| **DLP ID & NAME** | KBXXXXXXX Open Call | | |
| --- | --- | --- | --- |
| **DEPARTMENT/FUNCTION** | Various/Service | **VERSION\_NUMBER** | V.1.0 |
| **SEGMENT** | BPO Member / Government | **ROLE(S)** | Customer Service Agent |

# Purpose

The purpose of this document is to HIPAA verify the caller and confirm the reason for the call.

# Procedure

1. Customer Service Agent – Opening the Call

| **Step** | **Action** |
| --- | --- |
| **1** | **Set** the **Avaya** status to **Available**. |
| **2** | **Wait** for the **inbound call**. The IVR delivers the call to the agent, and the verification Launcher appears. |
| **3** | **Answer** the **call** and **do** the **following**:   1. **Greet** the **caller**. 2. **Ask** the **caller,** “*How may I help you?*” |
| **4** | Does the current caller require translation assistance?   * If **YES**, go to [Step 5](#3znysh7) * If **NO,** go to [Step 10](#3dy6vkm) |
| **5** | **Identify** what **language** isappropriate for the current caller. |
| **6** | Is the appropriate language Spanish?   * If **YES,** go to [Step 7](#2et92p0) * If **NO,** go to [Step 9](#tyjcwt) |
| **7** | When theappropriate language IS Spanish:   1. **Transfer** the **caller** to one of the following Spanish Transfer options:    1. Individual:       * Mem Con Spanish: x115       * Claims CCSC Spanish: x145    2. MedSupp: x702    3. BPO Member: Review note (**NOTE**: BPO Member Spanish calls get routed through the phone system to our internal staff. When a BPO Member call gets routed incorrectly, please transfer it to an internal BPO Member agent.) |
| **8** | **Set** the **Avaya status** back to **Available**.  **PROCESS COMPLETE** |
| **9** | When the appropriate language is NOT Spanish:   1. **Advise** the **caller** that a translator will be added to the call for the best service. 2. **Place** the **caller** on hold. 3. **Refer** to the **DLP Language Line/Translation/Interpreters/Hearing or Speech Impaired Line** **DLP**. 4. **Add** the **caller** to the call and **introduce** the **translator**. 5. **Add** a **case comment** with the translator’s name and ID. |
| **10** | **Determine** if the **caller** is a:   * **Member** * **Non-member** **Authorized** * **Unauthorized** **caller** |
| **11** | **Identify** the **subject** or **reason** forthe call. |

2. Customer Service Agent – Determining the Caller and Identifying the Subject

| **Step** | **Action** |
| --- | --- |
| **1** | Is the caller an existing member?   * If **YES**, go to [Step 14 of the Determining if the Member Is in the Salesforce](#2p2csry)section * If **NO**, go to [Step 2](#1t3h5sf) |
| **2** | Is the caller an authorized representative?   * If **YES**, go to [Step 1 of the Determining if the Member Is in the Salesforce](#2jxsxqh)section * If **NO**, go to [Step 3](#4d34og8) |
| **3** | **Identify** whatthe **caller** needs assistance with. |
| **4** | Is the caller a prospective member?   * If **YES**, go to [Step 5](#2s8eyo1) * If **NO**, go to [Step 8](#35nkun2) |
| **5** | Is this an Individual plan?   * If **YES**, go to [Step 6](#17dp8vu) * If **NO**, go to [Step 7](#26in1rg) |
| **6** | When the caller IS on an Individual plan, complete the following:   1. **Transfer** the call to **Sales** (**NOTE**: The number for Sales is 602-864-XXXX.) 2. **Go** to [Step 4 in the General Information and Ending a Call](#3fwokq0) section. |
| **7** | When the caller is NOT on an Individual plan but is on a MedSupp plan, complete the following:   1. **Transfer** the call to **Health Plan** (**HP**) **(NOTE**: The number for HPO is 888-264-XXXX.) 2. **Go** to [Step 4 in the General Information and Ending a Call](#3fwokq0) section. |
| **8** | Does the caller need to be transferred to a different area?   * If **YES**, transfer the call to the appropriate area * If **NO**, go to [Step 4 in the General Information and Ending a Call](#3fwokq0) section |

