

APPOINTMENT WAIT TIME

INSTRUCTIONS • QUESTIONNAIRE

Call a health practitioner's office while posing as a new patient and while using an assigned specialty/scenario to determine the dates of the first available in-person and telehealth appointments. The call is expected to take 5-10 minutes. No appointment will be made.

Before You Begin

- Review your shop confirmation
- Know your practitioner and specialty
- Know the reason for your appointment
- Know your assigned health insurance
- Know your assigned city, zip, and county

Don't Forget!

- Only call Mon-Fri 9am-4pm
- Present the correct scenario
- Ask all required questions
- Get the first available appt. date
- Submit a screenshot of the call record



General Requirements

- Read all instructions and the entire questionnaire before you complete the shop.
- Review your shop confirmation to obtain important details before calling.
- Call Mon-Fri 9am-4pm. Do not call on weekends or federal holidays.
- Follow your assigned scenario, and ask all required questions.
- Submit your report to shopperhub.cxgroup.com within 12 hours of completing the shop.
 - Include a screenshot of each call record from your phone for proof of shop.
- Retain all documentation for six months following your shop.
- You or your immediate family members cannot work for the practitioner's office you are calling.



Shop Instructions

Step #1: Know your scenario details before calling (listed in your shop confirmation)

- Check your shop confirmation for the following information:
 - Your assigned scenario (outpatient behavioral health or primary care)
 - Reason for the appointment (if asked, otherwise do not say)
 - Your assigned health insurance (if asked, otherwise do not say)
 - Your assigned city, state, zip code, and county (if asked, otherwise do not say)
 - Your assigned practitioner and their specialty
 - i. Example of practitioners: doctor, nurse practitioner, therapist, counselor, etc.
 - ii. Examples of specialty: general medicine, marriage counseling, social worker, etc.

- If your confirmation indicates pediatric, you're calling for an appointment for your child.
- If your confirmation indicates geriatric, you're calling for an appointment for your elderly parent.
- If your confirmation indicates family member, choose an immediate family member.
- If your confirmation does not indicate pediatric, geriatric, or family member, call for yourself.

Step #2: Call to speak to a representative (you are a new patient to the practitioner)

- Have all your scenario information in front of you to avoid sounding like you are looking it up.
- Ask all required questions and obtain all required information found in the table below.
- You may have to call up to three times to reach a representative.
 - If you get voicemail, do not leave a message.
 - If you are asked for your phone number to receive a call back, do not provide it.
- Do not make an appointment. Say you will need to check your calendar before scheduling.

Questions and information to document	What you need to ask
<p>Question #1</p> <ul style="list-style-type: none"> • <i>Practitioner name and scenario can be found in your shop confirmation. Your scenario is either 'primary care' or 'outpatient behavioral health.'</i> 	<ul style="list-style-type: none"> • Ask: "Can you tell me if (name of practitioner) offers (your scenario)?" <i>Example: "Can you tell me if Dr. Jones offers outpatient behavioral health services?"</i>
<p>Question #2a</p>	<ul style="list-style-type: none"> • Say: "I would be a new patient. Can you tell me if (name of practitioner) offers in-person and telehealth appointments for new patients?"
<p>Question #2b</p> <ul style="list-style-type: none"> • <i>If asked for time of day, say any time is fine.</i> • <i>If asked which Louisiana Blue insurance plan you have, say 'Blue Cross.'</i> • <i>Do <u>not</u> indicate you are on Medicare or Medicaid.</i> • <i>Write down the first available in-person appt date.</i> • <i>Write down the first available telehealth appt date.</i> 	<ul style="list-style-type: none"> • If in-person only, ask: "What is the first available appointment date?" • If telehealth only, ask: "What is the first available appointment date?" • If both in-person and telehealth, ask: <ul style="list-style-type: none"> ○ "What is the first available in-person appointment date?" ○ "What is the first available telehealth appointment date?" • If patients are seen on a walk-in or same-day basis only, ask: "What date would a patient walking in be seen?"
<p>Question #2c (if applicable)</p> <ul style="list-style-type: none"> • <i>If your assigned practitioner is not accepting new patients, ask these questions.</i> 	<ul style="list-style-type: none"> • If not accepting new patients, ask: <ul style="list-style-type: none"> ○ "Do you know when (name of practitioner) will start accepting new patients again?" ○ "Is there a wait list for new patients to see (name of practitioner)?" <ul style="list-style-type: none"> ▪ If yes, ask: "How long does it usually take to get off the wait list?"
<p>Question #3 (if applicable)</p> <ul style="list-style-type: none"> • <i>If your assigned practitioner is temporarily unavailable due to vacation, sabbatical, parental leave, personal issue, etc., ask these questions.</i> 	<ul style="list-style-type: none"> • Ask: "Is there an estimated date for when (name of practitioner) will be able to offer new patient appointments again?" <ul style="list-style-type: none"> ○ If yes, write down when the practitioner will be offering appointments again (e.g., next week, 2-3 weeks, 3 months, etc.).

