# PeopleSafe - Health Engagement Engine (HEE) View Opportunities

[High Level Process (HLP) Guide](#_Toc205964587)

[Process](#_Toc205964588)

[Unable to Present HEE Opportunities – System Error](#_Toc205964589)

[Opportunities for Members with Multiple Accounts](#_Toc205964590)

[Types of Opportunities in PeopleSafe](#_Toc205964591)

[Update Opt-Out Preferences](#_Toc205964592)

[Member Engagement Program](#_Toc205964593)

[Refill Pull Forward](#_Toc205964594)

[Enroll in Automatic Refill Program (ARP)](#_Toc205964595)

[Enroll in Email/Text Alerts](#_Toc205964596)

[Quick Registration for Caremark.com](#_Toc205964597)

[Electronic EOBs (Explanation of Benefits)](#_Toc205964598)

[Related Documents](#_Toc205964599)

**Description:** Describesthe Health Engagement Engine™ (HEE™) technology which helps deliver innovative health care solutions to our members depending on the client’s offerings. The HEE functionality in PeopleSafe identifies and displays “opportunities” for CCRs to present during the course of a phone call. CCR’s are able to follow the priority order or quickly assess the best opportunities to present to the caller, discuss the opportunities with Consultative Call Flow (CCF) verbiage, and accurately register the outcome of the opportunity offer.

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| High Level Process (HLP) Guide | |
| 1. [**Identify**](#Identifyifopportunitiesarebeingoffered) **if there are opportunities offered.** | Medicare D HEE opportunities adhere to all legal and regulatory guidelines as well as those of Centers for Medicare and Medicaid (CMS) pertaining to all matters including Ship Consent). For the Auto Refill (ARP) program, refer to [MED D - Expressed Consent (Ship Consent) for Non-Beneficiary Initiated Fills (083036)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3f0adae9-ad4d-4e9c-9707-301d785da1cf) for more information. |
| 1. [**Select**](#Selectappropriatemembername) **the appropriate member’s name.** | Refer to the [Health Engagement Engine (HEE) Index (106189)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c9265c2b-45b5-4bcf-b292-ba06e9860ef1). |
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| 1. [**Select**](#Selectthefirstopportunitylisted) **the first opportunity listed.**     **Note:** Offer both Auto Refill and Auto Renewal at the same time and setup both when accepted by the member.   1. [**View**](#ViewandPresentOpportunities) **and present the Opportunity.** 2. [**Register**](#RegistertheOutcome) **the Outcome.** | When closing the call, verify that the following are selected in Capture Activity or Log Activity:   * Source of Contact: **MEM / DEP** * Form of Contact: **Incoming** |
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[Top of the Document](#_top)

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| Process |

This section provides instructions on how to present opportunities that displays in the system to a fully authenticated member that is eligible and enter an appropriate disposition.

**Note:** When discussing HEE Opportunities, remember to refer to [HIPAA Grid (028920)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce).

Perform the steps below:

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| **Step** | **Action** | |
| **1** | Identify if there are Opportunities offered by the **View Opportunities** text flashing on your screen then select the **View Opportunities** drop-down box.     * If a checkmark is listed next to the eligible member’s name, one of more opportunities are available for that member.   **Notes:**   * + Drop-down box displays the list at the member level (18 years of age and up).   + If more than one member is listed and no checkmark is next to the member’s name, no opportunities are available for that member.     [Return to HLP Guide](#_High_Level_Process) | |
| **2** | Select the appropriate member’s name by clicking on **blue hyperlink**.  **Result:** The View Opportunities screen displays. If the Show All Opportunities button is enabled, then [opportunities exist for multiple accounts](#_Opportunities_for_Members_1).  **Notes:**   * If the selected member is the cardholder or spouse, any activity for dependents under age 18 should display unless the medications are Birth Control, Anti-Psychotic, or Sensitive Drug list medications. * If Birth Control, Anti-Psychotic, or Sensitive Drug List medications display for dependents under age 18, DO NOT present, mark HEE as Inappropriate.   + If an inappropriate HEE (example above) displays, appropriately close the call. Create an email to your supervisor.  1. The Subject line of the email should indicate: **\*\*Securemail\*\*** HEE System Issue (Contains PHI). 2. The Body of the email will include the following information: Member’s name, Member’s ID, Client Code indicate RxClaim Platform and include a brief explanation of the occurrence in the body of the email.   [Return to HLP Guide](#_High_Level_Process) | |
| **3** | 1. Select the first opportunity listed and click on the **Present Opportunity** button then view and present opportunities for the medications that the authorized/authenticated caller can name. Refer to [Types of Opportunities in PeopleSafe](#_Types_of_Opportunities).     b. Paraphrase the opportunity information to the member.  **Example:** (Pop up informational box displays)    [Return to HLP Guide](#_High_Level_Process) | |
| **4** | Register the Outcome by selecting the appropriate **Able to Present** radio button and select the Disposition code from the drop-down list and add Comments. | |
| **If the Opportunity was…** | **Then** **take the following action…** |
| Presented to the caller  The caller listened to the opportunity and accepted it.  (Action performed based on the caller’s response to the opportunity). | 1. Select **Yes** for Able to present then select **Positive Response w/action**. 2. Perform the appropriate action.   **Example:** Enrolling medications in Auto Refill or sending a New Rx Request for a 90-day Home Delivery / Mail Order prescription. |
| Presented to the caller  **and**  The information was received in a positive manner; however, the caller does not want any action taken at this time. | Select **Yes** for Able to present then select **Positive Response** for the Disposition.  **Note:** Opportunity redisplays the next time the account is accessed. |
| Presented to the caller  **and**  The member was **not interested** and does not want to discuss the opportunity at a future date. | Select **Yes** for Able to present then select **Not Interested** in the Disposition field.  **Note:** Opportunity redisplays in three months. |
| Presented to the caller  **and**  It does not apply to their current situation | 1. Select **Yes** for able to present then select **Inappropriate** in the Disposition field. 2. Notify your Supervisor of an Inappropriate offering by sending an email as follows:  * **Subject Line:** \*\*Securemail\*\* HEE System Issue (Contains PHI) * **Body of Email:** Indicate RxClaim Platform with the Member’s name, Member’s ID and Client Code. |
| System incorrectly offers the opportunity under cardholder or spouse fordependents for sensitive medications such as Birth Control, Anti-Psychotic or Sensitive Drug List medications  DO NOT present! | 1. Select **No** for able to present then select **Inappropriate** in the Disposition field. 2. Notify your Supervisor of an Inappropriate offering by creating and sending an email as follows:  * **Subject Line:** \*\*Securemail\*\* HEE System Issue (Contains PHI) * **Body of Email:** Indicate RxClaim Platform with the Member’s name, Member’s ID and Client Code |
| System incorrectly offers a duplicate opportunity.  **Note:** These occurrences should be rare.  **Example:** Duplicate Opportunity | Select **Yes** for able to present but do not present the opportunity the second time then select **Inappropriate** in the Disposition field. |
| Did not present the opportunity. | Select **No** for Able to present. |
| When the opportunity was for a family member who is not present to accept or reject the offer. | Select **Later** for able to present. |
| Unable to present opportunity due to system not working (rare occurrences). | Refer to [Unable to Present HEE Opportunities – System Error](#_Unable_to_Present_1). |
| Member does not wish to be reminded of the programs that are available to them. | Contact the Senior Team or Supervisor for approval prior to referring to [Update Opt-Out Preferences](#_Update_Opt-Out_Preferences). |
| **5** | Select the **Save** button to complete the opportunity registration.  **Note:** Upon selecting Save, the View Opportunities screen continues to display. | |

[Return to HLP Guide](#_High_Level_Process)

[Top of the Document](#_top)

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| Unable to Present HEE Opportunities – System Error |

Perform the steps if unable to present a HEE opportunity to a member using the “View Opportunity” feature:

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| **Step** | **Action** |
| **1** | Create an email and obtain a screen shot (Using Snagit) of the problem that is occurring and paste into the email body.  **Note:** If you are unfamiliar with using the Snagit software, contact your Supervisor or the IT Service Center for Assistance. |
| **2** | Include the following Subject line:  **\*\*Securemail\*\* HEE System Issue (Contains PHI)** |
| **3** | Include the following in the **body** of the email if the information is not captured in the screen shot:   * Member’s name * Member ID * Client name * RxClaim platform |
| **4** | Forward the information, along with short description of the problem, to your Supervisor and they will open a Service Center Ticket.  **Supervisors Only:** Access **MyLife** then select“**IT Service Center**” to open an HPSM ticket.  **Note:** Vendor Supervisors without access to MyLife should contact the IT Help Desk to report the HEE Opportunities system error and open a ticket. |

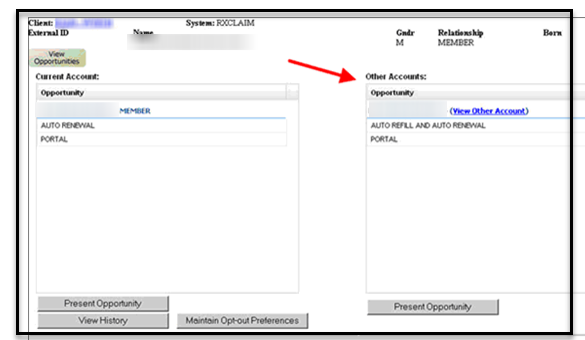
[Top of the Document](#_top)

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| Opportunities for Members with Multiple Accounts |

The View Opportunities screen displays Opportunities identified for the same person under a different client(s). This is useful for plan members with multiple linked accounts.

**Example:** Primary Medicare D coverage through SilverScript and secondary coverage through an employer plan.

**Note:** The Enterprise Patient Hub validates if the plan member has different accounts. Some of the fields used in the validation are Name (first and last), Date of Birth, Gender, Primary Address (street, postal code), Home/Work number, SSN, Coverage ID, Email address and Mobile phone. This ensures that the accounts are matched up with the correct member.



Perform the following steps:

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| **Step** | **Action** | |
| **1** | Click the **Show All Opportunities** button.  **Result:** Screen displays all Opportunities for the selected plan member, spouse, and minor dependents. (These could be opportunities under the current client or a different client). | |
| **If…** | **Then…** |
| Opportunities from other accounts are displayed on the right side of the screen | Proceed to the next step. |
| Only opportunities from the current account are displayed | Follow the steps under [Identify and Present Opportunities Steps 1-3](#_Identify_and_Present). |
| **2** | Refer to the appropriate scenario below: | |
| **If…** | **Then…** |
| Both accounts have the same opportunity (**Example:** MChoice Voluntary) | Present the opportunity while in the current account. |
| Member has multiple opportunities and going to present an Auto Refill opportunity for the secondary account  **Note:** Offer both Auto Refill and Auto Renewal at the same time **and** setup bothwhen accepted by the member. | Use the **View Other Account** hyperlink to access the other account and present the opportunity.  **Result:** Clicking this link displays the Log Activity screen for the current account, and once the call has been logged, the other account displays. |
| Member has multiple opportunities and going to present a Portal opportunity for the secondary account | Present the opportunity from the account that you are currently viewing. |
| **3** | Proceed to [Types of Opportunities in PeopleSafe](#_Types_of_Opportunities), complete the presentation of the Opportunity. | |

[Top of the Document](#_top)

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| Types of Opportunities in PeopleSafe |

Refer to as appropriate:

**Note:** For all opportunities, offer to update the members’ Messaging Preferences. Refer to [PeopleSafe - Obtaining an Email Address and Managing Messaging Platform Alerts (027674)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=918203d3-2d76-4044-b2d9-0ced0504d471) section titled: **Setting Up and Removing Messaging Preferences (MP) to update the email address and set message preferences.**

