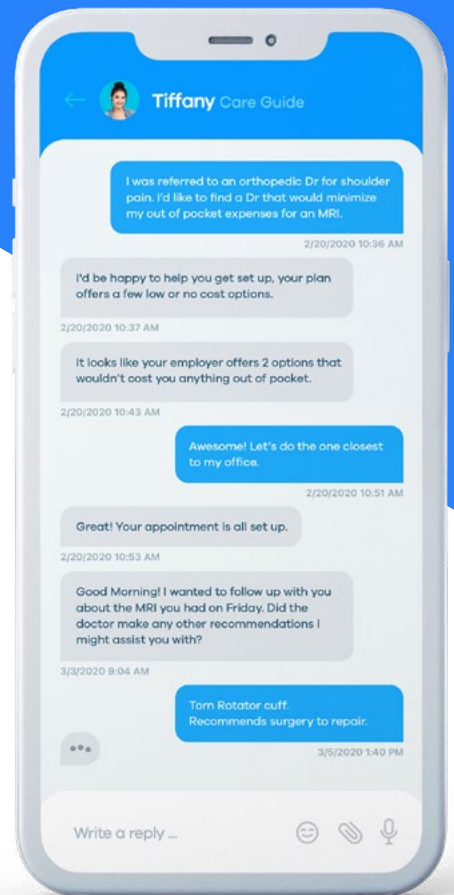
✓ Live, human benefits experts, 24/7

Plan members can connect in real-time with a Care Guide, 24/7 for in-the-moment guidance to the highest-value, lowest-cost care available to them.

✓ Tangible results

Demonstrate verifiable expertise when plan members easily embrace the plan strategies you've put in place. Build your business while helping your clients improve theirs.

- Turnkey implementation
- 45-second average initial response time
- Proactive communication
- On-demand care team
- Simple or complex plan designs

Tiffany Care Guide

I was referred to an orthopedic Dr for shoulder pain. I'd like to find a Dr that would minimize my out of pocket expenses for an MRI.

2/20/2020 10:36 AM

I'd be happy to help you get set up, your plan offers a few low or no cost options.

2/20/2020 10:37 AM

It looks like your employer offers 2 options that wouldn't cost you anything out of pocket.

2/20/2020 10:43 AM

Awesome! Let's do the one closest to my office.

2/20/2020 10:51 AM

Great! Your appointment is all set up.

2/20/2020 10:53 AM

Good Morning! I wanted to follow up with you about the MRI you had on Friday. Did the doctor make any other recommendations I might assist you with?

3/3/2020 9:04 AM

Torn Rotator cuff. Recommends surgery to repair.

3/5/2020 1:40 PM

Write a reply ...

84%

OF EMPLOYERS INQUIRED ABOUT BENEFITS NAVIGATION PLATFORMS IN 2020

"No other benefit has been received so well by our staff!"

– Lacie Beloncik, Benefits Specialist

A benefits navigateway.

medefy

medefy

On demand, from one dash.

Because waiting rooms and out-of-network, overpriced care are not ideal. With Medefy, get virtual urgent care a tap away, 24/7. And all of the moving pieces of your team's health benefits plan in one, tidy, easily-accessible hub.

I'm thinking about running to urgent care.

I can help you right here.

Responsive, real-time urgent care.

We're talking less-than-10-minute response times. That's right – at any time, from anywhere. All you need is internet access to get connected with quality care that saves them – and the health benefits plan – time and money.

Features for the win
From video chats and messaging to treatment plans and medical records, our features make it easy for members to have the full cycle of care right at their fingertips.

Security and simplicity
We keep things on lock, HIPAA style. All medical records are securely stored, and video interaction, messaging, email, and in-app communication is easy to use and equally secure.

Top-tier physicians
All of our physicians are not only trained at top medical centers across the country, but are board certified and licensed to practice in accordance with local laws and regulations as well.

Robust reporting
Options are important. Especially when you have big strategy plans in the works. Get metrics by member or subgroups – on everything from utilization to top prescriptions.

Patient Conditions

Common Issues	Ear, Nose, Throat	Digestive	Respiratory	Skin
✓ Fever	✓ Allergies	✓ Nausea	✓ Cough	✓ Heat/Chemical Burns
✓ Flu	✓ Eye Infections	✓ Vomiting	✓ Congestion	✓ Athlete's Foot
✓ Migraines	✓ Ear Pain & Infections	✓ Upset Stomach	✓ Bronchitis	✓ Itchy Skin
✓ Rashes	✓ Sore Throat			✓ Fungal Infections
✓ Urinary Tract Infections	✓ Sinus Infections			✓ Wound Infections
	✓ Runny Nose			

In-the-moment mental health.

Make making time for mental health easier – anywhere, any time. With Medefy, members can connect with some of the best mental and behavioral health providers around the country, 24/7. Patient treatment plans, communication, and all the moving pieces of your health benefits plan are just a tap away.

Talk about robust.

From features to our expansive network of providers, members can count on robust options – without complexity. The fastest way to have members neglect needed care? Make the process hard to navigate. We aren't about that. We give members flexibility and simplicity – so they can choose exactly the services they need – in a snap.

Top-tier providers

Members can choose from a variety of providers – from board certified physicians who can prescribe, to counselors and coaches that support a wide range of mental health needs.

Secure from all angles

Patient protection is always a top priority. HIPAA standards guide everything from video interactions and messaging to email, in-app notifications, and medical records.

Data done right

Get reporting that helps you achieve those big strategy plans – and makes an impact. We provide insights on utilization by member or subgroup, even top medications prescribed.

24/7 Access straight from the app

Immediate help from a Certified Mental Health Support Coach

Phone and video support

Coaching to address acute and self-limited concerns

Notes and treatment plans

Real-time reports and dashboards

Consolidated medical records

Fitness and wellness tools

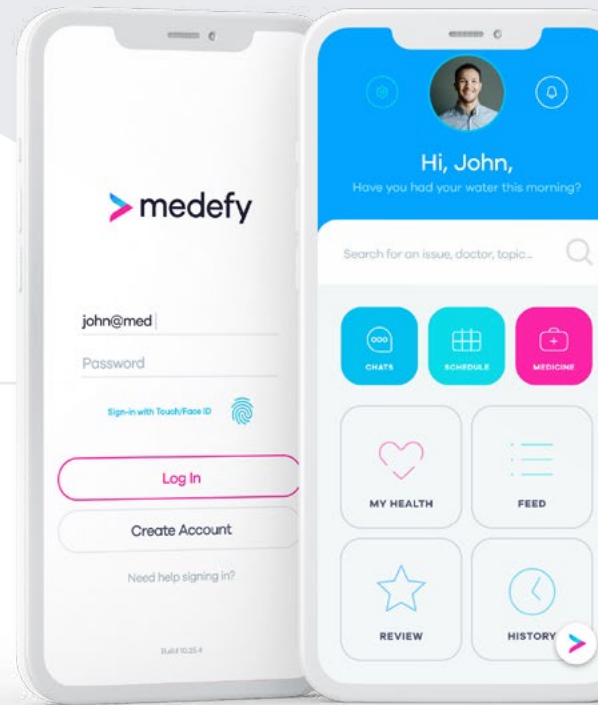Physician support for clients requiring higher levels of service

Self-guided programs for anxiety, stress, depression and more

Hi, HR leaders.

Your life is about to get a whole lot easier.

Medefy is here to make it happen. Here's what comes next.

✓ Get to Know You

All about you – and that health plan. It's best for us to have the full picture of what you offer. We'll take the time to uncover all the right details and data, so our team can get you properly set up for success.

✓ Forms & Formalities

Not as taxing as it sounds, promise. Our Customer Success crew will reach out with a quick set of forms to complete – and they'll even walk you through it. This will ensure we have all proper contacts for your team's onboarding and all necessary information associated with your benefits plan offerings.

✓ Let's Kick This Off

And get all the right people together to talk about your tailored Medefy experience. We'll schedule a call to run through the ins and outs of the onboarding process for your team, cover insights, and get the ball rolling on customizing your team's app experience.

✓ App & Engagement Prep

To start making your life easier – and your members happier. We'll get to work on tailoring the app to your unique benefits plan, creating a cohesive benefits navigation experience regardless of how many third party vendors you have.

