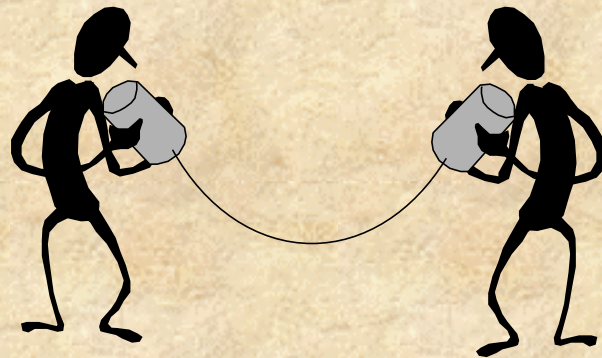


# New Options for Consumer Involvement



# How to Conduct a Mystery Shopper Assessment (MSA)



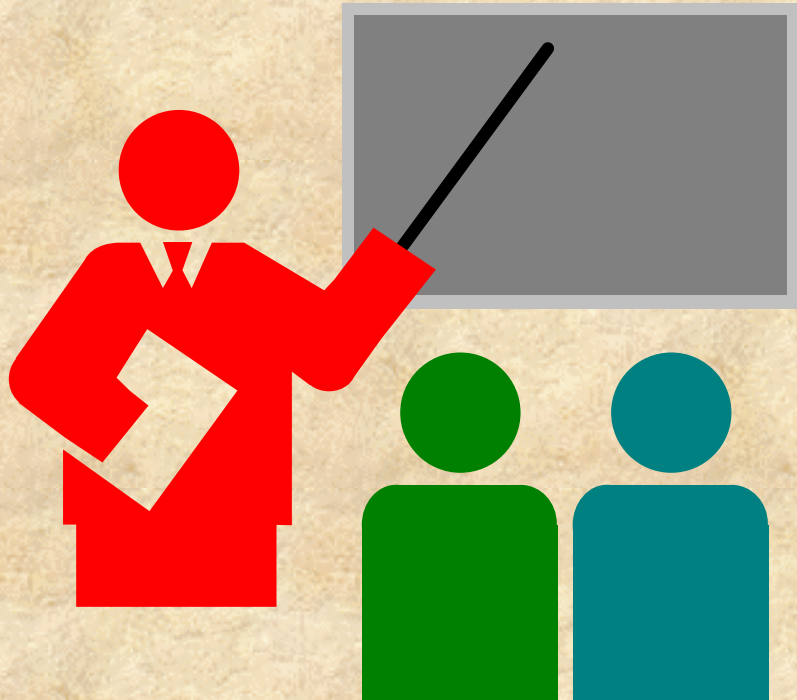
*Are Consumers Getting the Treatment  
They Deserve?*

