

DSHS Grand Rounds

Oct. 22

Mystery Shopping in Healthcare Yields "Aha Moments"

Presenters: Garrett Craver, Spindletop
MHMR; David Lloyd, MTM Services;
Melissa Brown, DSHS; Kellye Mixson,
RN, DSHS



Logistics

Registration for free continuing education (CE) hours or certificate of attendance through TRAIN at:

<https://tx.train.org>

Streamlined registration
for individuals not requesting CE hours
or a certificate of attendance

1. webinar: <http://extra.dshs.state.tx.us/grandrounds/webinar-noCE.htm>
2. live audience: sign in at the door

For registration questions, please contact Laura Wells, MPH at
CE.Service@dshs.state.tx.us

Logistics (cont.)

Slides and recorded webinar available at:

<http://extra.dshs.state.tx.us/grandrounds>

Questions?

There will be a question and answer period at the end of the presentation. Remote sites can send in questions throughout the presentation by using the GoToWebinar chat box or email GrandRounds@dshs.state.tx.us.

For those in the auditorium, please come to the microphone to ask your question.

For technical difficulties, please contact:

GoToWebinar 1-800-263-6317(toll free) or 1-805-617-7000

Disclosure to the Learner

Requirement of Learner

Participants requesting continuing education contact hours or a certificate of attendance must register in TRAIN, attend the entire session, and complete the online evaluation within two weeks of the presentation.

Commercial Support

This educational activity received no commercial support.

Disclosure of Financial Conflict of Interest

David Lloyd owns and manages MTM Services. Garrett Craver serves as a consultant for iCentrix. The remaining speakers and planning committee have no relevant financial relationships to disclose.

Off Label Use

There will be no discussion of off-label use during this presentation.

Non-Endorsement Statement

Accredited status does not imply endorsement by Department of State Health Services - Continuing Education Services, Texas Medical Association, or American Nurses Credentialing Center of any commercial products displayed in conjunction with an activity.



David Lakey, MD
DSHS Commissioner
is pleased to introduce our
DSHS Grand Rounds speakers

Mystery Shopping in Healthcare Yields "Aha Moments"



David Lloyd, MTM Services

Garrett Craver, Spindletop MHMR



Melissa Brown, DSHS

Kellye Mixson, RN, DSHS



Learning Objectives

Participants will be able to:

- Explain the rationale for incorporating mystery shopping into the delivery of healthcare services.
- Describe the tools and evidence-based practices used in mystery shopping.
- Examine healthcare case studies employing mystery shopping.

Customer Service Essentials



David Lloyd, Founder
M.T.M. Services

P. O. Box 1027, Holly Springs, NC 27540

Phone: 919-434-3709 Fax: 919-773-8141

E-mail: david.lloyd@mtmservices.org

Web Site: mtmservices.org

Cornerstones of a Value Based Group Health Care Practice Based Service Delivery System

**Integrated
Delivery System**

**Access and Service Capacity
Enhancement**

**Resource Management/
Practice Management**

**Customer Service
and Image Building**

Important Questions That Assess the Level of Support for Excellent Customer Service

- Does your center have a customer service based key performance indicator for all staff?
- Does your center evaluate each staff on their customer service capabilities in their individual annual performance evaluations?
- Does your center employ mystery shoppers model to confirm level of customer service being provided?
- Does your center have an image building/marketing/public information plan in place?

Important Questions That Assess the Level of Support for Excellent Customer Service

- Over 600 people attended the national customer service webinar in October 2013
- Poll Questions and Results:
 - Does your center have a customer service based key performance indicator for all staff? **NO – 63%** YES – 37%
 - Does your center employ mystery shoppers model to confirm level of customer service being provided? **NO - 82%** YES – 18%
 - How often does your center send Referral Source Satisfaction Surveys to all sources of referral? **NEVER – 50%** QUARTERLY – 14% ANNUALLY – 36%
 - How often does your center measure customer/client satisfaction? **NEVER – 6%** QUARTERLY – 45% ANNUALLY – 49%

Core Customer Service Questions

1. Are the staff primarily focused on serving the “system”, or serving the individual presenting for care that the system was originally designed to serve?
2. How is the internal staff to staff or program to program customer service working?
3. What is the level of internal “system noise” that takes your staff’s attention daily?
4. Is the focus more on resolving the noise/crisis model for internal staff or more on how the staff can meet the needs of “customers” today?

