Call Quality Team Manual

Company Info

Mission

<MISSION>

Our Purpose

We're building infrastructure to make essential health services easier to access for everyone. Our infrastructure is designed to change as the world does - offering nearby access, affordable services, and science-based guidance.

Our efforts are supported by the optimism and ambition we share with communities across the US, and together, we're imagining new ways to help more people stay safe, healthy, and informed wherever they are.

Office Locations

Testing Labs:

Lab	Address
<LOCATION> Lab	<LAB ADDRESS>
<LOCATION> Lab	<LAB ADDRESS>
<LOCATION> Lab	<LAB ADDRESS>

Lab Certifications

CLIA Certified

All labs are CLIA certified. The Clinical Laboratory Improvement Amendments (CLIA) regulate laboratory testing and require clinical laboratories to be certified by the Center for Medicare and Medicaid Services (CMS) before they can accept human samples for diagnostic testing.

Each lab has their own CLIA certificate. Below are the CLIA License #s for each lab:

<LABS AND CERTIFICATES>

Not CAP Accredited

Labs labs are NOT CAP (College of American Pathologists) accredited. **CAP Laboratory Accreditation:** helps laboratories. Maintain accuracy of test results and ensure accurate patient diagnosis. Meet required standards from CLIA, FDA, and OSHA. **CAP** requirements commonly exceed the standards, bolstering patient care and safety.

Purpose of a Call Quality Team

To ensure a high-quality, consistent patient experience through active monitoring and crafting relevant, specific feedback.

A patient should be able to call 3 times with the same question and get the same answer from 5 different agents. A Call Quality team strives towards this goal by scoring accurately and consistently.

