

CCR CARELON HEALTH

CORE SERVICES PHONE CALL

INSTRUCTIONS

QUESTIONNAIRE

You will call the assigned healthcare clinic and present a specific scenario about a person you know who needs mental health services. Information about your specific assigned scenario is detailed in the SCENARIO link below. You will evaluate how the agent responds to your scenario and what information they proactively provide.

Before You Begin

- Review your shop confirmation
- Know your specific assigned scenario
- Review scenario details in linked document
- Know what information to listen for
- Know how to respond to certain questions

Don't Forget!

- Call during your assigned timeframe—EST
- Present the correct scenario and background
- Do not prompt for specific information
- Ask for the hours of operation
- Include detailed narrative to describe your call



General Requirements

- Read all instructions and the entire questionnaire before you complete the shop.
- Answer all questions and provide detailed supporting narrative to explain your responses.
- Do not reveal your identity as a mystery shopper UNLESS it is absolutely necessary at the end of the call. This would be rare and the scenarios are built to avoid this happening.
- Do not say or do anything to limit the opportunity for the associate(s) to perform the behaviors the survey is designed to evaluate.
- Do not give out your personal information.
- Submit your report to shopperhub.cxgroup.com within 12 hours of completing the shop. If your survey is not submitted by the deadline, it will be automatically cancelled.
- If a Quality Assurance Editor contacts you for additional information or clarification about your experience, respond promptly.
- Retain all documentation for six months following your shop.
- You or your immediate family members cannot currently nor have ever worked for any health insurance company or health services clinic.
- Failure to follow the specifications for this project as outlined in this document may result in shop cancellation and non-payment.



IMPORTANT—Review Your Assigned Scenario

- Locate your Assignment Confirmation email.
- Within the Assignment Confirmation email, locate your Scenario.
- **Click the below SCENARIO link and locate the scenario that matches your Assignment Confirmation email:**
 - [SCENARIO – CLICK HERE](#)
- The steps below indicate when to provide your scenario and when to respond with background information if necessary. You MUST provide the correct scenario/background on the linked document that matches your Assignment Confirmation email. If you provide the wrong scenario, your shop will be invalid.
- Contact the help desk or your scheduler immediately and before completing this shop if you do not know what your assigned scenario is.



Shop Instructions

Step #1: Call the assigned healthcare clinic.

- Call the assigned healthcare clinic on your assigned shop date.
- You must call during your assigned timeframe, which is listed in eastern standard time (EST). Adjust to EST if you live in a different time zone. Enter times in your survey form in eastern standard time.
- The call may be connected immediately to a person OR a phone tree with options for selection OR it may connect to music or a recorded message with no options to select before being answered by a live agent.
 - If you reach a phone tree, follow the prompts to reach a live person.
 - If you are connected to music or a recording, stay on the line until someone answers.
 - If you reach a voicemail, do not leave a message and do not make any additional call attempts. Hang up and contact the help desk or your scheduler immediately.
- You must ask to be transferred to the assigned location if the phone is answered by an associate who identifies with a different location. Some clinics have multiple locations and share the same phone line. If you are not sure if you've reached the correct clinic, ask for clarification or ask to be transferred to the assigned clinic location.
- If you are placed on hold, time how long each hold is. You will need to indicate in your survey form how many times you were placed on hold for 30 seconds or longer.
 - If your hold time is 29 seconds or less, it does not count.
 - If you are initially connected to music or a recording, this does not count as being placed on hold. Only count instances where a live person places you on hold for 30 seconds or longer.
- If you are transferred (from live person to live person), count how many times you had to repeat your scenario.
 - If you are transferred but do not have to repeat your scenario, it does not count.
 - If you are initially transferred by the system, this does not count. Only count instances where you are transferred after you have provided your scenario, to evaluate how many times you have to repeat your story.
- If you are asked where you live at any time during the call, choose one of the cities listed towards the top of this page. You do not need to actually live in any of these cities, but IF asked, you must indicate that you live somewhere in close proximity to the assigned location (i.e., so it would make sense for someone from the

assigned clinic to assist you). The highlighted cities are further away but should still apply. Do not prompt or provide this information unless you are asked.