Internal Customer Service Vs. External Customer Service

1. Where internal customer service challenges are prevalent we have found that a consistent focus on external customer service is challenging if not impossible

2. If there are internal customer service challenges (i.e., members of the management team are “bickering”) this is a solution:

“If you had complete control of your budget, would you purchase services from your other management team members (from your other agency teams)?”

Customer Service Focus Summary

It's Not My Job" Focus	Client Focus	Customer Focus
1. Individuals served are not the focus of my work	1. Individuals are not empowered	1. Individuals are fully empowered
2. The needs of individuals served are "not in my job description"	2. Individuals usually don't know what they need	2. Individuals know what they want and need
3. Where will individuals served go if they don't go here	3. Individuals have little or no choice	3. Individuals have choices
4. Individuals served are here because they have to be here	4. Individuals are here to receive treatment	4. Individuals are here to participate in their recovery
1. It is not my job!	2. They need us!	3. We need them!

Core Staff Attitude Attributes Essential for Customer Service

1. Positive - We can do this...
2. Respectful
3. Responsive
4. Cooperative
5. Creative
6. Flexible
7. Responsible
8. Adaptive
9. Low crisis levels
10. Willing to be cross-trained
11. Professional in approach and in dress/appearance

Core Elements for Customer Service

- **Waiting Area Needs**
 - Clean and orderly – no clutter
 - Current magazines with full covers
 - Light bulbs in the lamps
 - Comfortable chairs
 - Privacy needs
 - Children/Adolescent needs
- **Signage - Need to Facilitate Movement of Consumers**
 - The “Three Question Rule”
 - Professional thematic signage - logo and color scheme

Core Elements for Customer Service

- Eye to Eye Contact
 - Please don't look above the person's face, beside the person's face or beneath the person's face
 - Looking into the eyes of the customer will provide you with important information about how your efforts to provide customer service are going
- The Value of A Smile
 - MOST IMPORTANT ATTRIBUTE
- Acknowledging Arrival of Consumer
 - National Customer Service Standard is within 10 seconds
 - Staff meetings at the reception desk model

Core Elements for Customer Service

- Answering the Phone and Telephonic Standards
 - Answer by the second ring
 - Do not leave a person on hold more than 30 seconds without re-empowering them
 - Have standard scripts for all persons who answer the phone for the center
 - Voice mail protocols to ensure responsive customer service instead of a customer service dumping ground

“Five Sensing” Based Customer Service Assessment

1. What did the premises **look like** – was the parking lot clean, striped and manicured; was the front door glass clean and easily opened; was there adequate signage/information to help direct the customer to the appropriate place, etc.?
2. What did the premises **smell like** – were there unpleasant odors; did the restrooms smell clean; were there musky smells in the offices; etc.?
3. What did the premises **touch like** – was the furniture sticky or dirty; was the pen we provided to fill out a form clean; were the magazines in the waiting room fresh and crisp or worn out; were the fixtures in the restrooms clean and shiny; etc.?

“Five Sensing” Based Customer Service Assessment (cont.)

4. What did the premises **sound like** – was there a sense of crisis; was there verbal disagreement evident; was there soothing background music; was there music and information when the individual served called and was placed on hold; etc.
5. What did the premises **taste like** – was the coffee offered to the individual served fresh and in a clean cup; were there adequate refreshment/snacks available; etc.