# Why do a Mystery Shopper Assessment?

- Reason for doing
- Benefits
- The missing piece in the consumer movement

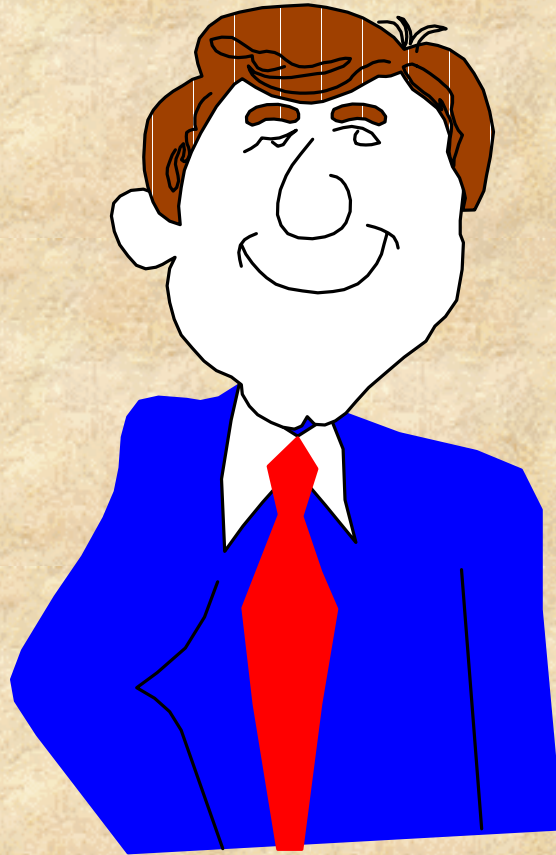


# Determining Objectives



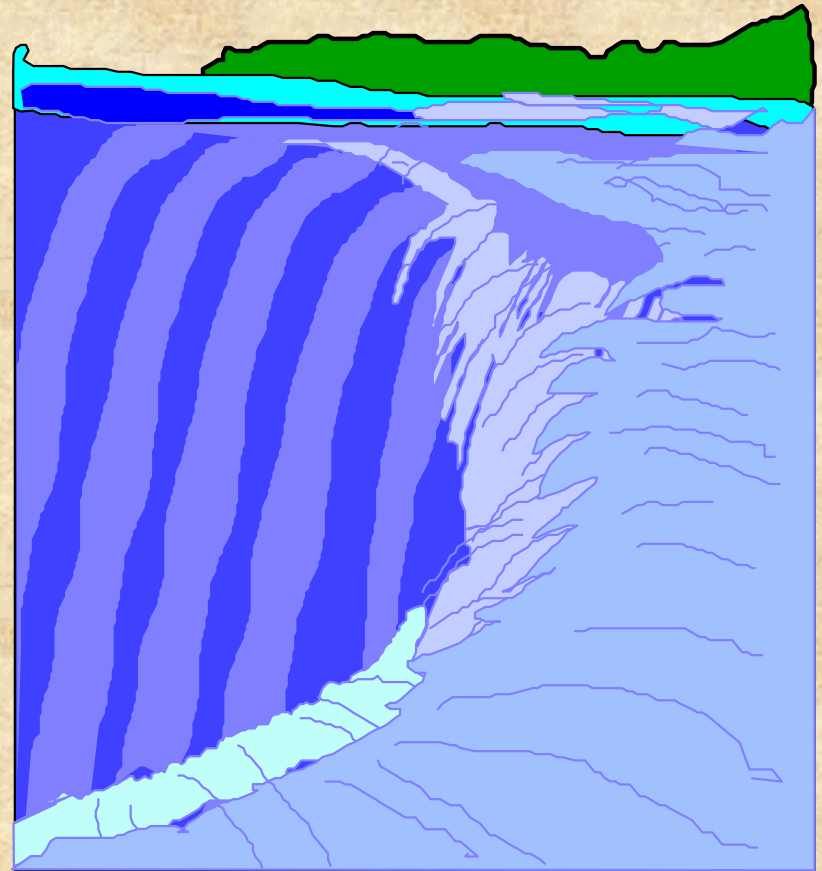
- What do you hope to learn
- Understand the components of and reason for the MSA
- Know how to do a MSA
- Trainer training for staff