Other possible scenarios and what to say

If offered an alternate practitioner appointment

- If offered an appointment with an alternate practitioner in the same office and specialty, get the first available in-person and/or telehealth appointment date(s) for the alternate (equivalent) practitioner.
 - An alternate (equivalent) practitioner appointment may be offered in addition to or instead of an appointment with your assigned practitioner.
 - If you are offered dates for both your assigned practitioner and an alternate practitioner, get the first available appointment dates (in-person and telehealth) for both practitioners.
- Write down the alternate practitioner’s name and specialty. Ask for the name and specialty if not provided.
- Do **not** ask about an alternate practitioner if the representative doesn’t mention one.

If asked for your DOB, SSN, insurance policy #, employer or spouse information, etc.

- Ask if they can provide the first available appointment date without this information. You can say you are just trying to organize your schedule right now and can provide the information later.
- If they insist that the information is required and won’t give you a date without it, you may end the call, and submit your report as unsuccessful.

Unsuccessful call attempts

- Use the table below to determine the minimum level of effort you must make for payment.
- This is not an exhaustive list of potential call outcomes; contact your scheduler if you encounter an issue not on this list and you’re unsure if you need to make more than one call attempt.

Outcome of your phone call	Action you should take
<ul style="list-style-type: none"> • Phone rings for more than 5 minutes without answer. • You get voicemail during business hours (no automated appointment scheduling feature). • You are asked to provide your phone number for a call back (do not give it). • You are placed on hold for more than 15 minutes. • You navigate a phone tree for more than 20 minutes. • There is a communication issue or poor connectivity. 	<ul style="list-style-type: none"> • Call a second time Mon-Fri 9am-4pm. • Wait at least 3 hours after your first call attempt (or call the next business day). • If any of these outcomes occur on the second attempt, call a third time Mon-Fri 9am-4pm (waiting at least 3 hours after the second call). • If you do not speak to a representative after the third attempt, submit your report as unsuccessful. This will be a total of three call attempts.
<ul style="list-style-type: none"> • Phone number is not valid (disconnected, you are told the assigned practitioner doesn’t work there, etc.). • You are required to provide more information to get an appointment than you can reasonably provide. • You get voicemail with an automated appointment scheduling feature (i.e., the only way to schedule an appointment is by getting a return call). • You have to use an online scheduling tool or online patient portal to schedule an appointment. • Referral is required as a prerequisite to obtain an appointment. • Practitioner is not a provider for your assigned scenario (primary care or behavioral health). • Practitioner is not currently accepting your assigned insurance (Louisiana Blue). • Practitioner does not contract with your assigned insurance (Louisiana Blue). 	<ul style="list-style-type: none"> • Your shop is complete. Submit your report asap. • Do not make any additional call attempts. <p><u>Unsuccessful call tips:</u></p> <ul style="list-style-type: none"> • <i>If you get an individual’s voicemail and that person’s name does not match your assigned practitioner, you must call back. Do not assume the phone number is not valid only because you reached the voicemail of one of several doctors who may be working at the practice. You must try to get someone on the phone who can confirm if your assigned practitioner works there.</i> • <i>If you receive voicemail or the phone number is not valid, be prepared to provide a transcript of the voicemail message or conversation in your report, including the name of the medical provider or individual identified in the message/conversation.</i>



QUESTIONNAIRE

Visit date:

Start time:

End time:

Appointment Wait Time

1. Which scenario did you use for the call?

If your shop was unsuccessful after the required number of call attempts, select the scenario you were assigned.

Outpatient behavioral health

Primary care

2. Did you speak to a representative on your first call attempt?

Answer No if you weren't able to get anyone on the phone or you got someone on the phone but were unable to talk to them about an appointment date (e.g., connectivity or communication issue).

Yes

No

3. If no, what was the reason?

Phone number not valid

Phone rang for 5 minutes with no answer

Received voicemail during regular hours (not lunch hour or part of a scheduling process)

Placed on hold for 15 minutes or navigating phone tree for 20 minutes

Communication issue or poor connectivity

Voicemail required specific details to receive a call back to schedule an appointment

Had to use online scheduling tool or online patient portal to schedule an appointment

None of the above

N/A

4. Provide details for why you could not speak to someone:

Provide a paragraph of detailed commentary to explain what happened. If you reached voicemail, enter a transcript of the message, including the name of the provider or individual identified in the recording, what information you were asked to leave, etc. If the phone number was not valid, include the name of the provider or person the incorrect phone number belongs to.

