# MED D - Guide to Transferring a Call

[Setting the Expectation](#_Toc126061412)

[Related Documents](#_Toc126061413)

**Description:** This document provides details for the CCR when a call is required to be transferred to another area.

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| Setting the Expectation |

Prior to transferring the call, it is important to resolve and properly document actions taken on all other issues.

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| **Beginning Script** |
| We have a specialized team that can assist with <see specific items listed in below chart>. I will transfer you to them to assist. Is there anything else that I may assist you with before I transfer the call?  **If appropriate:**  May I give you the direct toll free number for your future use?  **If Warm Transfer:**  It may take me a few minutes to reach them and provide them your information so they are prepared to assist you - would you prefer to hold until I reach them or would you prefer that I check back with you every few minutes?  **Blue MedicareRx (NEJE) ONLY:**   * Continue to Place the caller on hold. Never leave a caller on hold for more than two (2) minutes without returning to the call and touching base with them unless they have indicated not to check back. This includes when you are being assisted by the Senior Team or other department and during warm transfers. * Once all parties are conferenced :   + Thank you for holding.   + I have <receiving team member’s name> on the line.   + I have explained that you contacted us today about <provide detailed information about the reason for the call and the transfer>.   + <Receiving team member’s name> has the tools/resources to <provide information on what the receiving team can assist the caller with>.   + <Receiving team member’s name> will assist you further.   **If Cold Transfer:**   The team where I am transferring you may ask questions to verify your information.  **Note:** If you are transferring the call, provide the receiving team member with background as to why the transfer is taking place. Include as much information as possible, including information regarding a potential Grievance. |