Call Quality Systems & Resources

RingCentral / InContact

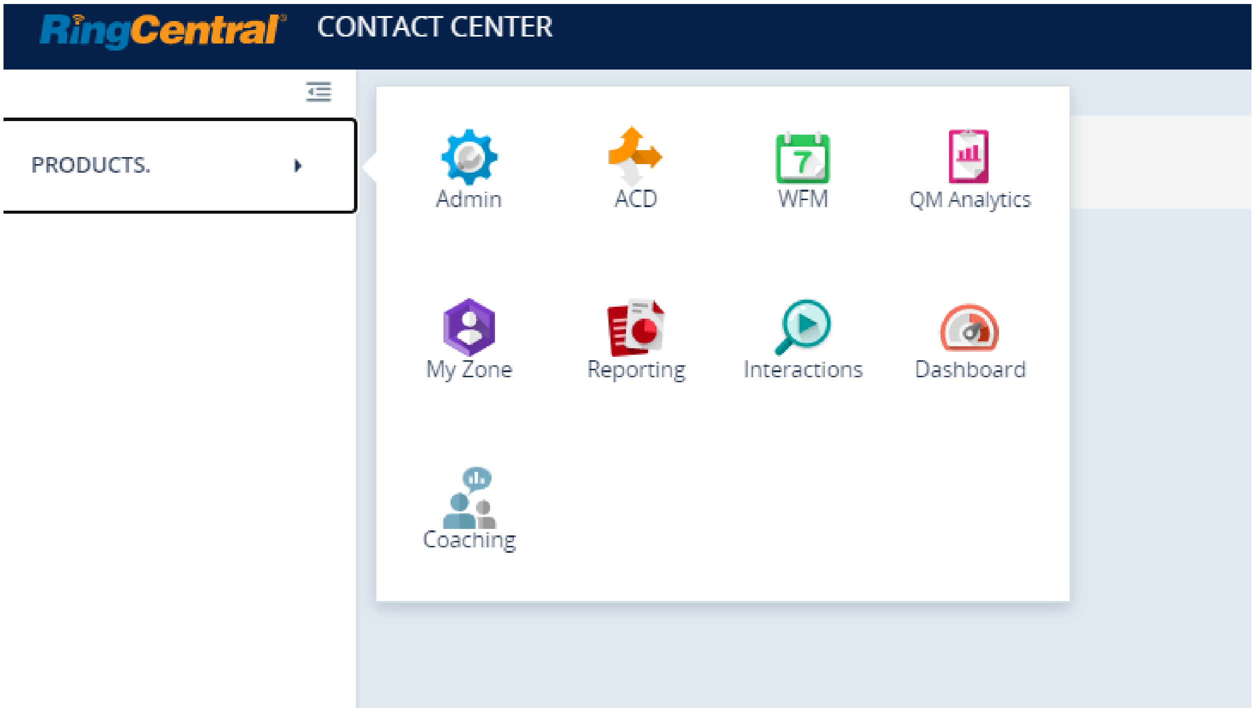
Link to Login

https://nice.incontact.com
Note: Do not launch MaxAgent

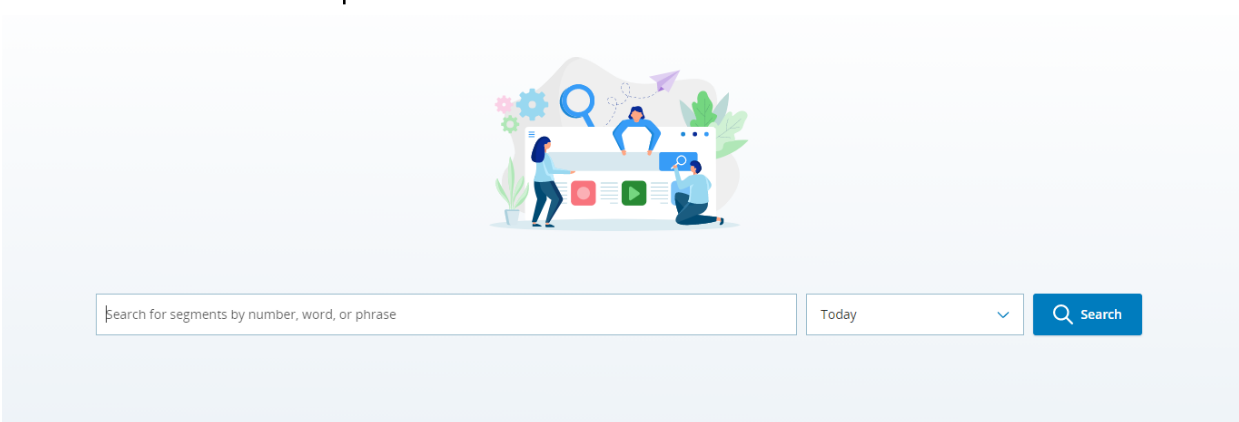
Accessing the Quality Monitoring System:

Log in to RingCentral

After you've logged in, click "Products" on the left hand side of the page.



Click “Interactions”. You’re presented with this screen:



You’re in!

Evaluating a Call

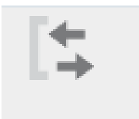
After you’ve logged in to RingCentral and clicked on Interactions, you can do one of two things:

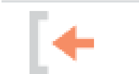
1) Click “Search” without typing anything into the search box (if you want to apply filters before searching)
2) Typing what you’re searching for in the search box and then clicking “Search”. Try searching for the agent’s name:

The filters on the left can help you narrow down the search. This includes the date / time to search, the duration of the call, etc.

You can identify the call direction by the icon under "Direction":

