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. Your assigned scenario (**CS Routine Adult**) is detailed below, along with background information to help guide your call. 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 assigned location & scenario
- Review your shop notes section for list of cities/towns for your assigned location
- Review scenario details & background
- Have your assignment number, location phone number, and have a pen/paper available to note your IVR confirmation code
- Know what information to listen for
- Know how to respond to certain questions

Don't Forget!

- **STARTING SEPT 2026 – NEW IVR Phone Number**
- All call attempts must be conducted & verified through CX group's IVR system
- Call during your assigned timeframe—EST
- Present the correct scenario & background
- Allow for a natural conversation with the agent. Do not lead the conversation for them
- Do not forget to verify the hours of operations
- Do not give out your personal information
- Include detailed narrative to describe your call

General Requirements

- **NEW: Submission Deadline: 9:00 PM EST the same day of your scheduled shop date.** The deadline is noted in eastern standard time. If your completed survey is not submitted to shopperhub.cxgroup.com by the deadline, it will be automatically cancelled.
- 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.
- 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.

Shop Instructions

Logging Your Call Attempts

NEW IVR TOLL FREE NUMBER & INSTRUCTIONS BELOW - SEPTEMBER 2026

For this shop assignment, you must log all your call attempts through our IVR system. Below are instructions to call and log your attempts. Our Quality Assurance team will validate that you called the correct location and the time(s) of your call(s).

Make sure to have your assignment number, your Shopper ID, location phone number and information, a pen/paper to note your confirmation code, and the IVR phone number listed below.

- Call CX Group's IVR phone system at **888-786-4874** (toll free).
- Once you dial into the IVR system, you will be prompted to enter your assignment number. This can be found on your shop confirmation. Only enter the first series of numbers. For example, if your assignment number is 2089568-3658147, you would enter 2089568.
- After entering your assignment number, the system will check to see if the caller identification matches the telephone number listed on your shopper account. If the telephone number matches, you will automatically get connected to your assigned location's phone number.
- In the event the caller identification does not match, you will be prompted to enter your 7-digit Shopper ID. If your Shopper ID matches with the assignment, you will be automatically connected to your assigned location's phone number.
- **If you receive a recording/voicemail, the call is disconnected, or you get a busy signal, hang up and call back later the same day (all call attempts must be recorded through the IVR).**
- You will get an IVR confirmation number during your call. Write down the number and enter it in your report. You will NOT be able to submit your survey without this number.
- **There may be brief pauses between each step of the IVR, do not hang up unless you encounter one of the situations noted above.**

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 a phone tree is required for your shop, follow the assigned prompt numbers noted in the **NOTE** section on your shop confirmation page instructions to reach the correct agent.
        - **You MUST in your report all the prompts you selected.**
    - 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 BestMark or your scheduler immediately.

    - **Keep note if the phone was picked up by live person within 6 or less rings.**
- 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 after 10 minutes you are still on hold, hang up the phone. Make a second attempt.**
- 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 within the NOTES section of your shop 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?
        - **Be sure document the name of the agent who assisted you AND the CBHC name provided by the agent. If the agent does not proactively provide his/her name during the call, you must ask for it toward the end of the call.**
    - 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.
        - **If the agent does NOT confirm the location, you MUST discreetly follow up to confirm you have reached the right location.**

Present your assigned scenario – CS Routine Adult

- You are calling to get some help. You have been having a hard time sleeping due to some trauma history that is coming up. It was triggered by a few incidents at work with your boss and you really want some help. You have not seen anyone in about 10 years, but it is getting bad and you need help before it gets any worse.
- As part of your scenario you must say, " What is your soonest appointment? "
    - This is the only prompt you should provide for the agent.
- Respond with background information if necessary—do not offer this information, but respond appropriately if the agent asks:

    - If they try to schedule an appointment, say you need to check your work schedule and will call them back.
    - Your insurance is MassHealth, but do not have the details on me.
- 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:
    - Do they offer walk-in availability today or tomorrow?
    - Do they offer a visit within 48 hours?
    - Do they offer an appointment within 72 hours?
    - Do they offer an appointment within 14 days?
    - 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. Be sure to document the hours of operation provided.**
    - 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, and say you will think about/discuss it with your (your family member/significant other/etc.) tonight.
- 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.
- **Confirm the hours of operations. If not provided, be sure to ask towards the end of your call.**
    - **You MUST document the hours of operations.**
- 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.
    - **Please note that "emergency services" are NOT the same as emergency department.**

Thorough narratives are required throughout each section of your survey.