✓ Polish & Perfect It

And get it working seamlessly with accurate data and all the bells and whistles. This is when we'll get your feedback as well, and make improvements. At the same time, we'll also get our Care Guides well-versed in your company's plan and ready to help your members with ease.

✓ Launch It

And promote the heck out of it. For optimal engagement, we'll provide consistent, pointed messaging to your members once per week, and create a variety of promotional communication materials.

A benefits navigateway.

- No heavy-lifting onboarding process
- Dedicated Customer Success team
- HIPAA compliant, data encryption

"We can't wait to help you provide the best health benefits member experience ever!"

Sarah Tingler, Customer Success Team Leader

> medefy

medefy

$0 Office visits, without the waiting room.

Because waiting rooms, out-of-network, and overpriced care is not ideal. With Medefy, virtual care is just a tap away, 24/7. Medefy centralizes all the moving pieces of your health benefits plan into one tidy, easy-to-use app.

I'm thinking about running to urgent care.

I can help you right here.

Responsive, real-time virtual care.

We're talking less-than-10-minute response times. That's right – at any time, from anywhere. All you need is internet access to get connected with quality care that saves you time and money. With the Medefy app, the care you need is just a tap away.

Features for the win

From video chats and messaging to treatment plans and medical records, our features make it easy for you to have the full cycle of care right at your fingertips.

Security and simplicity

We keep things on lock, HIPAA style. All your medical records are securely stored, and video interaction, messaging, email, and in-app communication is easy to use and equally secure.

Top-tier physicians

All of our physicians are trained at top medical centers across the country, board certified, and licensed to practice in accordance with local laws and regulations.

Flawless follow-through

If medically necessary, a prescription can be sent to your preferrred pharmacy. Medefy Care Guides are also available 24/7 to help you find the best options if an in-person appointment is needed.

Common Patient Conditions

Common Issues	Ear, Nose, Throat	Digestive	Respiratory	Skin
✔ Fever	✔ Allergies	✔ Nausea	✔ Cough	✔ Heat/Chemical Burns
✔ Flu	✔ Eye Infections	✔ Vomiting	✔ Congestion	✔ Athlete's Foot
✔ Migraines	✔ Ear Pain & Infections	✔ Upset Stomach	✔ Bronchitis	✔ Itchy Skin
✔ Rashes	✔ Sore Throat			✔ Fungal Infections
✔ Urinary Tract Infections	✔ Sinus Infections			✔ Wound Infections
	✔ Runny Nose			

Scan to download the app in the Apple Store or Google Play

![medefy | MediOrbis]

$0 virtual mental health

Benefits navigation, meets personalized virtual care.
We'll be here all day, literally.

Accessible

Mental health counselors that meet you where you are at, 24/7, all in one simple, easy-to-use app.
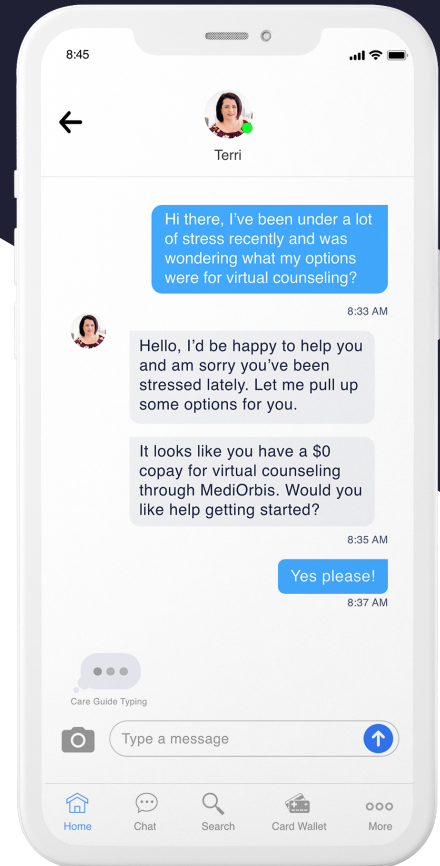
Confidential

We keep things on lock, HIPAA style. Your medical records, video interaction, and in-app messages are all securely stored.
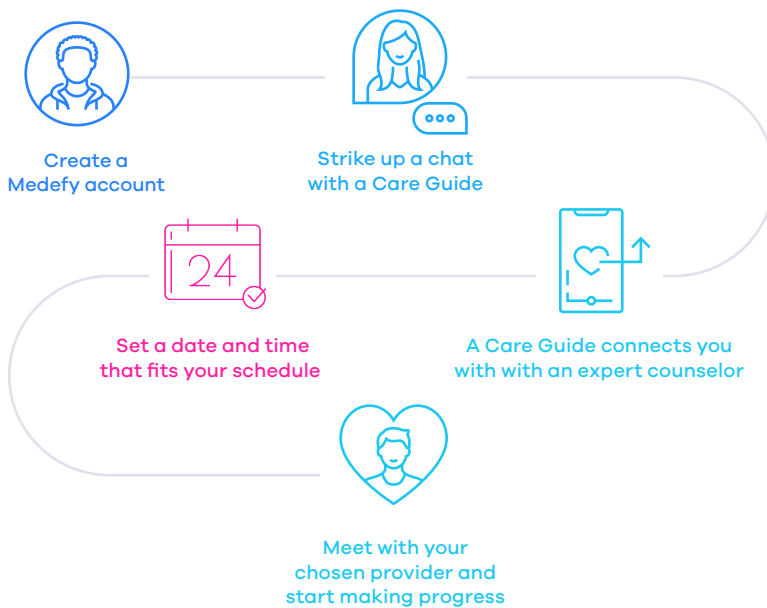
Convenient

Round-the-clock support from real human, experts – Care Guides for health plan navigation, and a dedicated health care team.

Phone chat interface:

Terri

Hi there, I've been under a lot of stress recently and was wondering what my options were for virtual counseling?
8:33 AM

Hello, I'd be happy to help you and am sorry you've been stressed lately. Let me pull up some options for you.

It looks like you have a $0 copay for virtual counseling through MediOrbis. Would you like help getting started?
8:35 AM

Yes please!
8:37 AM

Care Guide Typing

Type a message

Home   Chat   Search   Card Wallet   More

Access real-time virtual counseling in a few simple steps.

Create a Medefy account

Strike up a chat with a Care Guide

Set a date and time that fits your schedule

A Care Guide connects you with with an expert counselor

Meet with your chosen provider and start making progress

What our online counselors can help you with:

Without the telemedicine guessing game and benefits navigation maze. A one-stop-shop to clarity and care.

✓ Stress

✓ Anxiety

✓ Depression

✓ Mood swings

✓ Trauma and PTSD

✓ Negative thought patterns

✓ Relationship conflicts

✓ Marriage issues

Scan to download the app in the Apple Store or Google Play

medefy

We handle the heavy lifting.

Most onboarding comes with a headache. Mountains of paperwork. Relentless meetings. Endless analyzing. More work than it's worth. Surprise – it doesn't have to.
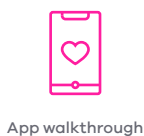
Quick and clear.

From contract, we're talking a couple quick and easy forms and a kickoff – and it's off to the races. Without drowning you in process.

Zero taxing meetings required.

Refreshingly simple, straightforward and streamlined.

Our End

- Intake contact & implementation forms
- Host kickoff call
- Coordinate BAA with medical, dental & vision carriers
- Intake plan question responses
- Prepare app & engagement materials
- Coordinate final eligibility data with medical, dental & vision carriers
- Provide DNS records
- Present engagement review
- Train Care Guides and Referral Coordinators
- Perfect client platform based on engagement review
- App walkthrough
- Promote & launch app

Your End

Contact & implementation forms

Kickoff call

Whitelist email domain

Plan questions response

Engagement review

App walkthrough

medefy

We take security seriously.

Protecting our people is #1 – that's why we invest in industry-leading security protocols and processes, including our SOC 2® certification.

Keeping things on lock.

When it comes to the levels of security we take, we're a bit extra.

From infrastructure that's protected behind firewalls with strict traffic rules and intrusion detection, to a facility that is under 24/7 camera surveillance with additional physical protections – we're set up for maximum security. With SOC-2 compliance, we're committed to meeting all five trust categories of security: confidentiality, processing, integrity, availability, and privacy.