Customer Service Action Plan

Service Area/Opportunity	Typical Customer Service Concerns	Solution Options
1. Telephone Access:		
<ul style="list-style-type: none"> • Number of Rings 		
<ul style="list-style-type: none"> • Greeting/Friendliness 		
<ul style="list-style-type: none"> • Time On Hold/Re-Empowerment 		
<ul style="list-style-type: none"> • Background Music/Information 		
<ul style="list-style-type: none"> • Transfer Levels to Staff 		
<ul style="list-style-type: none"> • Protocol for Voice Mail Responsiveness 		
2. Physical Facility:		
<ul style="list-style-type: none"> • Identification Signage 		
<ul style="list-style-type: none"> • Parking Adequate/Clean 		
<ul style="list-style-type: none"> • Landscaping/Flowers/Lawn Maintenance 		
<ul style="list-style-type: none"> • Entrance Clean, Easy to Locate, and ADA Accessible 		
<ul style="list-style-type: none"> • Ease of Opening Door(s) 		
<ul style="list-style-type: none"> • Lobby Area Appearance/Capacity 		
<ul style="list-style-type: none"> • Magazines, Artwork, Furniture & Carpeting 		
<ul style="list-style-type: none"> • Registration/Front Desk Accessibility & Hospitality 		
<ul style="list-style-type: none"> • Restrooms – Availability/Cleanliness 		
<ul style="list-style-type: none"> • Signage – Adequate, Clear & Positive 		
<ul style="list-style-type: none"> • Background Music 		

Customer Service Action Plan

Service Area/Opportunity	Typical Customer Service Concerns	Solution Options
3. Reception/Intake Staff:		
<ul style="list-style-type: none"> • Politeness/Attentiveness/Responsiveness 		
<ul style="list-style-type: none"> • Professionalism/Boundaries/Language Skills/Communication Skills 		
<ul style="list-style-type: none"> • Customer Service Empowerment Level 		
<ul style="list-style-type: none"> • Terminology/Acronyms Utilization 		
<ul style="list-style-type: none"> • Consumer Recognition Wait Time 		
<ul style="list-style-type: none"> • Re-Empowerment Wait Time Protocols 		
<ul style="list-style-type: none"> • Knowledge of Services/Staff 		
<ul style="list-style-type: none"> • Level of Client Wait Time in Lobby 		
4. Access to Care:		
<ul style="list-style-type: none"> • Single Number for Access 		
<ul style="list-style-type: none"> • After Hours Clinical Triage Capacity 		
<ul style="list-style-type: none"> • Clinical Staff Availability 		
<ul style="list-style-type: none"> • Consistency of Screening/Triage 		
5. Intake Process:		
<ul style="list-style-type: none"> • Wait Time from call/walk in to Intake 		
<ul style="list-style-type: none"> • Efficiency of Financial Intake 		
<ul style="list-style-type: none"> • Number of Client Signatures Required 		
<ul style="list-style-type: none"> • Number of Forms to be completed by Client 		
<ul style="list-style-type: none"> • Number of No Shows 		
<ul style="list-style-type: none"> • Satisfaction Surveys for Access/Intake Process for Shows and No Shows 		

Customer Service Action Plan

Service Area/Opportunity	Typical Customer Service Concerns	Solution Options
5. Intake Process (continued):		
<ul style="list-style-type: none"> • Access to Clinician 		
<ul style="list-style-type: none"> • Efficiency of Clinical Intake 		
<ul style="list-style-type: none"> • Number of Forms Utilized in Intake 		
<ul style="list-style-type: none"> • Number of Questions Asked of Client 		
6. General Customer Service:		
<ul style="list-style-type: none"> • Efficiency of Scheduling Next Appointment 		
<ul style="list-style-type: none"> • Managing Customer/Consumer Service Complaint Protocols 		
<ul style="list-style-type: none"> • Information on Center-wide Services 		
<ul style="list-style-type: none"> • Confidentiality Concerns 		
<ul style="list-style-type: none"> • Meeting Special ADA, Language, & Cultural Diversity Needs 		
<ul style="list-style-type: none"> • Brochures, Newsletters & Information Bulletin Boards 		
<ul style="list-style-type: none"> • Information/Linkage to Community/Self-Help Supports 		
<ul style="list-style-type: none"> • Ability of Organization to Listen to Consumer/Customer and Change Organizational Behavior 		
<ul style="list-style-type: none"> • Timely and Accurate Client Billings 		
<ul style="list-style-type: none"> • Follow up Visit Customer Satisfaction Phone Calls 		
<ul style="list-style-type: none"> • Mystery Visitor Program Participation 		
<ul style="list-style-type: none"> • Customer Service Focus at All Meetings 		