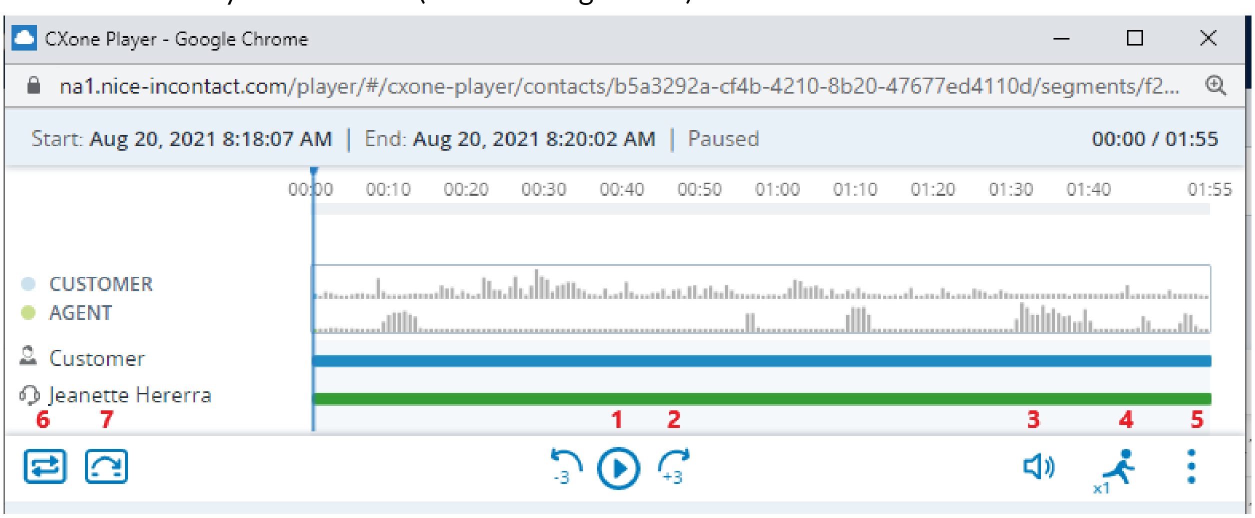

Outbound


Internal


Inbound

If you want to play a call, click on the play button on the right hand side of the screen.
Note: You should always select "Play Contact" if presented with the option.

This is the screen you should see (or something similar)

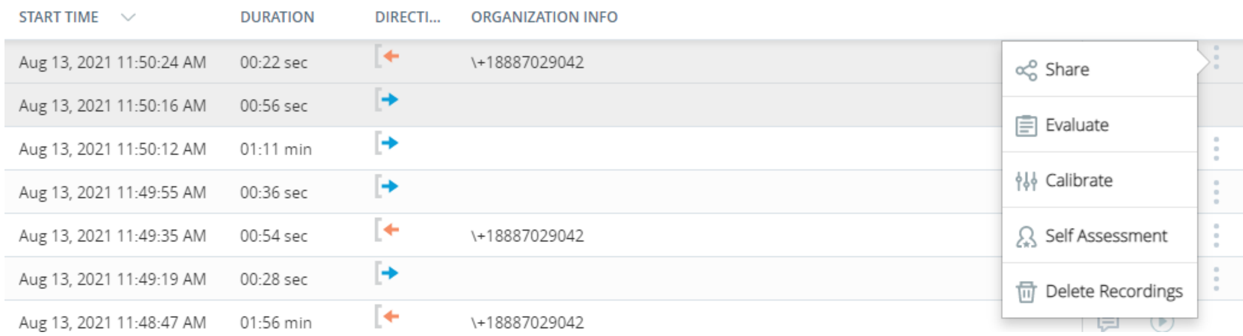


From this screen, you can:

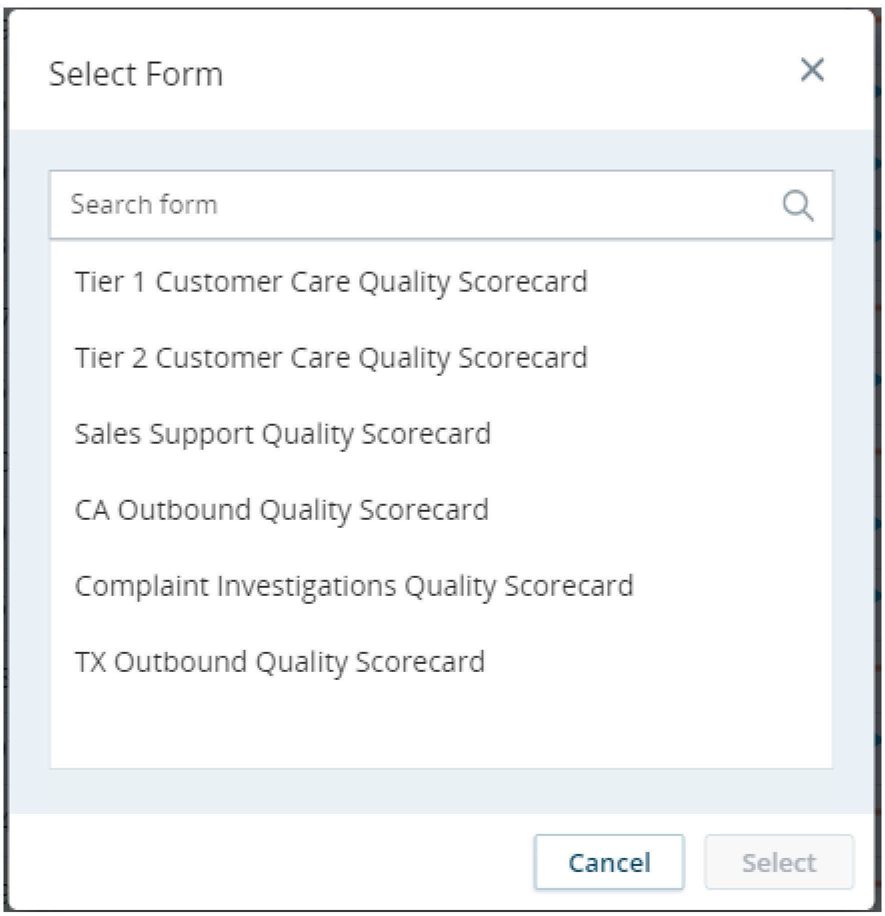
1. Pause / play the interaction
2. Skip forward or backward 3 seconds
3. Adjust the overall volume of the call
4. Adjust the speed of the call
5. See additional options