# What Is Good Customer Service?

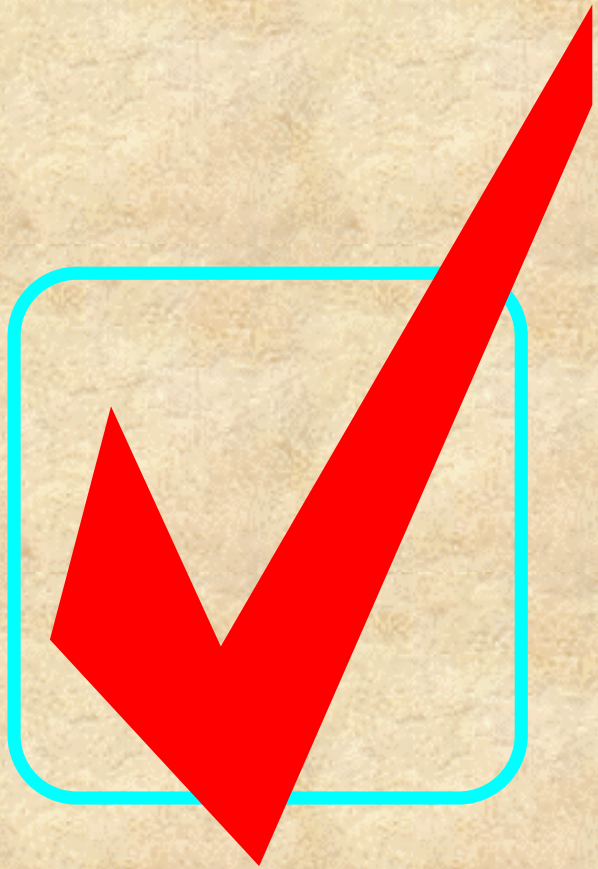


# Flow

- What are Mystery Shopper Assessments?
- What calls like?
- How can we conduct our own Mystery Shopper Assessment?
  - Consumer role
  - Staff role as trainers

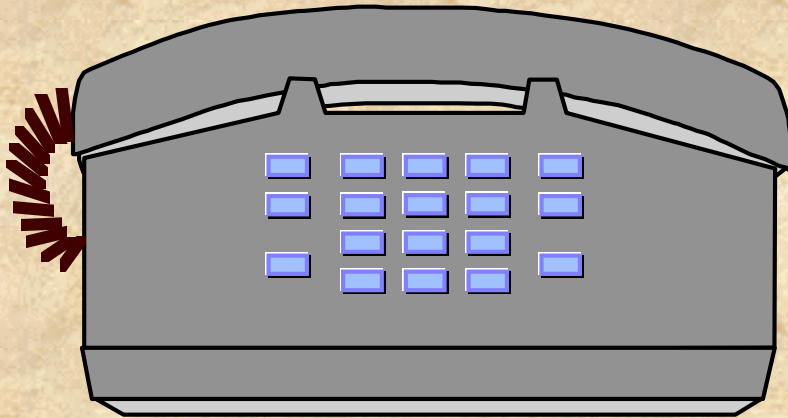


# Components of Mystery Shopper Assessment



- Telephone access:
  - Caller in consumer role
  - Variety of life situations, problems
- In-person access
  - Inspect and observe
  - Consumer role

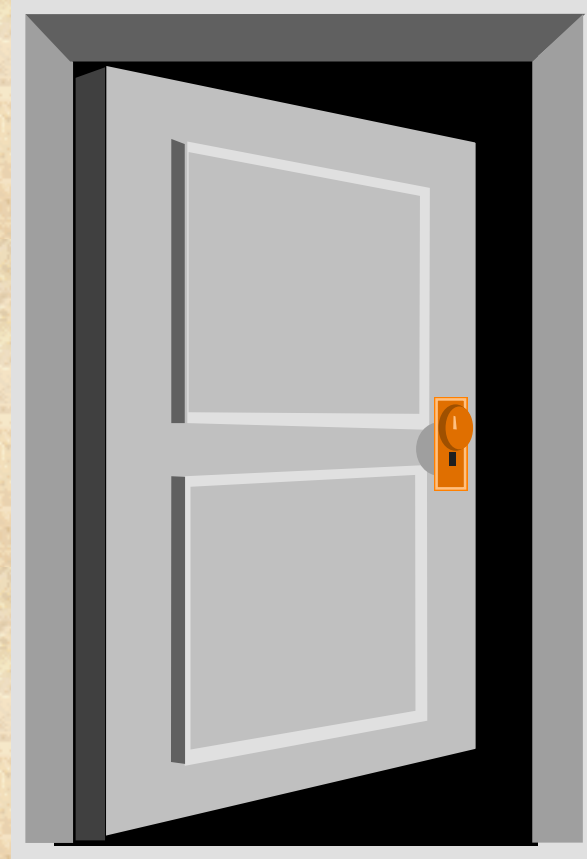
# Telephone Access Criteria: Partial Listing