- Use the narrative boxes within 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.
- Justification for all of the scores you selected for each section of the survey.

carelon Behavioral Health

BESTMARK

CS ROUTINE

Location 123 Main Street
N/A, NY 12345

Shop Details

Shop Date		Shop Day	
Start Time		End Time	
Dispatch ID	5704251	Shop Type	CCRG190

Phone Call Evaluation

Please detail the exact scenario you presented during this call:

Date of your call:

Time of your call:

Please be sure document the prompts you selected in order to get to a live agent.

Was the phone picked up by a live person in 6 or less rings?
- ○ 6 or less rings before connecting with a live person
- ○ 7-11 rings before connecting with a live person
- ○ 12+ rings before connecting with a live person
- ○ No answer

0 / 10

How many times were you put on hold for longer than 30 seconds?
- ○ I was not or only put on hold 1 time for longer than 30 seconds
- ○ 2 or more times
- ○ N/A

0 / 3

How many times were you transferred and had to repeat the scenario/story?
- ○ I was not transferred or only transferred 1 time and/or had to repeat the story
- ○ 2 or more times
- ○ N/A

0 / 3

Explain the responses you provided above, including the prompts selected to get to an agent:

Did your reach a live person who could provide you with the needed information? ○ Yes ○ No

0 / 15

Were you told to call another number? ○ Yes ○ No ○ N/A

0 / 5

At any point, did an associate state they have to/need to call you back? ○ Yes ○ No ○ N/A

0 / 10

Were you transferred to voicemail? ○ Yes ○ No ○ N/A

0 / 5

Explain the responses you provided above, including If you were told to call a number, what was the number given and reason you were told to call:

Please be sure document the name of the agent who assisted you AND the CBHC name provided by the agent.

Did the agent tell you their name? ○ Yes ○ No ○ N/A

0 / 3

Did the agent identify their location (clinic name) and identify their organization as a "CBHC"? ○ Yes ○ No ○ N/A

If not as their CBHC name, please detail how they titled their agency:

If not provided, please be sure ask the agent for the hours of operation. Please note that a response of 'Open 24/7' is not an acceptable response.

What were the hours of operation provided?
- ○ Hours provided were within 8am-8pm weekdays AND 9am-5pm weekends (at MINIMUM)
- ○ Hours provided were LESS THAN the minimum OR by appointment only OR unable to provide
- ○ N/A

0 / 7

Explain the responses you provided above, including the name of the agent who assisted you, the CBHC name, AND the operation hours provided:

Please indicate each of the following the agent mentioned during your conversation (v1)	☐ Agent states they offer walk in availability today or tomorrow ☐ Agent states they offer a visit within 48 hours ☐ Agent state they offer a appointment within 72 hours ☐ Agent states they offer an appointment within 14 days ☐ N/A ☐ None of the above	0 / 10
Did the agent inform you that you would be put on a waiting list for your appointment?	○ Yes ○ No ○ N/A	0 / 10
Please note that "emergency services" is NOT the same as emergency department .		
Did the agent recommend going to the emergency department or to tell you to call 911?	○ Yes ○ No ○ N/A	0 / 15
Did the agent recommend being seen by crisis services? (NOT just INFORMATION about crisis services, but telling you that you NEED to be seen by crisis)	○ Yes ○ No ○ N/A	0 / 5
Explain the responses you provided above, including what was mentioned for appointment availability and any recommendations the agent stated:		