6. Adjust the volume of the patient and agent
7. Skip silence

To open a call evaluation, click the three vertical dots and then "Evaluate"



Select the correct form. **This is a critical step. Selecting the wrong form skews reporting and makes it difficult to evaluate since the forms are designed for their respective teams.**



After selecting the correct form, the evaluation form should load.

Evaluate the call, enter the notes, and when finished, click ‘Send to Agent” to save.

If you need to change the form, click “Change Form”. Any edits or notes made on the current form will not transfer over.

<SCORECARD IMAGE>

Call Monitoring Guidelines

Due Diligence

Part of your role is ensuring the agent follows through with what they say and accurately documents the interaction. For every call you monitor, pulling the relevant ticket is **required**.

You may have to do additional research, such as reviewing a shared spreadsheet, searching in Slack, and reviewing data in Metabase and DTSW.

Documentation Accuracy

When evaluating calls, it's important to **always** verify:

- The correct macro was used
- Tags match the situation (no gray tags, incorrect tagging, missing tags)
- Notes reflect the situation including:
    - A summary of the call
    - Patient's PHI entered correctly
    - Complete notes when forwarding to another team.

Service Failures

A service failure is an automatic zero. Missing these questions negatively affects the patient and the call to the point that we have failed them. Each form has them. They're in red text.

Assigned Agents

Email QA Tracker / Agent Assignment List <LINK>

Call Length

When it comes to monitoring calls, varying the length of calls selected for evaluation is important to get a full picture of the patient experience.

Most of your time should be spent monitoring calls that are the average handle time for that specific team. However, there can be value in listening to both shorter and longer calls.

Average Handle Times by Team (±00:00:30)

Tier 1: 00:07:00
Tier 2: 00:05:30
Outbound: 00:02:30

Timely Monitoring

Always start with the most recent interactions and work your way back. We don't always want to listen to their last 10 calls, we may want to look at their last 50 calls and select 10 from there. This provides a wider view of the agent's performance. Try to not go back further than 1 week.

