# Cresta Functionality and Processes

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**Description:** This document provides information on the Cresta Agent Assist, which can generate live call transcription and automated call notes for CCRs.

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| Overview |

Cresta Agent Assist is an AI-powered solution that is designed to help Care Representatives have more effective and efficient conversations by providing real-time transcription and automatic call note summarization. It transcribes and creates summary for calls within [Five9](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e696b7c2-078e-444c-a317-bf857986aa23) (both Inbound and Outbound calls).

As the CCR and member are speaking, the transcript updates in the agent application to provide a written record of the conversation. This allows the CCR to refer to previous parts of the conversation during the call.

Cresta generates an accurate summary immediately when the conversation ends. Its summaries include a custom CVS call note template, the call notes will automatically transfer into the Close Case section.

Do not make revisions to Cresta generated notes. Any opportunities identified in the Cresta generated notes will be addressed via routine quality assessments.

**User Tips:**

* Place the Cresta Agent Assist application so that it is visible to you when you receive and/or make a call within Five9.
* Assure key applications, such as Five9, or Compass, are also visible on your screen.

CVS teams who handle Spanish skills will continue to manually document accounts. Cresta will not provide transcription and call summarization for calls conducted completely in non-English languages. Cresta can transcribe and summarize calls that utilize the Language Line, as English translations occur during these calls.



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| How to Log-In to Cresta Agent Assist |

Follow the steps below:

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| **Step** | **Action** |
|  | Start the Cresta login process AFTER you have logged into Five9 and BEFORE setting your status in Five9 as “Ready”.  Click on the “Cresta 3” icon from the **Start** Menu.  **Note:** You may pin this to your task bar by right clicking on the “Cresta 3” app from the **Start** Menu and selecting “Pin to Start”.  **CVS users:** Find **Cresta 3** application in the Start menu or by searching “Cresta 3” in the search bar as shown below:    **Alorica users:** Find the **Cresta 3** application in the Start menu as shown below:  A screenshot of a computer  Description automatically generated  **Everise users:** Refer to [How to Log-In to Cresta Agent Assist with CVS Single Sign On](#_How_to_Log-In), section.   * If you have **not** been transitioned, continue here.     **Result:** A new window opens with Single Sign On (SSO) options. |
|  | Select your respective company’s Single Sign-on (SSO) login button:   * CVS SSO * Alorica SSO * Everise SSO |
|  | Select “Continue.” |
|  | **Note:** Step 4 is only required for users logging into Cresta Agent Assist for the first time. If you’ve previously checked the box, proceed to **Step 5**.  A new window will pop-up. Check the noted box and click “Open”. |
|  | You have successfully logged into Cresta. Click on the agent icon to hide and unhide the view.    **Note:** Cresta Agent Assist keeps your login session active until your computer is restarted or the login session expires. |

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| How to Log-In to Cresta Agent Assist with CVS Single Sign On. |

 This section is for Agents that have been transitioned to the CVS Single Sign On process for Cresta.

Follow the steps below:

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| **Step** | **Action** | | |
| **1** | Agents must be logged in to Citrix **first.** Refer to [Citrix Log in Steps – Vendor](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d9cf75ca-3cef-4ec8-8ed0-fc1272c56b21), as needed.  **Note:** Start the Cresta login process **AFTER** you have logged into Five9 and **BEFORE** setting your status in Five9 as “Ready”. | | |
| **2** | From the Citrix main page click the **Cresta- Azure** application.    **Result:** Will depend on if it is the first time accessing the application or not. | | |
| **3** | Review the following: | | |
| **If…** | **Then…** | |
| Not the first-time logging in | **Result:** The Single Sign-on page will display. Proceed to **Next Step**. | |
| First time logging in | **Step** | **Action** |
| **1** | The first time opening the app, **Right Click** on the **Open File Link** and **Select:** **Always Open Files of This Type**.    **Result:** The Notice Screen will display. |
| **2** | Click **OK** when the Notice Screen displays.    **Result:** The Single Sign-on screen will display. |
| **4** | Select the **CVS** **SSO** (Single Sign-on) login button. | | |
| **5** | Validate your CVS Health email address. Select **Continue**. | | |
| **6** | A new window will pop-up. Check the noted box and click **Open**.  **Note:** If you’ve previously checked the box, proceed to the Next Step.    **Result:** Login is complete. | | |
| **7** | You have successfully logged into Cresta. Click on the agent icon to hide and unhide the view.    **Note:** Cresta Agent Assist keeps your login session active until your computer is restarted or the login session expires. | | |

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| How to Log-Out of Cresta Agent Assist |

Follow the steps below:

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| **Step** | **Action** |
| **1** | Right click on the “C” Cresta icon. |
| **2** | A list of options will display. Select **User** from that list and then **Sign Out from Cresta**. |
| **3** | Click **Confirm** on the Sign Out window that opens. |

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| Using Cresta Agent Assist |

Follow the steps below:

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| **Step** | **Action** | |
| **1** | Once a call starts, the application changes from a “C” to a timer, which helps keep track of how long a conversation is running.  **Note:** A new transcription (and associated summary) window is opened for each new call. | |
| **2** | To view the Cresta menu, hover over the app.     * Use the right side of the menu to quickly view or hide any of the widgets available, like Notes and Transcript. * The widgets can also be moved and resized based on your preference. * The “undock” button in the top right of the notes screen will allow you to move the notes and transcript screens independently. * Assure key applications, such as Five9, or Compass, are also visible on your screen. | |
| **3** | Cresta automatically starts generating a transcript during the call and generates call summary notes after the call has ended when the member disconnects from the call.  **CCR Note:** Cresta will not transcribe when a member is on hold. This includes being placed on hold as part of a warm conference/transfer.  CVS teams who handle Spanish skills will continue to manually document accounts. Cresta will not provide transcription and call summarization for calls conducted completely in non-English languages. Cresta can transcribe and summarize calls that utilize the Language Line, as English translations occur during these calls. | |
| **If...** | **Then...** |
| Using Compass | No need to wait for the note to populate into Compass. Complete all required actions as part of Close Case process.  The Cresta call summary notes will be transferred from Cresta to Compass **Case Notes** section **after** you close your case for your call. This action is occurring in the background as you complete the Close Case process. You may not see the notes populated during this time. Close the case and proceed with next call.  Do not make revisions to Cresta generated notes.  Proceed to **Step 4**. |
| **4** | Continue following the End Interaction process within Five9 softphone.  Do not use the “Close this call” button in Cresta to end the interaction with the member. | |

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| Viewing Past Calls in Cresta Agent Assist |

At times, a Care Representative may need to access summaries for a previous call. Follow the steps below:

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| **Step** | **Action** |
| **1** | CCRs can view transcriptions and associated summaries of past call by selecting the “See past calls” button. |
| **2** | A new browser window opens requesting CCRs to login via SSO.  **Note:** If you are already logged into Cresta Agent Assist, you may be automatically logged into Cresta Director browser window |
| **3** | Select the specific call to view the transcription under the “Conversations” tab. |
| **4** | Select the notes icon, in the right column menu to view the associated call summary notes. |
| **5** | Cresta generated call summary notes will automatically transfer into Compass. |

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| Next Best Action |

During calls, agents may receive pop-up notifications or “hints.” Review the hint and take appropriate action. Hints will disappear on their own after a set amount of time (usually 30 seconds), or they can be manually closed by clicking the “X” in the upper right corner.

**Note**: Hints are based on key words and may appear in moments that aren’t relevant. If the pop-up message is not applicable, continue with the call as normal.

Below are examples of hints that will be available through Cresta. The set of available hints may change over time:

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| **Scenario** | **Hint** | |
| Help reduce member worry or uncertainty caused by silence | A white background with black text  Description automatically generated | **Avoid Silence**  "Remember to advise member what you are doing and avoid long periods of silence" |
| Members tend to accept hold time better when they are thanked for waiting | A white background with black text  Description automatically generated | **Express Appreciation for Holding**  "Thank the member for their patience while holding" |
| Callers want reassurance that we are willing and able to assist | A white background with black text  Description automatically generated | **Yes, I Can!**  "Please remember to respond with "yes I can help you..."" |
| Members feel we are concerned about them when we verify that they have enough medication | A screenshot of a chat  Description automatically generated | **Low on Medication?**  “Reminder: please ask the caller "how much medicine do you currently have on hand?" If five days or less refer to your source document linked below" |
| Clients need us to properly identify and document grievances | A white background with black text  Description automatically generated | **Is This a Grievance?**  "Remember to file a grievance if the member is experiencing an issue." |
| Digital registration enables members to care for their needs without calling | A close up of a sign  Description automatically generated | **Offer Quick Registration Link**  “Check if member is registered on Caremark.com. If not, send a link to register on Caremark.com" |

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| FAQs |

Refer to the following Frequently Asked Questions:

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| **#** | **Question** | **Answer** |
| **1** | What if Cresta does not generate call summary notes from the call? | Proceed to the “Past Calls” section to see if the call summary notes are available there.  If not available, notes will need to be entered manually for the call for People case users. For Compass users, no need to do anything |
| **2** | What if the Cresta application is offline? | Follow your existing work instruction processes for call notes/documentation.  Preface the note with “Cresta is down.” |
| **3** | What if the caller wants to discuss more than one account? | * If the member is requesting to discuss another account, use the “End the call” button in Cresta before opening the next member account. This will generate the call notes for the first account. * After selecting “End the Call” button, select “Yes, end call” from the prompt.   + Cresta generated notes will automatically transfer into Compass for the initial account discussed.   **Note:** Using the “End the Call” button in Cresta will not end the call in Five9.      **Note:** Using the “Close this call” button will end the transcription for the current call.     * For the subsequent accounts being discussed on the same call, use existing processes for call notes/documentation for Compass. Preface each note with "Multiple account discussion required to use End this Call button in Cresta and take manual notes." |
| **4** | What if the Cresta application doesn’t close? | 1. Launch the Task Manager, select Cresta and then “End Task”. 2. If that does not resolve the issue, log out of Cresta and re-login. 3. If that does not resolve the issue, work with your leader to open an IT ticket to resolve. |

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| Related Documents |

[Compass MED D - Call Documentation Job Aid](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=433711aa-8fa6-447c-872b-bd69cd6cd7c0)

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