3. Customer Service Agent – Determining if the Member Is in Salesforce

| **Step** | **Action** |
| --- | --- |
| **1** | Was the caller found in Salesforce?   * If **YES**, go to [Step 2](#z337ya) * If **NO**, go to [Step 1 in the General Information and Ending a Call](#1hmsyys) section |
| **2** | **Switch** to **FileNet** or **select** the **link** to **OnBase** from the link bar at the bottom of the screen.  **NOTE:** Agents need to be able to view CIRFI forms to determine if the caller is an authorized representative. |
| **3** | Is the caller listed as an authorized representative?   * If **YES**, go to the applicable application status check process * If **NO**, go to [Step 4](#1y810tw)   **NOTE**: If the member is the person calling, move to [Step 6](#2xcytpi). |
| **4** | When the caller is NOT listed as an authorized representative:   1. **Advise** the **caller** that they are NOT listed as an **authorized representative**. 2. **Ask** if the **member** is **available**. |
| **5** | Is the member available?   * If **YES**, go to [Step 6](#2xcytpi) * If **NO**, go to [Step 9](#qsh70q) |
| **6** | **Introduce yourself** to the member and **request HIPAA validation information**. |
| **7** | Does the member pass validation?   * If **YES**, go to [Step 8](#1ci93xb) * If **NO**, go to [Step 1 in the General Information and Ending a Call](#1hmsyys) section |
| **8** | **Go** to the applicable **service process** when the **member** CAN **pass validation**. |
| **9** | Does the caller want to be listed as an Authorized Representative, Durable POA, or Authorization of representation?   * If **YES**, go to [Step 10](#3as4poj) * If **NO**, go to [Step 1 in the General Information and Ending a Call](#1hmsyys) section |
| **10** | When the caller WANTS to be listed as an Authorized Representative, Durable POA, or Authorization of representation:   1. **Advise** the **caller** that a **CIRFI** will be **sent** to the member’s address. 2. **Request** that the **caller** and the **member** complete and submit the form. 3. **Select** the **link** to **Arvato** from the link bar at the bottom of the screen to requestthe **CIRFI**. 4. **Recap** the **action** that is taken and the resolution to the caller. 5. **Ask** the **caller,** “*Is there anything else?*”   **NOTE:** Agents need to be able to send CIRFI forms to callers. |
| **11** | Does the caller need further assistance?   * If **YES**, go to [Step 1 in the General Information and Ending a Call](#1hmsyys) section * If **NO**, go to [Step 12](#1pxezwc) |
| **1****2** | Does the caller want a case number?   * If **YES**, go to [Step 13](#49x2ik5) * If **NO**, go to [Step 4 in the General Information and Ending a Call](#3fwokq0) section |
| **13** | **Provide** the **case number** to the caller and **follow** [Step 4 in the General Information and Ending a Call](#3fwokq0) section. |
| **14** | Was the caller found in Salesforce?   * If **YES**, go to [Step 16](#3o7alnk) * If **NO**, go to [Step15](#147n2zr) |
| **15** | **Advise** the **caller** that additionalresearch is requiredand **follow** the applicable **“application status check”** process.  **NOTE**: Agents need to be able to search by social security number for new applicants. |
| **16** | **Complete** the **following**:   1. **Select** the **caller** and **Subject** within **Verification Launcher**. 2. **Verify** any **unchecked items**. 3. **Select** the **“Verification Complete”** button.The Verification Complete button creates an auto case. |
| **17** | Does the member pass HIPAA validation?   * If **YES**, go to [Step 18](#23ckvvd) * If **NO**, go to [Step 1 in the General Information and Ending a Call](#1hmsyys) section |
| **18** | **Verify** that the **following** on file is correct:   * Address * Phone * Email |
| **19** | Are the address, phone, and email correct?   * If **YES**, go to [Step 21](#32hioqz) * If **NO**, go to [Step 20](#ihv636) |
| **20** | **Follow** the applicable **Demographic Update process** when the **contact information** is NOT correct. |
| **21** | **Follow** the applicable **Service Process** when the **contact information** IS correct**.** |

4. Customer Service Agent – General Information and Ending a Call

| **Step** | **Action** |
| --- | --- |
| **1** | **Advise** the **caller** that only general information can be provided.  **NOTE:** An example of general information can include payment, address, phone number, etc. |
| **2** | Does the caller want general information?   * If **YES**, go to [Step 3](#41mghml) * If **NO**, go to [Step 4](#vx1227) |
| **3** | When the caller wants general information:   1. **Provide** the requested **general** **information**. 2. **Go** to [Step 4](#vx1227). |
| **4** | **Complete** the **following** to end the call:   1. **Select** the **Other Topic**. 2. **Select** the **Misdirected Call Type**. 3. **Select** the **Unauthorized Caller Subtype**. (**NOTE**: Select Unauthorized Caller Subtype if the caller cannot authenticate.) 4. **Close** the **Topic Case**. 5. **Go** to Wrap Call DLP.   **PROCESS COMPLETE** |

[Return to top](#gjdgxs)

# References

* Glossary of Acronyms & Terms
* DLP-43 Language Line/Translation/Interpreters/Hearing or Speech Impaired Line
* Wrap Call

# Revision History

| **Version** | **Revision Date** | **Revision Description** | **Authored By** | **SME Name** | **SME Approval Date** | **Management Name** | **Management Approval Date** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **1.0** | 08/15/2022 | Initial document creation | Lawrence Velasquez | Sta Sha R | 09/15/2022 | Sta Sha R | 09/15/2022 |
| **1.1** |  |  |  |  |  |  |  |
| **2.0** |  |  |  |  |  |  |  |