Leading tech with leading protocols.

If your product is leading, your security should, too.

AICPA
SOC
aicpa.org/soc4so
SOC for Service Organizations Service Organizations
™

Physically and electronically secured server environment

All app data encrypted in transit via HTTPs through an SSL certificate

All data at rest is encrypted through AES 256-bit encryption

Biometric authentication for added app login security

Transport Layer Security (TLS) technology to protect all in-app data communication

HIPAA compliant and TRUE Digital Security partner for strictest security standards

medefy

Data that does double-time.

That needle? Watch Medefy move it. With dynamic reporting that actually makes an impact on your strategy and bottom line.

Touchpoints that tell all.

From Care Guide interactions to productivity and redirection savings, you'll have a pulse on just how far your extending HR's reach with Medefy in your back pocket.

And with easy-to-navigate features, you'll see exactly where engagement thrives – and where it needs a boost (we can help there, too).

Redirection & Referrals
Costly out-of-network and emergency claims? Let's get that under control. See exactly how often (and for what procedures) Care Guides redirect your people to lower-cost, high-quality care.

Adoption and Utilization
Get a good look at where your plan is headed. Adoption stats, check. Usage frequency, check. Member activity and reviews - check, check.

Chat
Be in-the-know on how often your team members make the most of 24/7, live Care Guide help – when they initiate a chat and why.

Savings
See that plan strategy in action with an at-a-glance view of savings by procedure and category.

Usage Breakdown
Get quick insight into your team's total downloads, logins, overall engagement – and how they rate and review their experience.
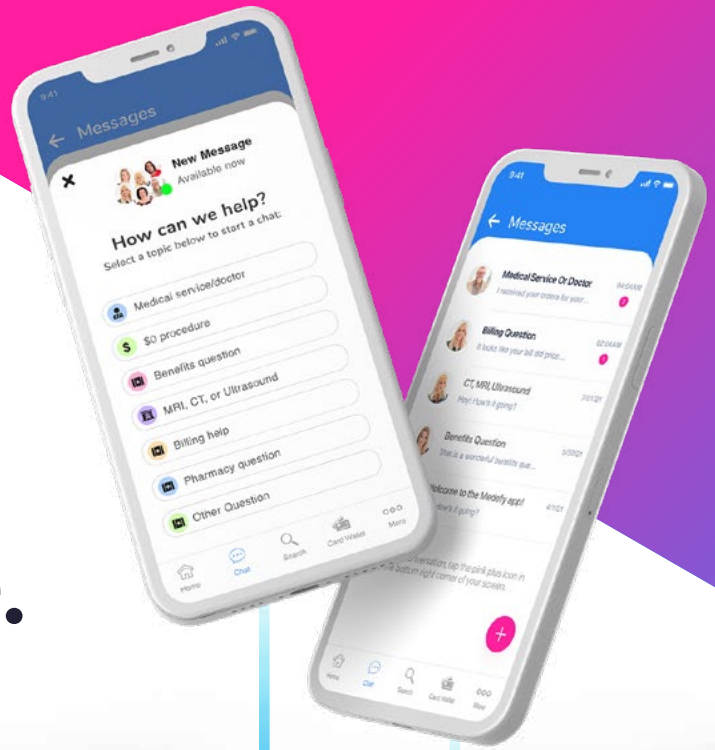
↑**25**% Total app downloads

Chats
Members who contacted a Care Guide
Total
Monthly Avg

User ratings
★★★★⯪
4.4 out of 5

Estimated Savings
$$$$$ total savings
$$$$$ productivity savings

Referrals
to high-value care
Total
Monthly Avg

medefy

Break through, baby.

Steps, that is. Small actions lead to big results. With Medefy, create buy-in for the big picture, and get plan members engaged in making small care decisions that lead to long-term tide changes.

Build success momentum – with incentives.

Let's get your plan members making care choices like educated consumers, even though they may not be. Incentives help plan members associate success with behaviors you want them to take – like getting preventive care, choosing preferred/pre-negotiated providers, or creating a primary care relationship(instead 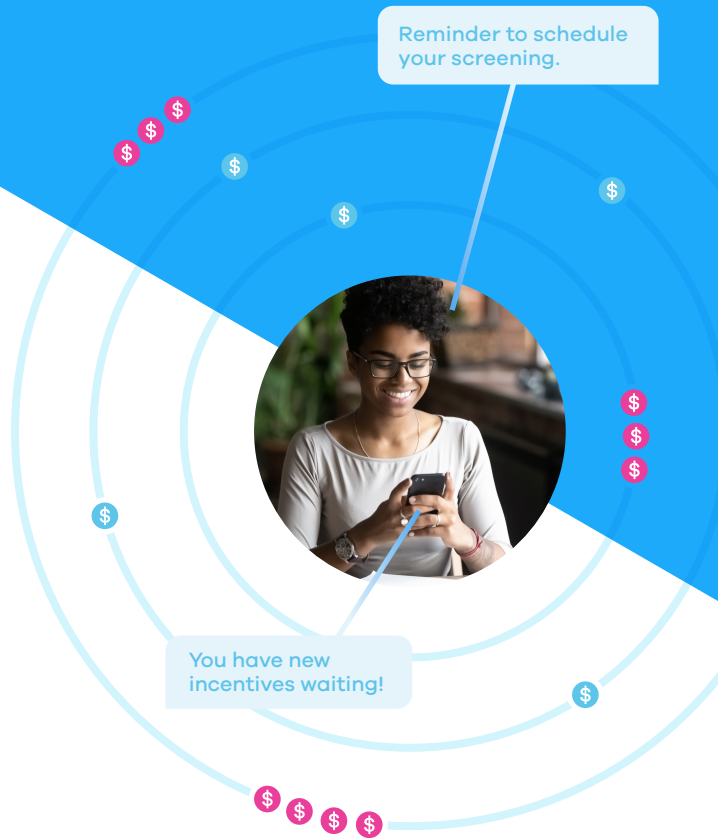of hitting the ER when things come up). Easy action steps that mean member savings and rewards? That's a win-win for them – and the plan.

Keep it simple, structure

Less is more – we don't overcomplicate it. We create a straightforward, simple structure that makes taking action easy. Then, we reach plan members where they are, with bite-sized communication and rewards that stimulate the care action step.

Tailored to your plan

Time to get creative. We work with you to build a program that complements your plan design, motivates the right behaviors, and aligns with strategic initiatives. Whether it's $10 toget a skin screening, or $500 to choose a preferred surgery provider, the rewards align with the areas you want to see impact.

Say hello to scaleable

From easy, quantified motivators that stimulate small, but necessary, action that leads to continuous engagement and a bigger plan impact – to bigger motivators that have a direct and quicker impact for larger scale care needs.

Activity Before & After Incentives
Compare Medefy incentives to regular engagement

INCENTIVES LAUNCH

Transparency? Let's do this thing.

Deep breaths, everyone. Let's get right to it. By July 1, 2022 group plans and issuers must make pricing for items and services within the health benefits plan available to enrolled plan members.

The legislative lowdown.

Let's back up a little. You might remember the Transparency in Coverage Rule going into effect January 11, 2021. Surprise, it's time to roll into the next three phases happening now through 2024.

In simple terms: the goal is to allow plan members to shop rates on healthcare services before they get care.

In a little less simple terms: Possible consumer confusion on value and price association.

What this means for group plans and issuers? You want price transparency to lead to the right outcomes. It's time to create some tools to help your members see what items and services cost – and up that member education game. Thankfully, we have that latter part covered with on-demand, in-app, expert guidance that gets results.

No, really. And as you navigate the new legislation, we'll help your people navigate to care – keeping decision making simple and smart.

$300
Savings per interaction

94%
High-value steerage

45s
Average initial response time

The need.

Here's what you need to provide.

- **In-Network Rate File**
  Rates for all covered items and services between the plan or issuer and in-network providers.

- **Allowed Amount File**
  Allowed amounts for, and billed charges from, out-of-network providers.

- **Specific Service & Specific Provider**
  An internet-based price comparison tool confined to a list of 500 items and services.

- **All Services from Specific Provider(s)**
  An internet-based price comparison tool for ALL items and services offered by the plan.

The timeline.