- Number rings; on hold
- Telephone manner
- Language skills
- Information
- Level of risk
- Access to clinician
- Appointment
- Diverse needs
- Written materials

# In-Person Access Criteria: Partial Listing

- Parking, safety, building access
- Facility appearance
- Consumer information
- Staff appearance
- Consumer/staff interactions
- Request for written information



# Telephone Scenarios

- Stress and marital
- Husband's drinking
- Friend's cocaine
- Kids' beating up
- Haldol reaction
- Housing request
- Mom has Alzheimer's
- Education, support
- Accessing Medicaid
- Confidentiality
- Complaints
- Timing needs
- Access needs

# Scenarios/Situations added at the Mystery Shopper Program

- Question
- A friend is hard of hearing.
- Home situation is poor and I need someone to speak to ASAP.
- Evaluation
- Did Provider mention interpretive services?
- Was a risk assessment done? Was consumer offered an immediate appointment?

- Question

- I'm new to the area and don't know where to go for counseling

- My husband and I need counseling and need late hours because of work



- Evaluation

- Did Provider refer to BHC and tell consumer they had a choice of someone close to their geographic area.
- Did Provider indicate that services were available according to the consumer schedule.

- Question

- My daughter is moving to this area and wants counseling.

- Concerns about friend taking medications and keeping appointments.

- Evaluation

- Refer to Access for triage? Mention choice of Providers based on specialty needs.

- Did Provider neither confirm nor deny person was receiving services? Did Provider mention confidentiality?



- Question
- My case worker cancels my appointments.

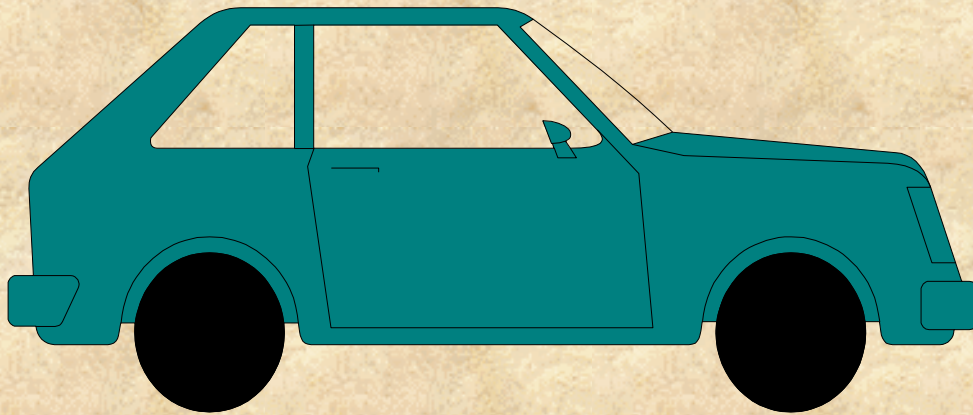


- My mother is approved for a nursing home and I want to keep her home.

- Evaluation
- Did Provider mention informal resolution options with a supervisor? Did Provider mention treatment dispute if problem is not resolved during first option?
- Did Provider mention availability of in home services for the elderly?

- Questions

- My friend is living in his car.

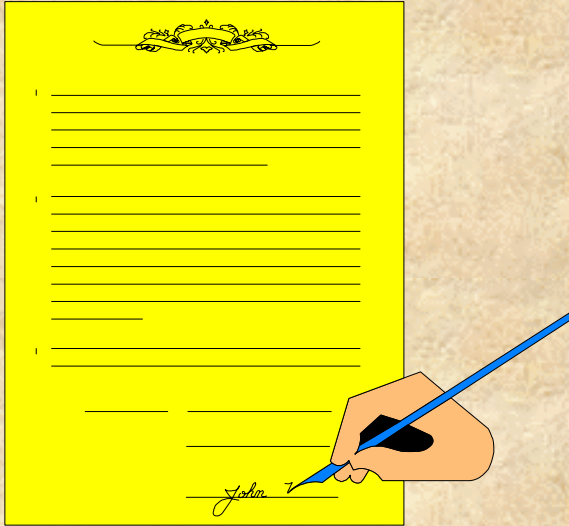


- Evaluation

- Did Provider refer to Access for triage and mention availability of housing assistance? If access did they evaluate for mental illness or developmental disability and if not present offer other community resources?