Monitored Call Escalation

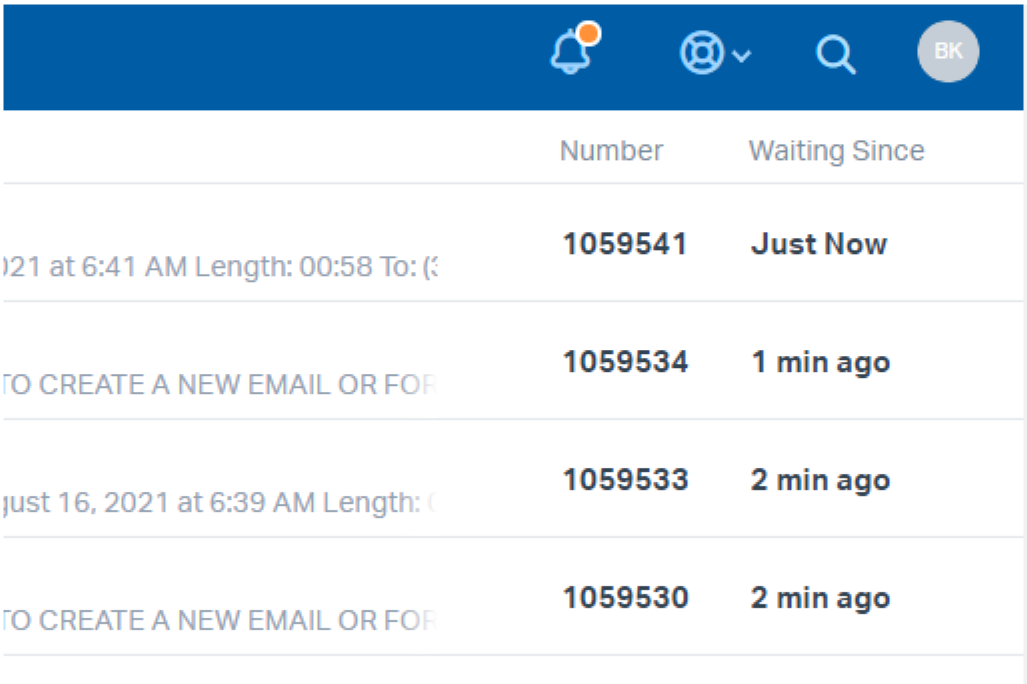
If you hear:

- Rudeness
- Unprofessionalism
- Any situation that should be documented, but was not. (shipping investigation, CI, etc.).

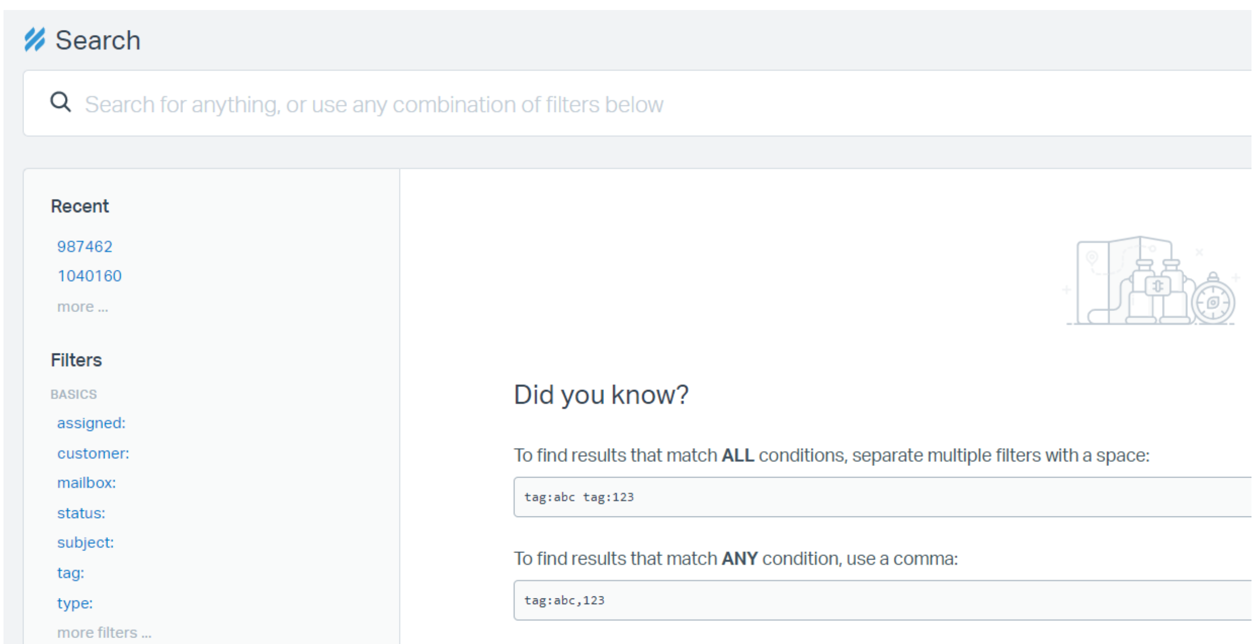
Immediately notify your supervisor so they can work with the lead to get the issue resolved ASAP.

