

Job Aid for Patient Navigators & Care Navigators for Opt-in/Opt-out & Data Rights Request for Patient Support Center

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1. PURPOSE AND SCOPE

This document is for Patient Support Center (PSC) Patient Navigator & Care Navigator teams. The Job Aid has been created for Patient Navigators & Care Navigators during the Opt-in/Opt-out and Data Rights Request process.

2. TRAINING

In addition to the roles listed below, this Work Instruction is applicable for all brands that are onboarded to the PSC.

NPS Role
Drug A Care Navigator
Drug B Care Navigator
Drug C Patient Navigator
Therapy Patient Navigator
Performance Excellence Analyst

3. PROCESS GUIDANCE FOR OPT-IN

Step #	Action
1	Agent receives a channel opt-in request (i.e., direct mail, phone, SMS or email)
2	Is the Patient enrolled in the program(s) (i.e., co-pay, free trial offer, adherence, etc.)?
	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>If YES,</p> <ul style="list-style-type: none"> • Proceed to STEP 3 </div> <div style="width: 45%;"> <p>If NO,</p> <ul style="list-style-type: none"> • Refer to the applicable Enrollments JA & WI </div> </div>
3	Agent opens an opt-in case either from the Inbound Parent Case with the case type "Channel" and sub-case reason "Channel" OR from the "Edit Consents" button on the patient's 360
4	Agent confirms the consent(s) the patient wants to opt-in to
4.1	If the patient wants to opt-in to phone and/or SMS, the agent must read the full Telephone Consumer Protection Act (TCPA) terms and conditions and the patient must agree to be opted-in [Refer to Call Guide]
5	Agent completes the opt-in(s) in Salesforce
6	Agent closes the case



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4. PROCESS GUIDANCE FOR CHANNEL OPT-OUT

Step #	Action
1	Agent receives a channel opt-out request from the caller (i.e., direct mail, phone, SMS or email)
2	Agent opens a channel opt-out case either from the Inbound Parent Case with the case type "Channel" and sub-case reason "Channel" OR from the "Edit Consents" button on the patient's 360
3	Agent confirms the consent(s) the patient wants to opt-out of
3.1	If patient wants to opt-out of all active consents, refer to SECTION 5
4	Agent completes the channel opt-out(s) in Salesforce
5	Agent closes the case

5. PROCESS GUIDANCE FOR PROGRAM OPT-OUT

Step #	Action
1	Agent receives a program opt-out request from the caller (i.e., adherence, co-pay, free trial offer, etc.)
2	Agent opens a program opt-out case either from the Inbound Parent Case with the case type "Opt-outs" and sub-case reason "Program Opt-out" OR from the "Edit Consents" button on the patient's 360
3	Agent confirms the program(s) the patient wants to opt-out of
4	Agent completes the program opt-out(s) in Salesforce
5	Agent closes the case

6. PROCESS GUIDANCE FOR ADDITIONAL OPT-OUT

Step #	Action
1	Agent receives an additional opt-out request from the caller (i.e., all company communications or brand opt-out)
2	Agent opens an additional opt-out case either from the Inbound Parent Case with the case type "Opt-outs" and sub-case reason "Additional Opt-out" OR from the "Edit Consents" button on the patient's 360
3	Agent confirms the what the patient wants to opt-out of
4	Agent opts the patient out of any active program and communication channels in Salesforce
5	If ISI is NOT required, the Agent warm transfers the call to the Customer Interaction Center (CIC) and requests a Reference Number from the CIC representative
5.1	If ISI IS required, the Agent provides the caller with the CIC phone number
6	Agent closes the case

7. PROCESS GUIDANCE FOR DATA RIGHTS REQUEST

7.1 DATA RIGHTS REQUEST CASE

Step #	Action
1	Agent receives a data rights request from the caller (i.e., "I want to know how my data is being used")
2	Agent opens a data rights request case from the Inbound Parent Case with the case type "General" and sub-case reason "Data Privacy Request"



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3	If ISI is NOT required, the Agent warm transfers the call to the Customer Interaction Center (CIC) and requests a Reference Number from the CIC representative
3.1	If ISI IS required, the Agent provides the caller with the CIC phone number
4	Agent closes the case