- Question

- I want to file a treatment dispute.



- Neighbors may be hurting there child.

- Evaluation

- Did Provider ask if person had tried to resolve with therapist or therapist supervisor? Did Provider offer Member Services as a resource?
- Did Provider refer them to Protective Services and give phone numbers?

- Question
- Do you have services for ADHD?
- My spouse is drinking how can I get help?

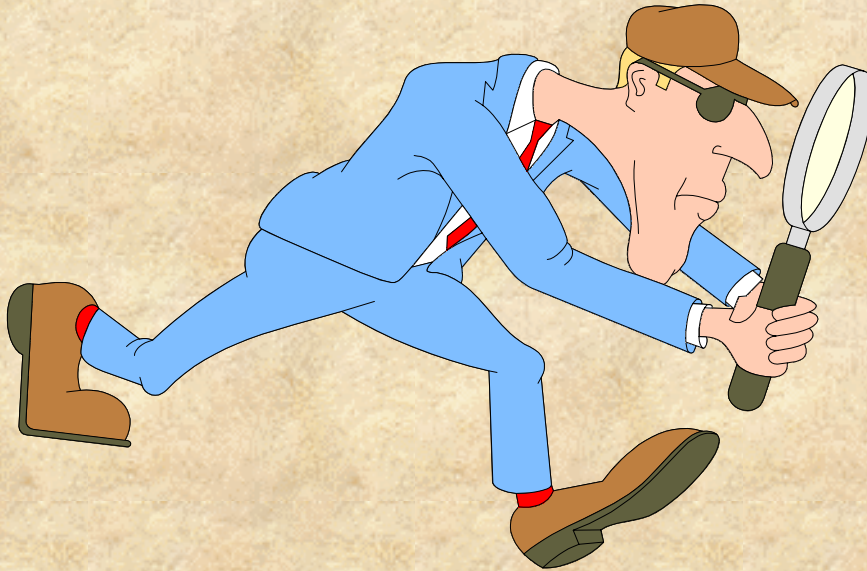
- Evaluation
- Did Provider mention choice and availability in different geographic areas? Did they give information on how to access services?
- Did Provider mention availability of substance abuse services and give number to access for substance abuse treatment?

- Question

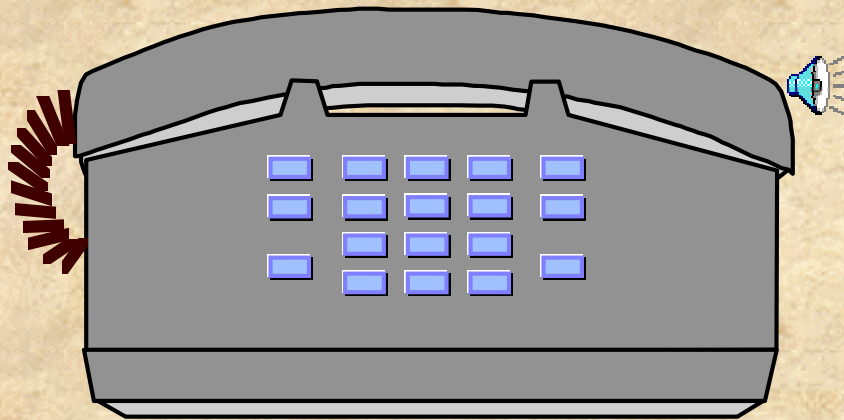
- What support groups are available?

- Evaluation

- Did Provider refer call to Member Services?