Referral Source Customer Satisfaction Survey Model

Thank you for contributing to our efforts to provide better services. Your thoughts, experiences and suggestions will be a valuable part of the on-going efforts to provide consumer-centered, cost-effective, accessible and quality services. Please check the appropriate response for each survey questions.

1. When your organization's staff communicates with and/or visits the Center, do they overall feel valued?
 Always (4) Most of the Time (3) Seldom (2) Never (1)
2. Does your staff encounter inappropriate delays when they write our service centers?
 Never (4) Seldom (3) Most of the Time (2) Always (1)
3. Does your staff encounter inappropriate delays when they call our service centers?
 Always (1) Most of the Time (2) Seldom (3) Never (4)
4. When your organization refers consumers to our Center are we responsive to your referral needs?
 Never (1) Seldom (2) Most of the Time (3) Always (4)
5. Do you receive both timely and adequate document support for your referrals?
 Always (4) Most of the Time (3) Seldom (2) Never (1)
6. Have you received an adequate level of communication from our Center regarding service opportunities/locations?
 Never (1) Seldom (2) Most of the Time (3) Always (4)
7. Have our services improved the quality of life of consumers your organization has referred?
 Always (4) Most of the Time (3) Seldom (2) Never (1)
8. Would your organization recommend our services to another referral source, organization, family member or individual?
 Never (1) Seldom (2) Most of the Time (3) Always (4)
9. Please provide any additional comments, information or suggestions that you feel will help our center provide enhanced customer service:

Presented By:
David Lloyd,
MTM
Services

Consumer Satisfaction Focus Group Survey

Thank you for contributing to our efforts to provide better services. Your thoughts, experiences and suggestions will be a valuable part of the on-going efforts to provide cost-effective, accessible and quality services. Please check the appropriate response for each survey questions.

1. When you visit the Center, do you feel like an important guest?
 Always (4) Most of the Time (3) Seldom (2) Never (1)
2. When you come to the center do you receive what you need to help you?
 Never (1) Seldom (2) Most of the Time (3) Always (4)
3. Have our services improved your quality of life?
 Never (1) Seldom (2) Most of the Time (3) Always (4)
4. Do you have to wait in the lobby a long time to see your care provider (physician, therapist, or case manager)?
 Always (4) Most of the Time (3) Seldom (2) Never (1)
5. Does your care provider share with you what you need to do to actively share in your recovery?
 Never (1) Seldom (2) Most of the Time (3) Always (4)
6. Do you understand the recovery suggestions that your care provider gives you?
 Always (4) Most of the Time (3) Seldom (2) Never (1)
7. Do you have to wait a long time to get an appointment with your care provider?
 Never (1) Seldom (2) Most of the Time (3) Always (4)
8. Are the restrooms clean in the Center?
 Always (4) Most of the Time (3) Seldom (2) Never (1)
9. Are there enough signs at the Center to help you find the services or staff you need to find?
 Never (1) Seldom (2) Most of the Time (3) Always (4)
10. Would you recommend our services to a friend or family member?
 Always (4) Most of the Time (3) Seldom (2) Never (1)

What do you tell your customers?

Ben Gordon Center
Consumer Satisfaction Questionnaire

When you evaluate our services, you give us more than just your opinion. You give us the tools we need to build a more responsive service system. So please tell us how you feel about our service to you. We will study your comments, and we will direct our attention to meet your needs. We are committed to your satisfaction!

Please indicate your agreement or disagreement with each of the following statements by filling in the circle that reflects your opinion.

