

# CallSource<sup>®</sup>

## Scoring Criteria

Healthcare



### Prospect Call Scenarios:

- Callers who are new or existing patients to an office who are calling with general questions regarding the practice
- General insurance or pricing inquiries are considered prospect calls



### Appointment Set:

All prospect call scenarios and general information calls that result in an appointment (specific time and date) to be seen by a physician:

- Pricing request calls that result in a consultation or appointment
- New client inquiry that results in an appointment
- Repeat client calls that result in a new appointment
- Current clients who are making their follow-up appointments



### No Appointment Set:

If the call handler does not set an appointment (specific time and date) on a prospect call for any reason:

- General information or calls that do not result in an appointment (specific time and date) to see a physician
- New client inquiries that do not result in an appointment
- Calls in which the call handler states that the insurance is not accepted
- Calls where a patient is told to walk-in
- Cancellations with no attempt to reschedule



### Not Applicable:

- Change of appointments
- Cancelled appointment with an attempt to reschedule
- All voicemails, after hour answering services, repeat callers
- Mailing list removal requests
- General written messages
- Caller that is calling back and has called in within the last 3 weeks regarding general information
- Callers who are requesting a service that the office does not offer