Finding and Evaluating HelpScout Tickets

Log in to HelpScout and click the magnifying glass in the right-hand corner to open the search bar:

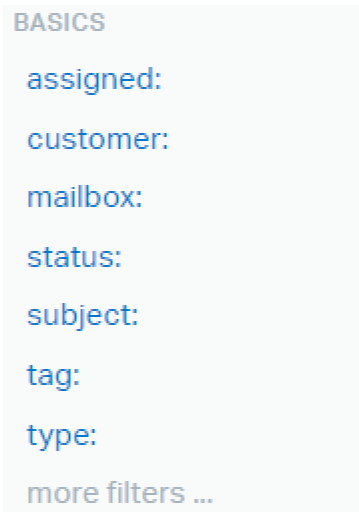


You will be presented with this screen:

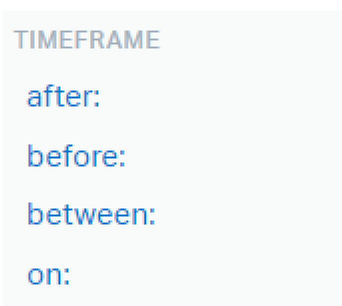


From here you can search for whatever you need. If you have the ticket number, you can type it into the search bar.

Sometimes you won't have the ticket number (for example, if you're trying to find tickets to evaluate). Search filters will help you refine your results. There are some basic filters, such as who the assigned agent is, who the customer is, etc.



There are also timeframe filters -- these will help reduce the number of results (so you're not searching for every ticket ever completed by the agent!)



You can have multiple filters in one search, for example:

- assigned:Bill Kane on:8/1/2021 status:closed

Note: There is **no space** after the colon in any filter.

Writing Effective Feedback

Word Choice

It's critical that our feedback is effective. Even though the leads are delivering it, the agent is going to see it. Word choice can make or break the effectiveness of feedback. If you find any of the below words and phrases to be unavoidable, try rewriting the feedback.

- Avoid "you should…" or "You shouldn't…"
- Avoid using "always" and "never" in your feedback. We're looking for excellence, not perfection.
- Phrases like "to be honest…" and "if I were you…" have no place in written feedback.
- Absolutely no slang.
- Talk about the positives, too. This helps the agent's morale and shows them we're not solely focused on "what they did wrong"

Clarity

- Be specific and direct. General comments don't help.
- Quote a specific policy and its location in a manual. Write out exactly what the patient / agent said.
- Agents need to know **exactly** what they did well and where they can improve.

Professionalism

- Focus on the behavior, not the person.
    - At times, it can be frustrating to evaluate a call. Perhaps you think you could have done better, or you're displeased with how the patient was treated. Take a breath and refocus. Feedback should be free of emotion.
- In written communication, it's the recipient's perception that matters, not the writer's intent. Focus on the facts.

Metrics

Productivity

You will be expected to monitor 10-15 interactions per agent per week.

Calibration Variance

Your lead will evaluate calls you have already evaluated. The difference between the two scores is called calibration variance. Your score is expected to be within 5% (plus or minus) of your lead's score.

Slack Channels

The list below contains channels that are often used when assisting a patient. When you are monitoring a call, you can verify if the agent followed the appropriate process by searching in these channels.

Tier 1	**Tier 2**	**Other**
#updated-processes	#t2-updated-processes	#lab-help
#communication	#t2--communication	#support
#questions	#t2--questions	#shipping-investigations
Call Quality	#doda-support	#complaint-investigations
#call-quality	#doda-missing-orders	#cls-communication
Outbound		
#OB-team-communications		

Important Links

Tier 1

Tier 1 Manual
Tier 1 Resource Page
CC Vaccine Resources

Tier 2

Tier 2 Manual
Tier 2 Resource Page
DOD Tier 2 Manual
DOD Resource Page
DOD - Sample Issues
DOD - Returned DOD Kits

Outbound

Vaccine Outbound Call Center Manual
If you need to see the most recent call sheet, contact Taylor Starnes or Bill Kane

Quality Forms

Note: Reference purposes only. Not to be used for evaluation purposes. Use RingCentral.
Tier 1 Quality Form
Tier 2 Quality Form
Outbound Quality Form