Thank you for completing this survey!

Response Definition: SD=Strongly Disagree D=Somewhat Disagree N=No Opinion A=Somewhat Agree SA=Strongly Agree

	SD	D	N	A	SA
1. The waiting time until my first appointment was reasonable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Reception staff were courteous and helpful.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. The facilities (reception areas, therapy rooms, etc) were accessible, clean and comfortable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. I have improved as a result of the services I received.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. I would recommend the Ben Gordon Center to a friend.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Comments:	<div style="border: 1px solid black; height: 100px; width: 100%;"></div>				

Name (optional): _____
Counselor's Name (optional): _____

Presented By:
David Lloyd,
MTM Services

References

- *Lloyd, David. “How to Deliver Accountable Care” – Chapters 9 & 10. Washington, DC: National Council for Behavioral Health, 2003.*
- *Lloyd, David, et. al. “Operationalizing Health Reform” – Chapters 12 & 13. Washington, DC: National Council for Behavioral Health, 2013.*
- *Guidelines on Mystery Customer Research. (2003 March). Market Research Society. www.mrs.org.uk/standards/downloads/revised/active/Mystery%20shopping%20guidelines.pdf.*
- *Health Care Taps 'Mystery Shoppers': To Improve Service, Hospitals and Doctors Hire Spies to Pose as Patients and Report Back. Wang, Shirley. (2006, August 8). The Wall Street Journal.*

Presented By:
David Lloyd, MTM Services

Customer Service in a Community Behavioral Health Center

Garrett Craver, M.Ed, MBA, LPC Supervisor
Director of Clinical Outcomes
Spindletop Center



Spindletop Center Clinic System

- ▶ 5 Outpatient Clinics, 1 Primary Care and 1 Specialty Care
- ▶ 60,000 Clinic Visits Annually
- ▶ 5+ Physicians-Mix of Full and Part Time Faculty
- ▶ ~500 Total Staff
- ▶ Clinics Reviewable by Centers for Medicare and Medicaid Services (CMS), Texas Department of State Health Services (DSHS) & The Joint Commission
- ▶ Clinic Management Model Requires Collaboration between Hospitals, Schools, and Various Community Partners
- ▶ Wide Service Array

Customer Service at Spindletop Center

- History as a Teacher
 - Mystery Customer Calls
- Who Owns Customer Service?
- Getting Organized
- Buy-In
- Voice of the Customer

Why Focus on Customer Service?

- Competition
- Revenue and Finance
- Texas Administrative Code
- Reputation/Marketing
- Most Important... "It's the Right Thing to Do"

Core Components of Customer Service

- ▶ Leadership
- ▶ Service Goals and Expectations
- ▶ Responsibility and Accountability
- ▶ Communication
- ▶ Education
- ▶ Service Recovery
- ▶ Reinforce Behaviors
- ▶ Measure Satisfaction
- ▶ Action Planning

Education and Training

- Ritz Carlton Model
- Consumer and Family Centered Care & Recovery Model
- Clinic Front Desk Training
- Interpret Survey & Call Results
- Action Planning-It Takes a Team

Measurement Tools

- Clinic Surveys
- Mystery Customer Calls
 - QM Consortia
 - DSHS
- Mystery Shopper

The Good, The Bad, and The Ugly

- Examples of Less Than Desirable Practices
- Examples of “Works in Progress”
- Examples of Great Successes

Consumer Expectations in Clinics

- ▶ The Visit Through the Eyes of the Consumer
- ▶ Greeting and Welcome
- ▶ Wait Times-Waiting Room and Exam Room
- ▶ Provider Encounter
- ▶ Clinic Environment
- ▶ Technology

Speaking of Technology...