Non-compliance means $100/person, per day. We don't want that, and neither do you.

July 1, 2022

All group plans and issuers (plans beginning on or after 1/1/22) must produce and make standardized files of pricing info available.

- ✓ Negotiated rates for covered items and services
- ✓ Historically allowed amounts and billed charges for out-of-network providers
- ✓ In-network rates and historical allowables for all covered prescription drugs

Jan. 1, 2023

All group plans and issuers must provide plan participants with access to a web-based, personalized, self-service price transparency search tool that covers 500 items and services selected by regulators.

Jan. 1, 2024

The tool must support searches for all items and services.

The takeaway.

Consumers often associate a higher price with a higher value.

The truth is – transparency won't always lead to the right outcomes. And transparency tools alone may not be enough.

Things can improve, though, when members have someone in their corner – like a 24/7 Care Guide offering quick, compassionate, real-time help. Pairing real, human guidance with the right transparency tools can help you drive members to high-quality, low-cost care. And that's when doors open to real change.

How ya doing?

Doing great :)
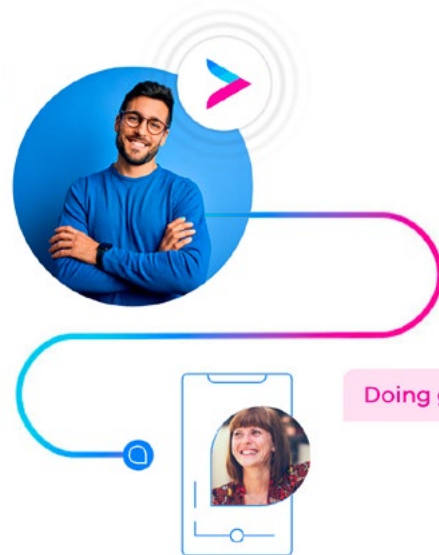
Without modern benefits navigation, robust benefit plans can be hard to understand.

65%
of employees struggle to navigate the healthcare system.

70%
of employees feel they don't have what they need to understand their healthcare.

We give employers heart eyes.

With a member experience that goes beyond open enrollment — way beyond. No heavy lifting required.

Anything but average.

An average employer communicates health plan benefits 1 time per year. Engagement that works smarter? 3.5 times per month.

We embrace the Stanford University-backed Fogg Behavior Model for needle-moving member communication. The three key elements: Motivation, Ability, and Trigger, guide our member engagement communication pathways.

Education, in rhythm. Regularly.

Tailored, bite-sized communication helps you guide – and increase engagement.

No educated consumers required. No jargon overload. Understood in ~3 seconds. Clear value. Easy action steps.

Custom campaigns
Meet member needs and drive bottom lines through digital and physical channels – like with a reach-the-spouse campaign or service-focused enrollment incentive

Push notifications
And SMS messages, too. On-the-go, in-the-moment campaigns to remind, incentivize, and provide tools

Email
Well-designed and well-deployed to educate and drive usage

Print
Customized direct mail to help reach target audiences
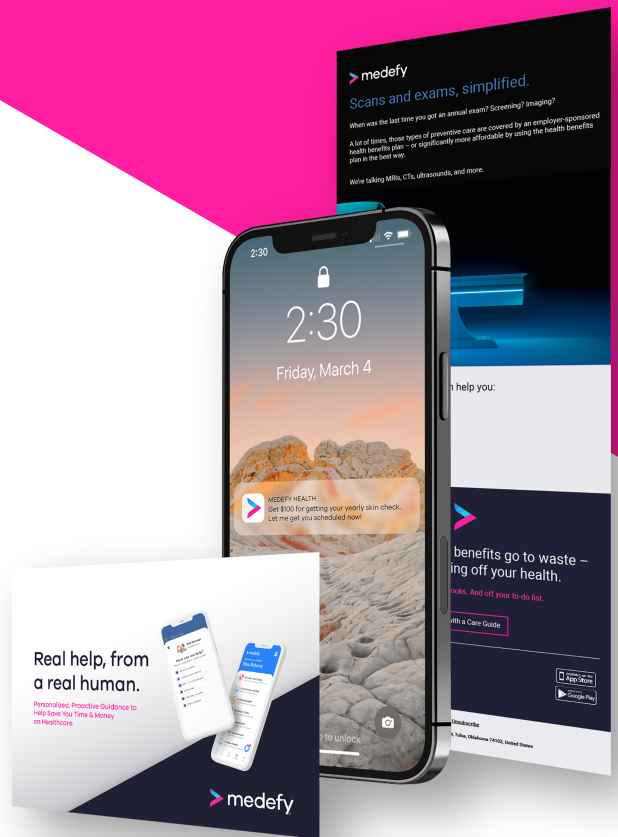
Follow-through, flawlessly.

You don't have to tell us that consistency is key. Our Care Guides stay in communication with members, from navigating to care and checking in after services to next steps.

★★★★★
Average satisfaction

+50%
Engagement rate

1-4x
Return on investment

3.5x
Plan benefits communication per month

Your people will love you for this.

Unlock the vast potential of your benefits program by empowering the people within it.

Superhuman benefits navigation for strategic employers and modern employees.

✓ One place for all things benefits

Centralize all employee health benefits in one simple app. Plan members can quickly and easily access benefits information, get answers, and navigate to care – even if they've forgotten everything during open enrollment.

✓ In-the-moment guidance

Plan members can connect in real-time with live, human Care Guides for their unique benefit-plan. With a 45-second average initial response time, they'll get clear guidance to the highest value, lowest-cost care available to them.

✓ No-nonsense results

Employers with high-performing health plans know the value of an excellent member experience. Teams with Medefy enjoy at least 4x ROI, 50% engagement, and reduced HR workload. Members get a suite of tools and experts that remove the complexities of using their benefits effectively.

- Simple to launch
- Proactive communication
- 24/7 live Care Guides
- Simple or complex plan designs
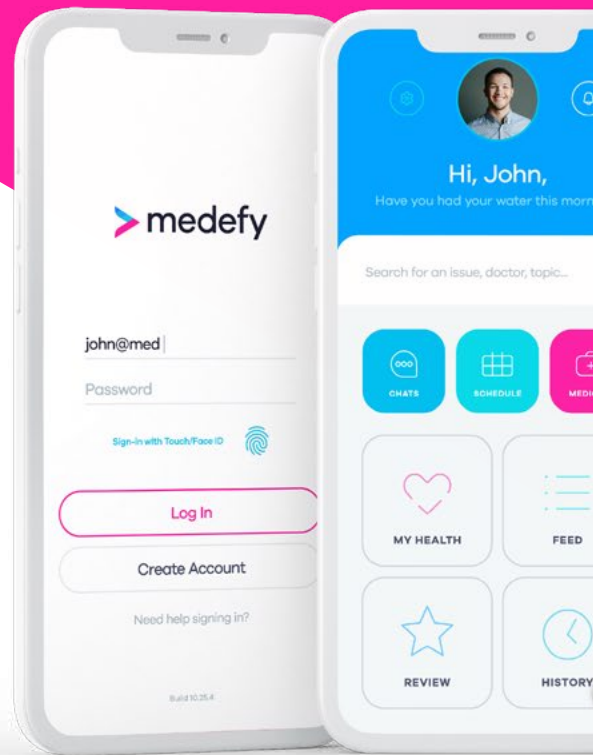
$300

AVERAGE SAVINGS FOR EACH INTERACTION WITH A CARE GUIDE

"Years of not getting help with my benefits and now I can just send a text and get a quick response!"

- J.L., American Waste Co.

A benefits navigateway.

> medefy

Superhuman benefits navigation.

A member-first experience that employees, employers, and HR leaders can't get enough of.

Tulsa, OK
A desire to uncomplicate access to health benefits since 2013.

Medefy is a healthcare app that provides employers with the unique ability to directly guide and navigate their employees to make high-quality, low-cost, individualized care decisions in real time. The platform allows employees to take advantage of all the offerings of modern, robust health benefits plans with live, human help.

A team ready to drive transformation.

The Medefy platform began as a tool for employers to offer to their teams that allowed employees to shop for better-priced, higher-quality providers close to home. Eliminating the common education gap for robust plans and members? Check.