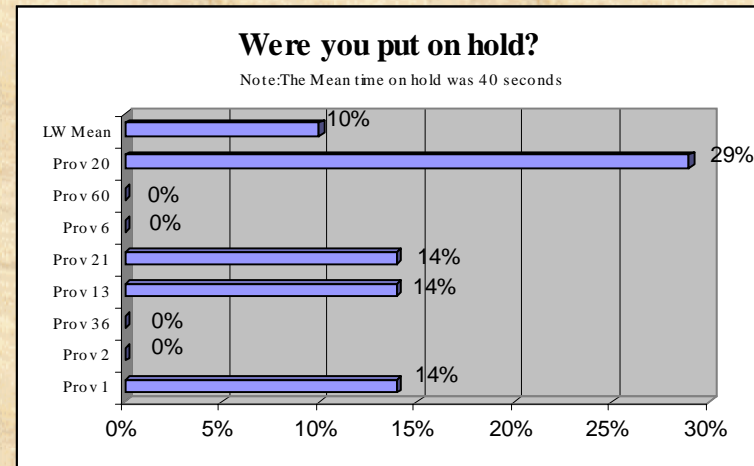
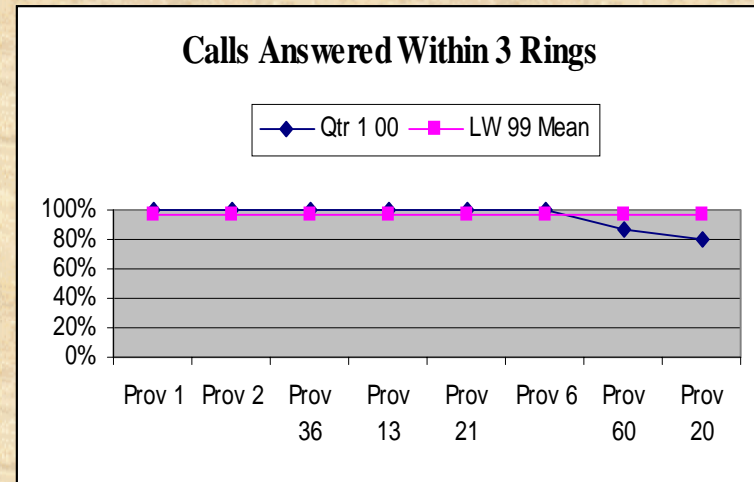
# Results and Report: Telephone Mystery Shopper



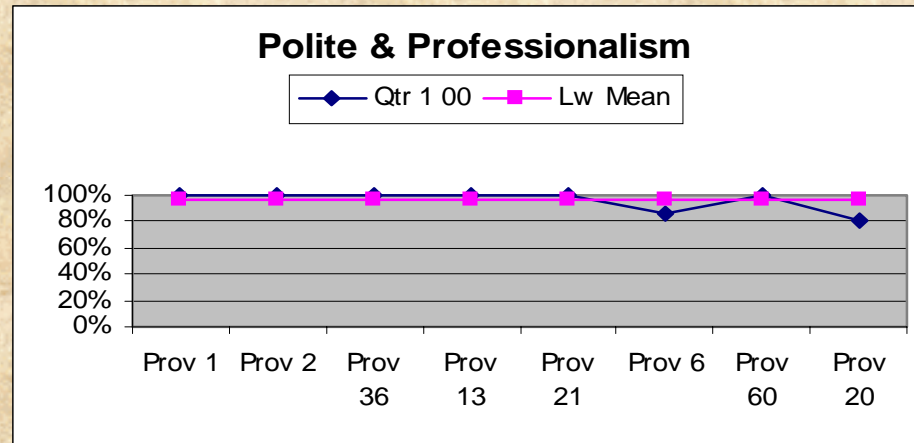
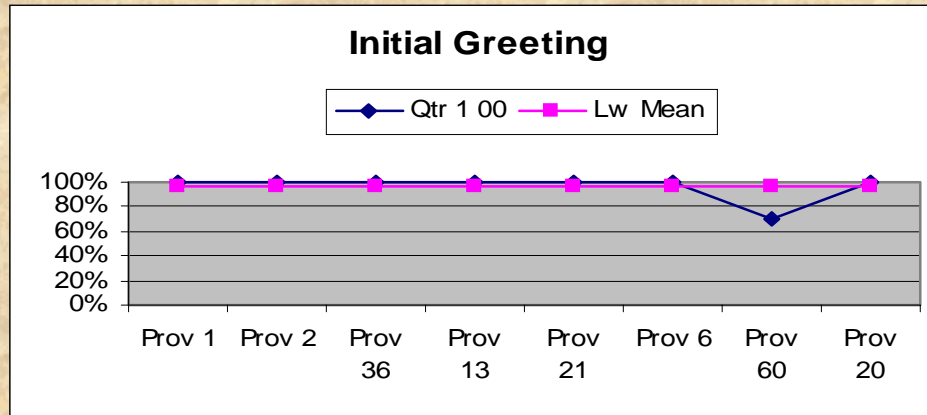
- Summary of findings
- Recommendations
- Detailed record of calls
- Monitor for trends with providers or network