Step #2: Interact with the healthcare agent.

- Carefully listen to how the agent answers the phone—note *exactly* what they say in their greeting, including:
 - Did the agent tell you their name?
 - Did the agent identify their location (i.e., the clinic name) AND identify as a CBHC? (They must say “CBHC” specifically, which stands for Community Behavioral Health Center.)
 - The agent must include both parts (clinic name + CBHC) to get credit for this question.
 - For example: “Thank you for calling [clinic name], a CBHC location, how may I help you?”
 - If the agent did NOT identify the clinic name AND say “CBHC,” you will need to indicate in your survey form how the agent introduced the location.
- Present your assigned scenario as outlined in the linked document above. The scenario you present MUST match your assignment confirmation email.
- Respond with background information as outlined in the linked document above, if necessary—do not offer this information, but respond appropriately if the agent asks.
- Evaluate how the agent responds to your scenario—do not prompt for these specific timeframes or appointment types, but listen to what information the agent proactively provides:
 - Does the clinic offer a medication appointment today or tomorrow?
 - Do they offer a medication appointment within 48 hours?
 - Do they offer a medication appointment within 72 hours?
 - Do they offer a medication appointment beyond 72 hours from now?
 - Did the agent inform you about crisis services that were available?
 - Did they recommend going to the emergency department OR did they refer you to crisis services?
 - Did the agent offer to put you on a waiting list for an appointment?
- Evaluate the clinic's hours of operation—if the agent does not proactively state this information, you must directly ask when they are open, at some point during your call.
 - The MINIMUM standard is 8am-8pm weekdays AND 9am-5pm weekends.
 - Examples of being open LESS than the minimum: 8am-4pm weekdays, 12pm-5pm weekends, any timeframe that is SHORTER than the minimum.
 - Examples of being open BEYOND the minimum (this is OK and agent earns full points): 8am-10pm weekdays, 9am-7pm weekends, any specific timeframe that is LONGER than the minimum.
 - The agent should NOT state they are open 24/7, 24 hours a day or always open, by appointment only, or indicate that they can't provide specific hours of operation. If any of these instances occur, the agent should not earn points in the survey.
 - Include in your survey narrative exactly what the agent stated the hours of operation were.

Step #3: Conclude the call.

- To wrap up the phone call, thank the agent for letting you know about the options / providing the information.
- If appropriate to your assigned scenario, say you will discuss it with [the patient or another appropriate party as it

relates to your assigned scenario], before scheduling anything.

- Ask for the agent's name towards the end of the call, if they did not state their name in the greeting. Indicate in your survey narrative that their name was not proactively stated and you had to ask for it.
- Do not provide your personal details to the agent at any time. If the agent tells you someone will need to call you back, do not give your personal details and close the call.
- IF the agent still seems concerned at this point, then tell them you are part of a mystery shopper program for quality assurance. You should only reveal yourself if it is absolutely necessary to avoid further concern or action, such as if the agent indicates they need to call 911. Do not reveal yourself if you do not need to.

Step #4: Evaluate your overall call experience.

- Evaluate your overall call experience (1 = Very Bad ; 3 = Okay ; 5 = Very Good). Do not score down for factors outside the agent's control.
- Use the narrative box at the end of the survey to describe everything that happened on your call, including:
 - Wait times, if you are put on hold, if you are told to speak to another agent, etc.
 - The full details of your experience with the agent who dealt with your inquiry/scenario.
 - The clinic's hours of operation as provided by the agent.
 - Justification for your overall call rating.

QUESTIONNAIRE

Shop date:

Start time:

End time:

Category Name

1. This is question number one.

Example of some help text. I love help text. It is so helpful.

Yes

No

2. This is question number two.

Yes

N/A

No

3. Would you recommend this store?

Format answer text as a single column first using the 'Answer text' style, then use 'Layout -> Columns -> Two' to get it into this format.

10

4

9

3

8

2

7

1

6

0

5

4. Question 4:

Really long response options will word wrap when necessary

This is another really long response option that will word wrap

5. Provide commentary:

Provide some commentary to tell the client about your experience.

END OF QUESTIONNAIRE