Medefy is now showing up where other services fall behind – by providing powerful health benefits navigation and an on-the-go healthcare experience with real, human Care Guides that know the plan inside and out, and provide real-time results in less than a minute.

A hub with hustle.

When convenience, simplicity, and real help from a real human being intersect – employees 'get it.' And HR leaders rejoice.
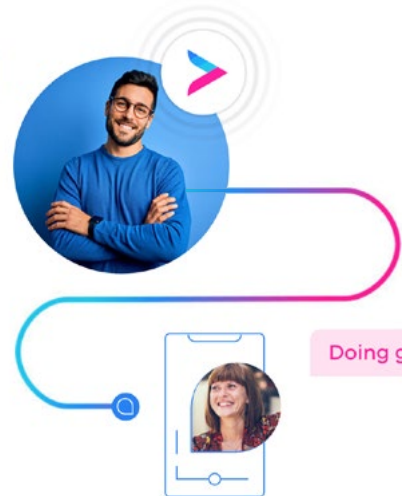
✓ Expand HR's reach

✓ Fast adoption, high engagement

✓ High-value, low-cost decisions

✓ Tools for a competitive edge

✓ Real, human Care Guides

✓ Quick access to benefit cards

✓ Deductible accumulators

✓ Enrollment materials at the ready

✓ Medical bill review

✓ Appointment scheduling

✓ Referral coordination

✓ Vendor integration

✓ Secure & HIPAA compliant

Bold visionaries,
just getting started.

Matt Scovil, CEO

Nathan Gilchrist, COO

Jim Barsness, CFO

Mike Johnson, CTO

"We founded Medefy to help everyday people navigate confusing, complex healthcare like an expert. We do this with the best tech, the best approach and the best employees on Earth. We love what we do, and our users and clients feel the love!"

- Matt Scovil, CEO

Real help, from a real human.

In real time. With guidance that gets results, every time.

$300
Savings per interaction

94%
High-value steerage

45s
Average initial response time

Guides who give a you-know-what.

Every step of the way, 24/7, with text-based communication that makes decision-making easy. Let's see a bot do that.

Proactive outreach
Help members before they even know they need it. Before, during, and after care.

Appointment scheduling
Stop the stall on decision-making. Offer one-on-one help to coordinate, schedule, and follow-up.

Referral management
Streamline the referral runaround. Get users the care they need with compassionate support.

Navigation Support
Get guidance from experts who know the health benefits plan inside and out, and will drive effective usage.

9:41

← Terri

> I was referred to an orthopedic Dr for shoulder pain. I'd like to find a Dr that would minimize my out of pocket expenses for an MRI.
> Thu, Feb 20, 10:36 AM

I'd be happy to help you get set up, your plan offers a few low or no cost options.
Thu, Feb 20, 10:37 AM

It looks like your employer offers 2 options that wouldn't cost you anything out of pocket.
Thu, Feb 20, 10:43 AM

> Awesome! Let's do the one closest to my office.
> Thu, Feb 20, 10:51 AM

Great! Your appointment is all set up.
Thu, Feb 20, 10:53 AM

⬤⬤⬤

📷 Type a message ⬆

🏠 Home 💬 Chat 🔍 Search 💳 Card Wallet ⋯ More

Check out that flawless follow-through.

*An actual conversation with a Medefy Care Guide

Business Continuity and Disaster Recovery Plans

- ### Emergency Management Plan

POLICY

Lifemark Health is committed to creating a safe and healthy environment. The health and safety of our employees, clients and the public are the highest priority of the Lifemark Health Emergency Management Plan. The Lifemark Health Emergency Management Plan will comply with all applicable legislation and regulations and will allow for the continuation of business and the return to normal function as soon as possible after an emergency. Our emergency response priorities are:

- Safety of the Lifemark Health community and the public.
- Environmental protection.
- Asset protection.
- Restoration of Lifemark Health essential services.
- Restoration of Lifemark Health business operations

All Lifemark Health employees, and contracted workers are required to be familiar with the Emergency Response protocols and will actively participate in training, exercises, planning and activation of the Lifemark Health Emergency Management Plan.

PURPOSE

The purpose of the Emergency Management Plan is to establish uniform procedures, strategies, and a concept of operations for a planned, coordinated, effective response to all natural and human-caused emergencies in order to protect human health, property, and the environment during an imminent or actual emergency in or affecting the Lifemark Health operation.

SCOPE & APPLICATION

This policy and the related plan and procedures apply to emergencies that occur on the Lifemark Health facility property. Service delivery outside Lifemark Health facility property will follow local emergency procedures.

DEFINTIONS

For the purpose of this policy and the Emergency Management Plan:
- **Emergency** is an urgent and/or critical situation that threatens or causes harm to people, the environment, and Lifemark Health property and/or disrupts critical operations.
- **Emergency Management** is the universal term for the systems and processes for mitigating, preparing for, responding to and recovering from emergencies and disasters.
- **Emergency Services Personnel** are municipal services that are necessary to enable Lifemark to prevent dangers to life, the destruction or serious deterioration of machinery, equipment or premises, as well as serious environmental damage.

ORGANIZATIONAL STRUCTURE & RESPONSBILITIES

Lifemark Health's Emergency Management Plan is designed to manage all emergency response activities on Lifemark Health facility property. This structure will be mobilized to the extent necessary to effectively deal with the situation. It is composed of the following major elements:

I. EMERGENCY RESPONSE LEVELS

Level 1 (Day to Day Emergency): A situation exists that represents a danger to the Lifemark Health facility; however, it can be handled by the designated **"Site Lead"** and first response from fire, police and/or ambulance. The expected duration of the emergency response phase is **less than 12 hours**.

Level 2 (Major Emergency): A serious emergency exists that represents a danger to the Lifemark Health facility that poses an immediate threat to employees, clients, visitors, or the public that cannot be satisfied by evacuating the building (e.g. major fire, dangerous weather, etc.). The expected duration of the emergency response phase is **between 12 to 24 hours** and it is beyond the capabilities of the **"Site Lead"**. This level of activation may require partial or full support and coordination from Regional /Business as per the Business Continuity Plan.

Level 3 (Disaster): A crisis situation exists that seriously affects the Lifemark Health facility's safety, the environment, or operations and may be a direct and immediate threat to employees, clients, visitors, or the public. It requires a significant response from the municipal jurisdictions emergency response agencies and is expected to have **more than 24- hour duration** for emergency response. This level requires full activation of the Business Continuity Plan and the Crisis Management Team.

II. RESPONSE GROUPS & RESPONSIBILITIES

- **Site Lead /Facility Management (FT) -** Facility Management is the first level of decision-making within Lifemark Health's Emergency Management Plan and is responsible for all first line activities related to an emergency on Lifemark Health property. They co-ordinate activities of all Lifemark Health resources present at the scene of an emergency. Lifemark Health will also coordinate with municipal emergency services personnel and additional emergency resources as required.

- **Business Continuity Plan (BCP) Team is** the primary resource for supporting the Site Lead/Facility Management in an emergency They include:
  - · Executive Team
  - · BCP Lead
  - · Business Lead and/or Regional Lead
  - · Site Lead

·   Site Team
·   Corporate Support
·   Additional members as required

Responsibilities:
·   Please review the Business Continuity Plan for key responsibilities

EMERGENCY COMMUNICATIONS

- **Internal Communications -** Communication in an emergency situation may come to the Lifemark Health location through a variety of resources.

  - **Web Sites:** Emergency information on the Lifemark Health website or intranet
  - **Email:** Security Alerts on e-mail to all Lifemark Health employees with a Lifemarkhealth.ca address and all other list subscribers.
  - **Local TV and radio networks**
  - **Health & Safety Bulletin Boards**
  - **Twitter**

  Senior Management is responsible for all aspects of media relations and internal communications during an emergency. They will employ strategic communications to inform the Lifemark Health community of any danger to safety of individuals and to maintain the image and reputation of Lifemark Health.

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GENERAL PREPAREDNESS – FACILITY MANAGEMENT

- Facility management shall obtain and ensure that the Onsite BCP Resource Binder and all employee Personal Emergency Contacts are obtained on a regular basis. Employee Personal Emergency Information includes:
  - Emergency Contacts (Names and Contact Information)
  - Medical Information if required (complete the details)

  This information should be kept up to date and a copy safely secured at the Facility
  Director/Managers personal residence in case of a facility closure, etc.
- Ensure that all employees are aware of the facility emergency evacuation and accountability plan (EEAP) and relevant emergency response procedures in place at the facility on a regular basis.