# Mystery Shopper Results

- Mystery Shopper Participant Quarterly Meeting
- Advisory Council
- Board Report



# Additional Results



# Recommendations



Customer Service Training for providers

Customer Service Newsletter

Changing the way that a phone is answered, more personable

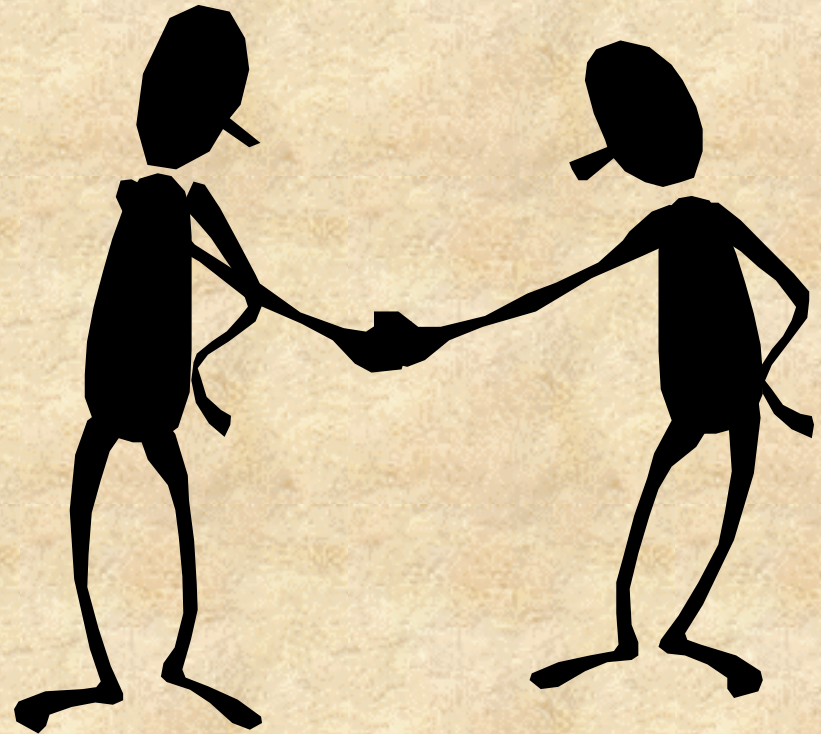
Utilization of data in Provider Profiles

# Part of Overall Consumer Involvement

- Satisfaction surveys
- Complaint resolution, appeals, grievance
- Service integration
- Complaint tracking
- Focus groups
- Advisory boards
- Board of directors
- Community liaison
- Diversity initiative
- Customer service training
- Performance standards
- Recruitment
- Policies/procedures
- Treatment planning
- Communications
- Psychoeducation
- Self Determination Advocates

# Who Does What?: A Consumer/Staff Partnership

- Consumer role
- Organization staff  
role



# Working with Providers to Provide Feedback



- Sharing your results
- Brainstorming on suggested improvements
- Recognizing what's working well

# Future Direction

Site Visits

Consumer Run Program