5. Date and time of your first contact attempt:

This is the date and time you first called the office. Example format: 2/5/2025 1:50 PM

6. Contact_1_Time:

Select AM if you called before 12pm. Select PM if you called 12pm or later.

AM

PM

7. Contact_1_Disposition:

Do not answer; CX Group will answer.

A

H

B

I

C

J

D

K

E

L

F

M

G

N

- O
- P
- Q
- R

- S
- T
- U

8. Did you speak to a representative on your second call attempt?

Answer No if you weren't able to get anyone on the phone or you got someone on the phone but were unable to talk to them about an appointment date (e.g., connectivity or communication issue).

- Yes
- No
- N/A

9. If no, what was the reason?

- Phone rang for 5 minutes with no answer
- Received voicemail during regular hours (not lunch hour or part of a scheduling process)
- Placed on hold for 15 minutes or navigating phone tree for 20 minutes
- Communication issue or poor connectivity
- None of the above
- N/A

10. Provide details for why you could not speak to someone:

Provide a paragraph of detailed commentary to explain what happened. If you reached voicemail, enter a transcript of the message, including the name of the provider or individual identified in the recording, what information you were asked to leave, etc.

11. Date and time of your second contact attempt:

This is the date and time you called the office a second time (if required). Example format: 2/5/2025 1:50 PM

12. Contact_2_Time:

Select AM if you called before 12pm. Select PM if you called 12pm or later.

- AM
- PM
- N/A

13. Contact_2_Disposition:

Do not answer; CX Group will answer.

- A
- B
- C
- D
- E
- F
- G
- H
- I
- J
- K
- L
- M
- N
- O
- P
- Q
- R
- S
- T
- U
- N/A

14. Did you speak to a representative on your third call attempt?

Answer No if you weren't able to get anyone on the phone or you got someone on the phone but were unable to talk to them about an appointment date (e.g., connectivity or communication issue).

- Yes
- No
- N/A

15. If no, what was the reason?

- Phone rang for 5 minutes with no answer

- Received voicemail during regular hours (not lunch hour or part of a scheduling process)
- Placed on hold for 15 minutes or navigating phone tree for 20 minutes

- Communication issue or poor connectivity
- None of the above
- N/A

16. Provide details for why you could not speak to someone:

Provide a paragraph of detailed commentary to explain what happened. If you reached voicemail, enter a transcript of the message, including the name of the provider or individual identified in the recording, what information you were asked to leave, etc.

17. Date and time of your third contact attempt:

This is the date and time you called the office a third and final time (if required). Example format: 2/5/2025 1:50 PM

18. Contact_3_Time:

Select AM if you called before 12pm. Select PM if you called 12pm or later.

- AM N/A
- PM

19. Contact_3_Disposition:

Do not answer; CX Group will answer.

- | | |
|----------------------------|------------------------------|
| <input type="checkbox"/> A | <input type="checkbox"/> L |
| <input type="checkbox"/> B | <input type="checkbox"/> M |
| <input type="checkbox"/> C | <input type="checkbox"/> N |
| <input type="checkbox"/> D | <input type="checkbox"/> O |
| <input type="checkbox"/> E | <input type="checkbox"/> P |
| <input type="checkbox"/> F | <input type="checkbox"/> Q |
| <input type="checkbox"/> G | <input type="checkbox"/> R |
| <input type="checkbox"/> H | <input type="checkbox"/> S |
| <input type="checkbox"/> I | <input type="checkbox"/> T |
| <input type="checkbox"/> J | <input type="checkbox"/> U |
| <input type="checkbox"/> K | <input type="checkbox"/> N/A |

20. Did your assigned practitioner offer the care type listed as your scenario?

Answer N/A if you were unable to speak with anyone after the required number of call attempts.

- | | |
|--|------------------------------|
| <input type="checkbox"/> Yes, primary care | <input type="checkbox"/> No |
| <input type="checkbox"/> Yes, outpatient behavioral health | <input type="checkbox"/> N/A |

21. If no, what were you told?

22. Did you obtain an appointment date for your assigned practitioner?

Answer N/A if you were unable to speak with anyone after the required number of call attempts, or the assigned practitioner did not offer the care type listed in your scenario.