- Facility Management will ensure the completion of actual and/or simulated emergency response procedural drills annually for:

  - Fire Evacuation Emergency
  - Bomb Threat Evacuation Emergency
  - Natural Disaster Emergency
  - Utility/Power Outage Emergency
  - Medical Emergency
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Evacuations

If a Lifemark Health fire alarm is sounded, all occupants of a building are expected to evacuate the building immediately. This is both for the safety of the occupants as well as the first responders as it ensures that first responders will not have to re-enter the building to search for individuals who have not evacuated. All employees and are expected to know their facility Assembly Points and alternate Assembly Points for evacuating from the buildings in which they work.

Lockdown

A lockdown is an emergency procedure intended to secure and protect occupants when there is an immediate threat on Lifemark Health property such as an armed intruder. This procedure is used when it may be more dangerous to evacuate a building than to stay inside.

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Employees - If a Lifemark Health facility closure has been announced, employees are expected to:

- Report to their supervisors/managers prior to leaving the facility.
- Remain off- Lifemark Health facility property with the exception of those employees identified.
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GENERAL PREPAREDNESS FOR EMPLOYEES

- Ensures familiarity with and follows Lifemark Health Emergency Response Procedures, as well as, any specific onsite Emergency Response Procedures.
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- Ensures that personal contact information is current and accurate.

Business Continuity and Disaster Recovery Plans
- ### Business Continuity Plan

POLICY

Lifemark Health is committed to providing a safe and secure environment. As part of an overall risk, management strategy Lifemark Health maintains a comprehensive Business Continuity Plan. The plan is based on a formal risk analysis, which determines the essential services, and critical business functions that must be maintained during any disruption of normal operations building organizational resilience.

All Lifemark Health sites have a comprehensive and coordinated set of recovery plans, procedures and resources to respond to emergencies, disasters, incidents (emergency response plans), and both planned and unplanned outages of information technology services and applications.

All Lifemark Health sites/locations ensure that procedures are in place for carrying out the site specific BC plan and ensure that:
- Multiple copies of BC plans are securely stored in locations distant enough so as to not be in danger if a disaster occurs at the particular facility.
- BC plans are protected to maintain the security of organization-specific details.
- BC plans are reviewed and updated quarterly or as required to ensure that they are timely and effective.

All Lifemark Health employees, physicians and contracted workers are required to be familiar with the Emergency Response Protocols, site specific Business Continuity Plans, and actively participate in training, testing exercises, planning and activation of the Lifemark Health Business Continuity Plan.

PURPOSE

The purpose of this policy is to ensure a system-wide, coordinated approach to Business Continuity, Emergency Preparedness and pandemic planning to:
- ensure a common approach for responding to, managing and recovery from emergencies, disasters, incidents;
- ensure the safety and security of all staff, patients/clients and visitors in an emergencies, disasters, incidents; and
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RATIONAL

Lifemark Health Group recognizes the requirement for effective response to both internal and external situations that may impede the organization's ability to provide normal levels of service. Subsequently, Lifemark Group will ensure the best possible service will be provided during a business impairment, emergency or disaster by supporting the development, evaluation and maintenance of an organization wide Emergency Management & Business Continuity Program, and a high level of readiness and a coordinated response.

DEFINITIONS

Business Continuity (BC) includes business continuity, emergency preparedness, pandemic influenza or any disruption to normal operations.

Business Continuity (BC) Plan is the framework for building resilience and capability for an effective organization response and recovery to potential disruptive events. It includes the specific response and recovery protocols based on the routine functions and responsibilities of the "divisional site location". They provide detailed response and recovery protocols and ensure continuity of services through training, planning, testing and maintenance of the protocols.

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- Applications/software/databases
- Storage media/removable storage
- Personal Computers/Laptops/tablets/PDA's/Wireless devices
- Servers/minicomputers/mainframes
- Peripherals
- Data Centers/service centers/any facilities that house the above defined information

Pandemic is a disease that occurs throughout the population of a country or the world.

Pandemic Plan directs Lifemark Health's response to a declaration of a pandemic.

RESPONSIBILITIES
I.   Executive Management Team
- Reflects risk management strategies in the corporate strategic plan.
- Provides resources for a Business Continuity Management program.

	Policy Name: Business Continuity Plan
![Lifemark logo]	*Corporate Health & Safety*
	Form # Adopted Date:
	Position Responsible: Revised Date: VP Quality Improvement

- Provides leadership in the management of disaster and/or emergency events.
- Receives updates on risk management strategies and initiatives through the Enterprise Risk Management Committee.

II. **Enterprise Risk Management Committee (ERM)**

- Assesses the impact on the Lifemark Business Continuity Plan of additions or changes to existing business functions, procedures, equipment, and facilities requirements.
- Provides leadership, guidance, and acts as the coordinating body for identifying, analyzing and managing risk for Lifemark Health.
- Develops, implements, reviews and revises Lifemark Health risk management policies and procedures to identify, assess, control, monitor and measure Lifemark Health risk.
- Undertakes necessary activity to revise and monitor the Lifemark Health risk profile and supporting risk control activities on a regular basis.
- Ensures appropriate mechanisms are established and integrated into Lifemark Health's daily practice, enabling the management of risk, anticipating and preventing adverse outcomes and the evaluation of performance against standards, policies and regulations or legislation.
- Ensures the organization can withstand a test of diligence at all levels of the organization (which includes but is not limited to compliance testing of policies and procedures, internal and external review and audit).
- Supports education to facilitate understanding of risk management/business continuity throughout the organization.
- Reviews Lifemark Health's risk management related plans such as the Business Continuity Plan, Emergency Management Framework and any other contingency related plans on a regular frequency, as determined by Lifemark Health Senior Management Team.
- Ensures annual priorities for business continuity planning activities are established and monitored in recognition of business continuity being a major risk for Lifemark Group.

- **Membership**
    1. Director of Corporate Compliance (Co-Chair)
    2. Information Technology (Co-Chair)
    3. Executive Assistant to Quality Improvement & Innovation (Recorder)
    4. VP Quality
    5. Human Resources
    6. Finances
    7. Lifemark Rehab
    8. Lifemark Senior Wellness
    9. Lifemark CAR
    10. Viewpoint

III.   Business Continuity Lead

- Partners with the site/location BC team in the direction and support of business continuity planning for Lifemark Group business.
- Determines and partners with the Enterprise Risk Management Committee (ERM) and site/location BCP team in development of plans for business continuity educational needs.
- Where appropriate, makes and forwards recommendations to the Enterprise Risk Management (ERM) Committee on strategic initiatives to ensure optimal planning for and provision of services during an emergency, disaster, incident, or outage of information technology services and applications.
- Ensures implementation, communication and education of all Lifemark Health BC plans.
- Ensures consistent development and review of emergency response procedures, with adherence to the Lifemark Health BC plans.

IV.   Site BCP Teams

- Implements the BC plans at the site level.
- Determines Emergency Response Procedures (ERP) that apply to the specific site.
- Develops, implements, evaluates and annually reviews and updates accordingly the Site Plan in consultation with the designated Business Continuity Lead.
- Distributes updated plans to all relevant stakeholders at the site.
- Determines which information technology services and internal and external software applications the department is dependent upon, the severity of these dependencies, and the business processes that are affected if these services or applications abruptly become unavailable for an indeterminate period of time.
- Ensures services departments annually review and update accordingly their BC and emergency plans.
- Ensures departmental telephone fan-outs/phone trees are updated quarterly and as required.
- Ensures that site staff are knowledgeable and competent in their role in the event of a disaster, emergency, incident, or outage of information technology services or applications.
- Participates in an annual testing exercise of the BC Plan. The only exception would be if a site has experienced a major incident. Lessons learned and recommendation should be shared with staff.
- Communicates to and educates staff of changes to the site BC plan.

V.   Site Managers or Supervisors

- Ensures all employees who report to them receive orientation to site-specific emergency response plans and Business Continuity Plan.

VI.   All Staff

- Must be familiar with the Lifemark Health Plans for Business Continuity,

Emergency Preparedness and Pandemic as well as the relevant Site and Department Plans.