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| **Transferring to** | **Transfer Method** | **Specific items being transferred for** |
| BSwift | Refer to [MED D - Bswift/Benefits Administrator](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=8a229d0e-9e53-4383-b387-0b960343bd93) or [Compass MED D - Bswift/Benefits Administrator](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=48c2d18f-1a58-49b2-bd0f-590b4773bc9b) | * BSwift Billing Questions |
| CD&A | Create a CD&A RM Task or Support Task.  Refer to [MED D - CCR - Coverage Determinations and Redeterminations (Appeals)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=22f353ee-e739-4f78-be33-b64916337260) or [Compass MED D - CCR - Coverage Determinations and Redeterminations (Appeals)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a23bc09d-37f7-4105-ba57-d4e9d7f512ff). | * Prior Authorization (Reject 75) * Quantity Limit (Reject 76) * Step Therapy (Reject 608 or Reject 75 AND 76 with messaging “Must Meet Step”) |
| [Clinical Care Services Clinical Counseling](file:///C:\Users\C337799\Downloads\CMS-PRD1-117127) | Warm transfer to Clinical Care Services Clinical Counseling Team at 1-866-251-3591, Option 2. | * Alleged Translation or Dispensing Errors * Brand v. Generic Differences * Clinical questions from Doctors’ Offices * Compound Clinical Inquiries (no price quotes) * Controlled Substance Laws * Drug Interactions * Drug Recalls * Drug Usage * Ingestion of wrong medication * Instructions for disposing unused medication * Beneficiary Requests to speak with RPh (Pharmacist) * NDC Numbers * OTC drugs and Nutritional Supplements * Product (Pill) Identification * Request to change the language on medication bottles that have already shipped * Rx Transfers refer to Prescription Rx Transfer * Prescription Verification / Interpretation * Returned to Participant (RTP) and Discontinued Prescriptions as a result of the following ONLY:   + Drug-Drug Interactions   + Duplicate Therapy   + High Dose Alert   + Drug/Medical Condition   + Allergy Alert   + C-2 Protocol * Side effects / Adverse reactions * Storage / Stability * Therapeutic Equivalents * Updates to a patient profile for Allergies or Health Conditions only * Zika Virus |
| Enrollment (Telesales) Agent | Warm Transfer  **Current enrolled beneficiary**  1-800-882-9194  **Internal Use Only**    **Prospective (non-beneficiary)**  1-844-985-0085  **Internal Use Only**   * Enter Caller’s Zip Code when prompted.   **Note:** Phone number to provide to the beneficiary **if requested** is 1-833-606-0372. Advise the caller not to select Option 1 as this will return the caller to SilverScript Customer Care. State there will be two selections to make and provide the appropriate Options to select for each call type below:   * Current enrolled beneficiary: Select Option 2 and then Option 1 * Prospective (non-beneficiary): Select Option 2 and then Option 2 | * Enroll in a plan * Assistance with determining which plan is better * Recommendations on which plan to choose * Plan Changes   **Note:** This does **NOT** include individuals indicating they were disenrolled due to:   * [Non-payment of premium](file:///C:\Users\C337799\Downloads\CMS-PRD1-063898) /[Compass Non-payment of premium](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=211427e2-88f8-4f0b-9109-eb5516af60b8) - These calls should be sent to the Premium Billing Specialized Team * [Non-payment of IRMAA](file:///C:\Users\C337799\Downloads\CMS-PRD1-114370) / [Compass Non-payment of IRMAA](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=be7314b7-c0f7-4f6b-ada6-7e9267b1852b) |
| Onshore SSI Customer Care  **Note:** If the beneficiary asks to speak to a Supervisor, follow Senior Team Procedural Transfer Process. Refer to [MED D - When to Transfer Calls to the Senior Team](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d3ca13af-f894-45b7-b16a-f2cb777adf77) or [Compass MED D - When to Transfer Calls to the Senior Team](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7). | **SilverScript**  Warm Transfer  1-800-378-6045  **Hours**: 7 am to 7 pm CT Monday-Friday  **After Hours**: Follow Senior Team Procedural Transfer Process. Refer to [MED D - When to Transfer Calls to the Senior Team](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d3ca13af-f894-45b7-b16a-f2cb777adf77) or [Compass MED D - When to Transfer Calls to the Senior Team](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7). | * Beneficiary requests to speak to a United States (US) Representative because they are unhappy the CCR is not located in the USA |
| [Premium Billing Specialized Team](file:///C:\\Users\\C337799\\Downloads\\TSRC-PROD-012619)  **CCR Note:** If there are any issues using transfer, notify your Supervisor immediately. | Warm Transfer  1-866-824-4055 | * Changes to credit cards * Good Cause Determination * Disenrollment due to Non-Payment of Premiums * Dunning * Payment Plans * SSA/RRB * RCD * Late Payments |
| [Senior Team / Escalation](file:///C:\Users\C337799\Downloads\TSRC-PROD-018060) | **Assist**  **HealthPlan/EGWP**  1-877-209-5167, Option 1  **SilverScript**  1-888-572-0869, Option 2  **Procedural**  **Blue MedicareRx (NEJE) Dedicated Senior Team**  Warm Transfer  1-800-790-6382, Option 1  **HealthPlan/EGWP**  Warm Transfer  1-877-209-5167, Option 1  **SilverScript**  Refer to 1-888-572-0869, Option 2  **Escalation**  **Blue MedicareRx (NEJE) Dedicated Senior Team**  Warm Transfer  1-800-790-6382, Option 2  **HealthPlan/EGWP**  Warm Transfer  1-877-209-5167, Option 2  **SilverScript**  Warm Transfer  1-888-572-0869, Option 2 | * Override * Further assistance * Supervisor escalation |
| Specialized Member Services Team (SMST) | **HealthPlan/EGWP**  Warm Transfer  1-844-234-8264  **SilverScript**  Warm Transfer  1-833-458-0858  **Note:** Do not provide the SMST phone number to the caller. This can only be used by internal colleagues. | * LIS Disputes * CMS Auto Enrollment/Disenrollment * Cancellation of Disenrollment * Attestation to opt out of Employer Coverage (TRC-127) * Out of Area Disenrollment issues * Disenrollment due to Loss of Medicare Eligibility |
| Specialty | Warm Transfer  1-800-237-2767 | * Clinical Questions regarding Specialty medications * Questions regarding the enrollment process, status of a specialty order, or payment for a specialty order |
| Other Processes | Refer to appropriate work instructions or [Phone Numbers (Contacts, Departments, Directory, Addresses, Hours and Programs)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f22eb77e-4033-4ad9-9afb-fc262f29faad). | * Review appropriate work instruction overview |

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| Related Documents |

* Grievance Standard Verbiage (for use in Discussion with Beneficiary) section in [MED D - Grievances Index](file:///C:\Users\C337799\Downloads\TSRC-PROD-007931)

* [Basic Call Handling - Greet, Warm, Cold and Transfers, Call Hold and Close Call](file:///C:\\Users\\C337799\\Downloads\\TSRC-PROD-016401)

* [Phone Numbers (Contacts, Departments, Directory, Addresses, Hours and Programs)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=f22eb77e-4033-4ad9-9afb-fc262f29faad)

**Parent SOP:** CALL-0048: [Medicare Part D Customer Care Call Center Requirements-CVS Caremark Part D Services, L.L.C.](https://policy.corp.cvscaremark.com/pnp/faces/SecureDocRenderer?documentId=CALL-0048&uid=pnpdev1)

**Abbreviations/Definitions:** [Abbreviations / Definitions](file:///C:\Users\C337799\Downloads\CMS-2-017428)

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