- | | |
|------------------------------|------------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> N/A |
| <input type="checkbox"/> No | |

23. If no, why were you not able to obtain an appointment date with your assigned practitioner?

- | | |
|---|---|
| <input type="checkbox"/> Accepting new patients, but appointment date offered with an equivalent provider | <input type="checkbox"/> Not accepting new patients, not offered appointment date with an equivalent provider |
| <input type="checkbox"/> Not accepting new patients, offered appointment date with an equivalent provider | <input type="checkbox"/> Temporarily unavailable, offered appointment date with an equivalent provider |

- Temporarily unavailable, not offered appointment date with an equivalent provider
- Does not accept the assigned insurance
- Is not an in-network provider for the assigned insurance

- Required referral as a prerequisite to get an appointment
- Required more information to get an appointment than I could reasonably provide
- None of the above
- N/A

24. If no, state what you were told:

25. If yes, were you also offered an appointment date with an equivalent provider?

Answer N/A if you were not able to obtain an appointment date for your assigned practitioner.

- Yes
- No
- N/A

26. Equivalent provider's name and specialty:

Example: Dr. Smith, Primary Care. Enter N/A if you were not offered an equivalent provider appointment.

27. If not accepting new patients and not offered an appointment date with an equivalent provider, were you given an estimated time the assigned practitioner would start seeing new patients again or an estimated time to get off a wait list?

Answer N/A if you obtained an appointment date with your assigned practitioner and/or an alternate provider.

- Yes, an estimated time to get off a wait list
- Yes, an estimated time to accept new patients again
- Yes, both an estimated time to get off a wait list and an estimated time to accept new patients again
- No, neither
- N/A

28. If temporarily unavailable and not offered an appointment date with an equivalent provider, were you given an estimated time the assigned practitioner would be available again or an estimated time to get off a wait list?

Answer N/A if you obtained an appointment date with your assigned practitioner and/or an alternate provider.

- Yes, an estimated time to get off a wait list
- Yes, an estimated time to be available again
- Yes, both an estimated time to get off a wait list and an estimated time to be available again
- No, neither
- N/A

29. If an estimated time was given, enter the specific date or timeframe you were told:

For example, 2 weeks, 3 months, 2/15/2025, etc. Enter N/A if you obtained an appointment date, or you were unable to obtain an appointment date and not given an estimated time for when an appointment would be available.

30. Which of the following appointment types were available?

Answer N/A if you were unable to obtain an appointment date with your assigned practitioner and/or an alternate provider.

- In-person only
- Telehealth only
- Both telehealth and in-person
- N/A

31. If both, which appointment type had the soonest available appointment?

If you were given appointment dates with multiple providers, select the type that corresponds to the earliest appointment date you were given.

- In-person
- Telehealth
- N/A

32. Date of the soonest available appointment:

If you were given appointment dates with multiple providers, enter the earliest appointment date you were given. Example format: 2/5/2025

33. If both in-person and telehealth appointments were available, what was the date of the next available appointment?

If the first (soonest) available appointment is in-person, then this is the date of the first (soonest) available telehealth appointment. Example format: 2/7/2025. Enter N/A if both appointment types were not available.

34. Comments:

Enter N/A if you have no additional comments.

35. General_Notes:

Do not answer; CX Group will answer.

36. Time_Elapsed:

Do not answer; CX Group will answer.

37. Compliance_Indicator:

Do not answer; CX Group will answer.

Y

N/A

N

38. Final disposition code:

Do not answer; CX Group will answer.

A

L

B

M

C

N

D

O

E

P

F

Q

G

R

H

S

I

T

J

U

K

QA Verification**39. Enter the doctor you initially requested an appointment with:**

Example: Dr. Jones. If you were unable to speak with anyone after the required number of call attempts, enter N/A.

40. Enter the person you requested an appointment for:

Example: yourself, your child, etc. If you were not asked for this information and did not give it, enter N/A.

41. Enter the reason you gave for why an appointment was needed:

Example: marriage counseling, addiction to pain medication, etc. If you were not asked for this information and did not give it, enter N/A.

42. Enter the insurance company you gave:

If you were not asked for this information and did not give it, enter N/A.

43. Enter the city you gave:

If you were not asked for this information and did not give it, enter N/A.

44. Enter the state you gave:

If you were not asked for this information and did not give it, enter N/A.

45. Enter the zip code you gave:

If you were not asked for this information and did not give it, enter N/A.

46. Enter the county you gave:

If you were not asked for this information and did not give it, enter N/A.

47. Upload a screenshot of each call record:

END OF QUESTIONNAIRE