7.2 DATA RIGHTS DELETION REQUEST CASE

Step #	Action
1	Agent receives a data rights deletion request from the caller (i.e., "I want you to delete my information")
2	Agent opens a data rights request case from the Inbound Parent Case with the case type "General" and sub-case reason "Data Privacy Request"
3	If ISI is NOT required, the Agent warm transfers the call to the Customer Interaction Center (CIC) and requests a Reference Number from the CIC representative
3.1	If ISI IS required, the Agent provides the caller with the CIC phone number
4	Agent closes the case
5	From a patient or caregiver's 360, the Agent anonymizes the patient and/or caregiver [Refer to WI-022: Opt-in, Opt-out & Data Rights Request]
5.1	Caregiver Anonymization: <ul style="list-style-type: none"> If a caregiver is associated with a patient under age 18, the Agent would confirm both records are to be anonymized and complete the anonymization from the patient's 360 From the caregiver's 360, Agents are able to anonymize the caregiver record without anonymizing the patient record If only the caregiver is anonymized the "Anonymization Reason" selected is "CCPA" (California Consumer Protection Act)
5.2	If the anonymization is completed from the patient's 360, the "Patient Anonymization Reason" is either "CCPA" or "Other." If "Other" is selected, the Agent will have to provide a reason (i.e., Data Deletion Request)

8. PROCESS GUIDANCE FOR CASE STATUSES

Step #	Action	
	IF	THEN
1	The case was opened in error	<ul style="list-style-type: none"> Agent updates the case status to "Cancelled", the outcome to "Created in Error" and adds appropriate case comments
2	The patient withdraws their opt-in/opt-out request	<ul style="list-style-type: none"> Agent updates the case status to "Closed", the outcome to "Patient Changed Their Mind" and adds appropriate case comments
3	The patient was successfully opted-in or opted-out of a channel	<ul style="list-style-type: none"> Agent updates the case status to "Closed", the outcome to "Channel Preference Updated" and adds appropriate case comments
4	The patient was successfully opted-out of a program	<ul style="list-style-type: none"> Agent updates the case status to "Closed", the outcome to "Program Opt-Out Successful" and adds appropriate case comments

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5	ISI is NOT required, and the caller was warm transferred to the CIC <ul style="list-style-type: none"> Applicable for Brand or Global Opt-Outs & Data Rights Requests 	<ul style="list-style-type: none"> Agent updates the case status to "Closed", the outcome to "Transferred", transferred to "CIC" and adds appropriate case comments (including CIC reference number)
6	ISI IS required <ul style="list-style-type: none"> Applicable for Brand or Global Opt-Outs & Data Rights Requests 	<ul style="list-style-type: none"> Agent updates the case status to "Closed", the outcome to "Other" and adds appropriate case comments
7	The call is disconnected, and the caller provided call-back consent	<ul style="list-style-type: none"> Agent performs a single call-back If the caller doesn't answer, the Agent updates the case status to "Closed", the outcome to "Customer Disconnected" and adds appropriate case comments.
8	The call is disconnected, and the caller didn't provide call-back consent	<ul style="list-style-type: none"> The Agent updates the case status to "Closed", the outcome to "Customer Disconnected" and adds appropriate case comments
9	The caller is upset (i.e., Asks for a TL/AD, Is threatening the Agent, Is suing the company, Wants to contact media, etc.)	<ul style="list-style-type: none"> Agent reaches out to a TL/AD to see if they are available to take a call <ul style="list-style-type: none"> If the TL/AD is available, the Agent warm transfers the caller If the TL/AD is not available, the Agent offers a call-back Agent updates the case status to "Escalated", the escalation reason to "Upset Caller" and adds appropriate case comments
10	The caller requests a call-back and had provided call-back consent	<ul style="list-style-type: none"> Agent leaves the case status "In Progress", updates the outcome to "Call-Back Requested" and adds appropriate case comments If the caller doesn't answer, the Agent updates the case status to "Closed", the outcome to "Customer Abandoned" and adds appropriate case comments.
11	The caller is having a mental health crisis (suicidal/emergency crisis)	<ul style="list-style-type: none"> Refer to WPD-PSS-CEC-004 Agent updates the case status to "Closed", the outcome to "Emergency" and adds appropriate case comments
12	The caller is having a potential medical emergency	<ul style="list-style-type: none"> Refer to WPD-PSS-CEC-003 Agent updates the case status to "Closed", the outcome to "Emergency" and adds appropriate case comments