- Ensures familiarity with and follows Lifemark Health Emergency Response protocols as well as any specific site Emergency Response procedures.
- Attends and completes prescribed education and training programs.
- Ensures that personal contact information is current and accurate.
- Works as required in an emergency. In an emergency event, changes to normal job activities and locations may be required with minimal notice.
- Must be prepared to respond effectively in emergencies, disasters, incidents, and outages of information technology services and applications.

POLICY MANAGEMENT
The management of this policy including policy education, monitoring, implementation and amendment is the responsibility of the Enterprise Risk Management Committee.

NON COMPLIANCE
Non-compliance with Lifemark Health Policy and/or Procedures shall result in, at a minimum, a review of the incident. Non-compliance could also result in disciplinary actions up to and including termination of employment/contract/relationship with Lifemark Health.

RESOURCES
- Master Business Continuity Plan Lifemark Health

INCIDENT REPORTING & INVESTIGATION POLICY

Policy

Lifemark wishes to promote the safety of all its employees through accident prevention and compliance with provincial Occupational Health and Safety Act (OHSA). This policy sets out guidelines and procedures for the reporting and investigation of incidents.

Purpose

The purpose of incident reporting and investigation is to determine the cause(s), identify any unsafe conditions, acts other deficiencies that may be contributing factors and, where appropriate/applicable, make corrective recommendations to prevent reoccurrence. Incident investigations will be conducted whenever there is a workplace injury, accident, illness or exposure or where there is an incident where there was a potential for a work-related injury, accident, illness or exposure. No fault or blame is to be placed on any individual as a result of an investigation process.

Scope

This policy applies to all Lifemark staff, as well as, independent contractors providing services for or on behalf of Lifemark, and is inclusive to all incidents that occur in the course of work activities on Lifemark properties or during the delivery of Lifemark services off site.

INTERNAL – Contractor OHW Incident Report

Nurse Name:_____

Date of Incident	MM/DD/YYYY
Time of incident	
Type of Incident (ie, Fall)	
Clinic Name	
Clinic Location	
Site Contact Name	
Site Contact #	

Participant Name	
Contact Phone #	
Participant Email	

Describe the event, issue or situation. What happened?

Action taken

Who was notified	Nurse Signature	Date

For Office Use Only	
Report received date	Reviewed and online report submitted by
	Name: Date:

Outcome/ Follow-ups Notes	
Date incident report closed	

CLIENT & STAKEHOLDER COMPLAINT PROCESS

Policy

Each individual participating in any program, as well as all other key stakeholders, are provided with the opportunity to file a complaint about service or accessibility or appeal any decision made by the Lifemark staff, regarding their rehabilitation or wellness program without fear of reprisal or barriers to services.

Definition of a Formal Complaint: A consumer complaint or customer complaint is "an expression of dissatisfaction on a consumer's behalf to a responsible party" (Landon, 1980). It can also be described in a positive sense as a report from a consumer providing documentation about a problem with a product or service. A complaint can be received verbally, via phone, email or by any other means of communication.

Purpose

It is within the human rights and dignity of clients and stakeholders served to have the opportunity to question decisions regarding their or their client's rehabilitation or wellness program. This form of immediate feedback will also serve to ensure quality of service.

Procedure

1. Any client or stakeholder who verbalizes a complaint shall be informed that all complaints are taken seriously. As a first step, the individual will be encouraged to discuss their concern with the treatment provider. If the issue is not resolved the client or stakeholder will be requested to put their complaint in writing. This can be done using a Client Complaint Form or independently. The written complaint should be forwarded to the Account Manager.
2. With respect to verbal and written complaints the Account Manager shall address the issue within three days of receiving a written complaint. All relevant information will be reviewed including communication with the client and/or stakeholder and the treatment provider and a decision will be made on the best way to handle the situation. Strategies considered should include:
    a. When appropriate, a meeting can be set up between the client / stakeholder and specific party stated on the form to attempt to resolve the complaint.
    b. A therapy team meeting can be held with the client present.
    c. The Account Manger can further discuss the complaint with the client/stakeholder to come to a mutual agreeable resolution.
    d. A meeting with an independent Lifemark corporate director can be set up.
3. Any action taken to address the complaint shall be documented on the Client/Stakeholder Complaint Form.
4. All completed Client / Stakeholder Complaint Forms will be brought to the attention of the Account Manager and will be forwarded to the Director, Health and Wellness and the VP of Quality Improvement.
5. In cases where complaints are expressed but a form is not filled out, the staff member who received the verbal complaint will complete a form and submit it to the Account Manager who will contact the client to determine if the above strategies are warranted to resolve the complaint.
6. In cases where the client / stakeholder is not satisfied with the internal complaint resolution

process will escalate to the Corporate Leadership and information will be provided, without prejudice, on how to contact the appropriate Regulatory Board(s)for the discipline(s) addressed in the complaint.

Lifemark strives to have issues addressed within 72 hours.

CANCELLATION POLICY

Lifemark requires cancellation notice with 15 or more business days incurs no charge; otherwise, 100% of the applicable fees for the clinic will be applied.

15 business days – deadline for changes @ 0%

21 business days

Nurses / Coordinators scheduling begins

21 business days

Supplies ordered

12 business days

-Confirmation of clinics with nurses / coordinators
- Bins packed
-Affiliate equipment and supplies shipped out

10 business days*

Equipment and supplies shipped out including clinic schedule

5 business days

Reminder notification to nurses of clinic

CLINIC DAY

Business Continuity and Disaster Recovery Plans

- ### Emergency Management Plan

POLICY

Lifemark Health is committed to creating a safe and healthy environment. The health and safety of our employees, clients and the public are the highest priority of the Lifemark Health Emergency Management Plan. The Lifemark Health Emergency Management Plan will comply with all applicable legislation and regulations and will allow for the continuation of business and the return to normal function as soon as possible after an emergency. Our emergency response priorities are:

- Safety of the Lifemark Health community and the public.
- Environmental protection.
- Asset protection.
- Restoration of Lifemark Health essential services.
- Restoration of Lifemark Health business operations

All Lifemark Health employees, and contracted workers are required to be familiar with the Emergency Response protocols and will actively participate in training, exercises, planning and activation of the Lifemark Health Emergency Management Plan.

PURPOSE

The purpose of the Emergency Management Plan is to establish uniform procedures, strategies, and a concept of operations for a planned, coordinated, effective response to all natural and human-caused emergencies in order to protect human health, property, and the environment during an imminent or actual emergency in or affecting the Lifemark Health operation.

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ORGANIZATIONAL STRUCTURE & RESPONSBILITIES

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  - · Executive Team
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<table>
	Policy Name:	**Emergency Management Plan**
lifemark		*Corporate Health & Safety*
	Form #	Adopted Date:
	Position Responsible: VP Quality Improvement	Revised Date:
</table>

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Business Continuity and Disaster Recovery Plans
- **Business Continuity Plan**

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Pandemic is a disease that occurs throughout the population of a country or the world.

Pandemic Plan directs Lifemark Health's response to a declaration of a pandemic.

RESPONSIBILITIES
I.   Executive Management Team
- Reflects risk management strategies in the corporate strategic plan.
- Provides resources for a Business Continuity Management program.

- Provides leadership in the management of disaster and/or emergency events.
- Receives updates on risk management strategies and initiatives through the Enterprise Risk Management Committee.

II.   Enterprise Risk Management Committee (ERM)

- Assesses the impact on the Lifemark Business Continuity Plan of additions or changes to existing business functions, procedures, equipment, and facilities requirements.
- Provides leadership, guidance, and acts as the coordinating body for identifying, analyzing and managing risk for Lifemark Health.
- Develops, implements, reviews and revises Lifemark Health risk management policies and procedures to identify, assess, control, monitor and measure Lifemark Health risk.
- Undertakes necessary activity to revise and monitor the Lifemark Health risk profile and supporting risk control activities on a regular basis.
- Ensures appropriate mechanisms are established and integrated into Lifemark Health's daily practice, enabling the management of risk, anticipating and preventing adverse outcomes and the evaluation of performance against standards, policies and regulations or legislation.
- Ensures the organization can withstand a test of diligence at all levels of the organization (which includes but is not limited to compliance testing of policies and procedures, internal and external review and audit).
- Supports education to facilitate understanding of risk management/business continuity throughout the organization.
- Reviews Lifemark Health's risk management related plans such as the Business Continuity Plan, Emergency Management Framework and any other contingency related plans on a regular frequency, as determined by Lifemark Health Senior Management Team.
- Ensures annual priorities for business continuity planning activities are established and monitored in recognition of business continuity being a major risk for Lifemark Group.