- Phones and Phone Management
- Smart Phones
- Email
- Social Media
- Telemedicine
- EMR/HIE

New- Consumer Portal

- ▶ Book Clinic Appointments 24/7
- ▶ View Previous Appointments
- ▶ View Lab Results
- ▶ View Medical Record
- ▶ Communicate with Provider
- ▶ Receive Appointment Reminders
- ▶ Prescription Refill Requests
- ▶ Consumer Education Material

Strategies for Customer Service to Improve Consumer Satisfaction

- Communication with Consumers
- Front Line Staff Training and Engagement
 - 1x Month
 - Customer Service Team
- Professional Staff Training
- Other Tools

Communication with Consumers

- ▶ Appointment Delays-Be Honest and Timely
- ▶ Reminders
- ▶ Cancellations/Rescheduling
- ▶ Utilize Wait Time
- ▶ No Surprises-Don't "Blindside" Consumers
- ▶ Consumers Care about Their Care

Front Line Staff Training and Engagement

- Consumer Satisfaction-Incorporate into Performance Evals
- Phone "Scripting"
- Phone Etiquette- "Smile over the phone"
- 5/10 Rule
- Body Language
- Manage Up
- Appropriate Attire and Appearance
- Partner with the Consumer
- Be a Resource

Professional Staff Training

- Review Clinic Schedules/Appointment Access
- Distribute and Review Staff-Specific Consumer Satisfaction Scores
- Annual Training-Mandatory
- Allow Flexible Appointments

Other Tools

- ▶ E- Signage & Conventional Signage in Clinics
- ▶ Share Best Practice in Clinic Staff Meetings
- ▶ Do Follow-Up Phone Calls
- ▶ Review Clinic Space for Best Workflow
- ▶ Clinic Environment-Art, PCs, Clean, and Safe
- ▶ Stand Behind Your “Brand”
- ▶ Innovate

Why Customer Satisfaction Is a Practice, Program & Philosophy

- Recent Mystery Shopper Audit
 - Showed areas of concern
- Process of Correcting Issue
- New Center Mystery Shopper Program!
- Must Never Become Complacent!

Suggested Readings

- Studer, Q. Hardwiring Excellence: Purpose, Worthwhile Work, & Making a Difference. Gulf Breeze, FL: Firestarter Publishing; 2004.
- Woodcock, EW. Front Office Success: How to Satisfy Consumers and Boost the Bottom Line. Englewood, CO: MGMA; 2010.
- Woodcock, EW. Mastering Patient Flow: Using Lean Thinking to Improve Your Practice Operations. Englewood, CO: MGMA; 2007.
- Lee, F. If Disney Ran Your Hospital: 9 ½ Things You Can Do Differently. Bozeman, MT: Second River Healthcare Press; 2004.
- Meek, KA. Customer service in health care: optimizing your consumer's experience. King County Medical Society Bulletin. 2010;89(6):1-5.
http://pacificmedicalcenters.org/images/uploads/KCMS_Customer_Service_in_Healthcare.pdf
- Scott G. The six elements of customer service: achieving a sustained, organizationwide commitment to excellence improves customer and employee satisfaction. Healthc Exec. 2013;28(1):64-7.
- 8 Customer Service Ideas to Enhance Consumer Satisfaction. MGMA In Practice Blog. <http://www.mgma.com/blog/8-customer-service-ideas-to-enhance-patient-satisfaction> Published March 2010.

Department of State Health Services

Mystery Shopper Project



Melissa Brown, DSHS



Kellye Mixson, RN, DSHS

Mystery Caller/Shopper Project
Melissa Brown, MBA
Kellye Mixson, BSN
October 22, 2014

Mystery Caller and Shopper Project Objectives

Assess access to routine services

- Identify rule violations
- Assess customer service



Project Background

- Community members
- Administrative
- Deemed high priority
- Planning phase
 - Assemble team
 - Develop tool
 - Build reports



Mystery Caller Phone Call



Quality Management Tools

- Brainstorming
- AIM
- Charter
- Work plan
- Process Mapping
- Tool development

Methodology

- Clinicians- Scenarios
- Data Experts- Analyze data, reports, randomize assignments
- MH Policy Workgroup
- Team Leads- Oversee project and workgroup, Develop Mystery Caller tool

Tool Question Example

You were denied access to services for the following reasons:

- Substance Use**
- Mental Health Diagnosis**
- Age**
- Medication**

Mystery Shopper

- Monthly shopper visits to DSHS funded Mental Health and Substance Abuse treatment providers
- 23 visits
- 48% Access



Mystery Shopper

- Barriers
 - Signage
 - Lack of privacy
 - Identification
 - Wait time
- Open Access
 - Immediate screening
 - Follow up appointment
 - Referrals

Access to Services

- Measured in three ways:
 - Appointment
 - Walk in specific days/time
 - Walk in anytime

2013 Access to Services

Provider	Total Calls June- November 2013	Number of Calls Resulting in Access	Number of Calls Resulting in No Access to Services	Average Percentage of Access to Services	Average Percentage of No Access
LMHA and NorthStar Providers	277	168	109	61%	39%

2014 Access to Services

Provider	Total Calls	Number of Calls Resulting in Access	Number of Calls Resulting in No Access to Services	Average Percentage of Access to Services
LMHA and NorthStar Providers	351	239	112	71%
OSAR Providers	39	29	10	73%

2013-2014 Access Comparison

Provider	2013 Access	2014 Access	Improvement
LMHA and NorthStar	61%	71%	10%
OSARs	No data	73%	

Toll Free Number

25 TAC 412.111

Provider Type	Total Providers	February-May 2014 Total of Providers with a Toll Free Number	June-August 2014 Total of Providers with a Toll Free Number	Improvement
LMHA and NorthStar Providers	46	25	29	4
OSAR Providers	13	10	10	none

Automated System

25 TAC 412.314

Provider Type	Total Providers	Feb-May 2014	June-Aug 2014	Improvement
LMHA and NorthStar	46	23	25	None
OSARs	13	3	8	None

Automated System Customer Service Impact

- Automated systems can create barriers to accessing services by:
 - Multiple prompts and selections can be confusing
 - Some systems do not allow callers to leave a message for a return call
 - Some callers never receive a call back
 - Some messages last 2 minutes before giving an option to connect to a live person
 - No Spanish option

Accountability

25 TAC 412.105

Provider Type	Total Providers	2013 Data	Feb-May 2014	June-Aug 2014	Improvement
LMHA and NorthStar	46	7	3	0	100%
OSARs	13		No data	0	

Accountability Associated Barriers

- Individuals are denied due to:
 - lack of a social security card
 - lack of photo ID
 - lack of proof of residence
 - lack of Medicaid number

Screening and Assessment

Provider Type	Total Providers	Feb-May 2014	June-Aug 2014	Improvement
LMHA and NorthStar	46	32	28 providers	9%
OSARs	13	3	6	none

Mystery Caller Project Value

- Education on rule and contract requirements
- Awareness of customer service

FY 2013-2014 Outcomes

- 5 Centers reached out for Individual Technical Assistance during FY 2013
- 5 Centers reached out for Individual Technical Assistance during FY 2014
- 4 out of 47 LMHA and NorthStar providers developed a toll free number for routine services in FY 2014
- Access increased by 10% from FY 2013-2014
- Providers achieved 100% compliance with the Accountability rule in the last half of 2014

Ethical Concerns

- Taking up the provider's time
- Holding up appointments for clients
- Shopper- face to face, see other clients, MHSA employees trained on HIPPA
- DSHS safeguards

Future of Mystery Caller

- Continue Mystery Calls
- Connect calls with a mystery caller visit
- Focus on low performers
- Concentrate on Customer Service
- Calls to satellite offices

Questions and Answers



Mike Maples
Deputy Commissioner, DSHS

Remote sites can send in questions by typing in the *GoToWebinar* chat box or email GrandRounds@dshs.state.tx.us.

For those in the auditorium, please come to the microphone to ask your question.

Our Next Grand Rounds

Oct. 29

Using Modern Genetic Tools to Understand Clinical Unknowns

Presenter: Richard Finnell, PhD,
Director, Genomic Research, Dell
Children's Medical Center