- **Membership**
  1. Director of Corporate Compliance (Co-Chair)
  2. Information Technology (Co-Chair)
  3. Executive Assistant to Quality Improvement & Innovation (Recorder)
  4. VP Quality
  5. Human Resources
  6. Finances
  7. Lifemark Rehab
  8. Lifemark Senior Wellness
  9. Lifemark CAR
  10. Viewpoint

III. **Business Continuity Lead**
  - Partners with the site/location BC team in the direction and support of business continuity planning for Lifemark Group business.
  - Determines and partners with the Enterprise Risk Management Committee (ERM) and site/location BCP team in development of plans for business continuity educational needs.
  - Where appropriate, makes and forwards recommendations to the Enterprise Risk Management (ERM) Committee on strategic initiatives to ensure optimal planning for and provision of services during an emergency, disaster, incident, or outage of information technology services and applications.
  - Ensures implementation, communication and education of all Lifemark Health BC plans.
  - Ensures consistent development and review of emergency response procedures, with adherence to the Lifemark Health BC plans.

IV. **Site BCP Teams**
  - Implements the BC plans at the site level.
  - Determines Emergency Response Procedures (ERP) that apply to the specific site.
  - Develops, implements, evaluates and annually reviews and updates accordingly the Site Plan in consultation with the designated Business Continuity Lead.
  - Distributes updated plans to all relevant stakeholders at the site.
  - Determines which information technology services and internal and external software applications the department is dependent upon, the severity of these dependencies, and the business processes that are affected if these services or applications abruptly become unavailable for an indeterminate period of time.
  - Ensures services departments annually review and update accordingly their BC and emergency plans.
  - Ensures departmental telephone fan-outs/phone trees are updated quarterly and as required.
  - Ensures that site staff are knowledgeable and competent in their role in the event of a disaster, emergency, incident, or outage of information technology services or applications.
  - Participates in an annual testing exercise of the BC Plan. The only exception would be if a site has experienced a major incident. Lessons learned and recommendation should be shared with staff.
  - Communicates to and educates staff of changes to the site BC plan.

V. **Site Managers or Supervisors**
  - Ensures all employees who report to them receive orientation to site-specific emergency response plans and Business Continuity Plan.

VI. **All Staff**
  - Must be familiar with the Lifemark Health Plans for Business Continuity,

Emergency Preparedness and Pandemic as well as the relevant Site and Department Plans.

- Ensures familiarity with and follows Lifemark Health Emergency Response protocols as well as any specific site Emergency Response procedures.
- Attends and completes prescribed education and training programs.
- Ensures that personal contact information is current and accurate.
- Works as required in an emergency. In an emergency event, changes to normal job activities and locations may be required with minimal notice.
- Must be prepared to respond effectively in emergencies, disasters, incidents, and outages of information technology services and applications.

POLICY MANAGEMENT

The management of this policy including policy education, monitoring, implementation and amendment is the responsibility of the Enterprise Risk Management Committee.

NON COMPLIANCE

Non-compliance with Lifemark Health Policy and/or Procedures shall result in, at a minimum, a review of the incident. Non-compliance could also result in disciplinary actions up to and including termination of employment/contract/relationship with Lifemark Health.

RESOURCES

- Master Business Continuity Plan Lifemark Health

INCIDENT REPORTING & INVESTIGATION POLICY

Policy

Lifemark wishes to promote the safety of all its employees through accident prevention and compliance with provincial Occupational Health and Safety Act (OHSA). This policy sets out guidelines and procedures for the reporting and investigation of incidents.

Purpose

The purpose of incident reporting and investigation is to determine the cause(s), identify any unsafe conditions, acts other deficiencies that may be contributing factors and, where appropriate/applicable, make corrective recommendations to prevent reoccurrence. Incident investigations will be conducted whenever there is a workplace injury, accident, illness or exposure or where there is an incident where there was a potential for a work-related injury, accident, illness or exposure. No fault or blame is to be placed on any individual as a result of an investigation process.

Scope

This policy applies to all Lifemark staff, as well as, independent contractors providing services for or on behalf of Lifemark, and is inclusive to all incidents that occur in the course of work activities on Lifemark properties or during the delivery of Lifemark services off site.

INTERNAL – Contractor OHW Incident Report

Nurse Name:_____

Date of Incident	MM/DD/YYYY
Time of incident	
Type of Incident (ie, Fall)	
Clinic Name	
Clinic Location	
Site Contact Name	
Site Contact #	

Participant Name	
Contact Phone #	
Participant Email	

Describe the event, issue or situation. What happened?

Action taken

Who was notified	Nurse Signature	Date

For Office Use Only		
Report received date	Reviewed and online report submitted by	
	Name:	Date:

Outcome/ Follow-ups Notes	
Date incident report closed	

CLIENT & STAKEHOLDER COMPLAINT PROCESS

Policy

Each individual participating in any program, as well as all other key stakeholders, are provided with the opportunity to file a complaint about service or accessibility or appeal any decision made by the Lifemark staff, regarding their rehabilitation or wellness program without fear of reprisal or barriers to services.

Definition of a Formal Complaint: A consumer complaint or customer complaint is "an expression of dissatisfaction on a consumer's behalf to a responsible party" (Landon, 1980). It can also be described in a positive sense as a report from a consumer providing documentation about a problem with a product or service. A complaint can be received verbally, via phone, email or by any other means of communication.

Purpose

It is within the human rights and dignity of clients and stakeholders served to have the opportunity to question decisions regarding their or their client's rehabilitation or wellness program. This form of immediate feedback will also serve to ensure quality of service.

Procedure

1. Any client or stakeholder who verbalizes a complaint shall be informed that all complaints are taken seriously. As a first step, the individual will be encouraged to discuss their concern with the treatment provider. If the issue is not resolved the client or stakeholder will be requested to put their complaint in writing. This can be done using a Client Complaint Form or independently. The written complaint should be forwarded to the Account Manager.
2. With respect to verbal and written complaints the Account Manager shall address the issue within three days of receiving a written complaint. All relevant information will be reviewed including communication with the client and/or stakeholder and the treatment provider and a decision will be made on the best way to handle the situation. Strategies considered should include:
   a. When appropriate, a meeting can be set up between the client / stakeholder and specific party stated on the form to attempt to resolve the complaint.
   b. A therapy team meeting can be held with the client present.
   c. The Account Manger can further discuss the complaint with the client/stakeholder to come to a mutual agreeable resolution.
   d. A meeting with an independent Lifemark corporate director can be set up.
3. Any action taken to address the complaint shall be documented on the Client/Stakeholder Complaint Form.
4. All completed Client / Stakeholder Complaint Forms will be brought to the attention of the Account Manager and will be forwarded to the Director, Health and Wellness and the VP of Quality Improvement.
5. In cases where complaints are expressed but a form is not filled out, the staff member who received the verbal complaint will complete a form and submit it to the Account Manager who will contact the client to determine if the above strategies are warranted to resolve the complaint.
6. In cases where the client / stakeholder is not satisfied with the internal complaint resolution

process will escalate to the Corporate Leadership and information will be provided, without prejudice, on how to contact the appropriate Regulatory Board(s)for the discipline(s) addressed in the complaint.

Lifemark strives to have issues addressed within 72 hours.

CANCELLATION POLICY

Lifemark requires cancellation notice with 15 or more business days incurs no charge; otherwise, 100% of the applicable fees for the clinic will be applied.

15 business days –
deadline for changes @ 0%

21 business days

Nurses / Coordinators scheduling begins

21 business days

Supplies ordered

12 business days

-Confirmation of clinics with nurses / coordinators

- Bins packed

-Affiliate equipment and supplies shipped out

10 business days*

Equipment and supplies shipped out including clinic schedule

5 business days

Reminder notification to nurses of clinic

CLINIC DAY