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| **Opportunity** | **Criteria to Identify Opportunity, displays as...** | **Objective** |
| **Auto Refill Program (ARP)** | Member has one or more prescriptions eligible for Auto Refill (ARP) program. | We have an automatic refill program to help ensure you do not run out of your medication. We will send you an email, call, or text 23 days before your refill is due and you confirm or cancel your refill. In addition, when your prescription expires or is out of refills, we will contact your doctor to get a renewal.  **Note:** Offer both Auto Refill and Auto Renewal at the same time and setup both when accepted by the member.  For setup information, refer to [PeopleSafe - Auto Refill Program (ARP) (022387)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=89a5f1e4-2fea-404a-a5f8-6e50549eb3de). |
| **Hollister**  **Livongo Diabetes Program** | Members will be asked if they are being treated for diabetes. | Members being treated for Diabetes.  Through the Livongo program you may be eligible to obtain your diabetes medication at $0 cost.  The Livongo program will:   * Help you to better manage the effects of diabetes * Improve your quality of life * Help save you money   Contact Livongo at welcome.livongo.com/BCBSIL or by calling **1-(800) 945-4355**. |
| **Aetna Medicare Advantage and Special Needs Plan**  CCRs should only present this opportunity if they have been trained on the process for presenting the opportunity. | The beneficiary may benefit from education and enrollment in an Aetna Medicare Advantage and Special Needs Plan. | The beneficiary may qualify for extra vision, dental, hearing, and other benefits within one of our Aetna Medicare Advantage and Special Needs Plans.  For additional information refer to [MED D – SilverScript Medicare Advantage and Special Needs Plans Benefit Opportunity (052963)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5746d3d7-1f02-44e1-9429-9deb4fbe2f77). |
| **Retail to Home Delivery/Mail Order** | Member is filling prescriptions at retail and has mail service benefits available. | Educate the member on the benefits of using Home Delivery / Mail Order service and offer to initiate a new Rx request for mail service.  Refer to [Rx Transfer (004726)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=db939cc1-1f5e-44de-89df-985827477553), section titled: Member Request for Transfer of Retail Prescription to Home Delivery/Mail Order Pharmacy. |
| **Maintenance Choice (Voluntary or MChoice Incentivized)** | Member is eligible for the Maintenance Choice Voluntary program. | Educate the member on the benefits and cost savings of receiving a 90-day supply and offer to assist the member with switching to Home Delivery/Mail Order pharmacy or our retail Pharmacy to receive the full benefits of the program.   * Refer to:   + [PeopleSafe - Handling Maintenance Choice Calls (021863)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e0d014db-0726-40a1-bf1b-c48f9fbdabb3)   + [Create Opportunity and Maintenance Choice (MChoice) Transfer (021315)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0a402678-3e98-4204-b4cf-08a5e9d5f68b)   + [PeopleSafe - Maintenance Choice Opt Out (058982)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=20791340-d563-44f1-a4ef-e7d39a495112) |
| **Electronic EOB**  (Explanation of Benefits) | MED D member is eligible for the program. | This opportunity educates the beneficiary about the option to receive monthly Explanation of Benefits (EOB’s), online instead of by mail.  The paperless EOB provides the same information in the same format as the EOB the member receives in the mail, only it is faster and more convenient. |
| **Proactive Home Delivery / Mail Order Renewal** | Members are eligible for the Home Delivery/Mail Order program. | Educates the members that they have medications that were previously filled by the Mail Order pharmacy but are currently out of refills.  As a courtesy, we can offer to do a one-time request to their doctor to get a new prescription for a 90-day supply.  Refer to [PeopleSafe - Obtaining a New Prescription (Rx) for the Member (058827)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a1443f4f-499e-442c-be11-fd2b207bf86c). |
| **Member Engagement Program** | The members we have targeted as part of the Member Engagement Program are members who contact customer care multiple times per month for various issues. | Review the member’s profile and call history to pre-empt any future needs.  The following Opportunities include:   * Refill Pull Forward * Enroll in ARP * Enroll in Email/Text alerts * Quick Registration * Electronic EOB (Explanation of Benefits)   Refer to [Member Engagement Program](#_Member_Engagement_Program) in this document. |
| **Medication Therapy Management (MTM) Program** | This program will help members to better understand the purpose and use of their medications for those that fit into the following criteria:   * Have three (3) or more of the targeted chronic diseases * Are taking 8 or more prescription maintenance medications * Are likely to have drug costs that exceed $4,376 per year for 2021   **Note:**  This is total drug cost and not the member out-of-pocket cost. | The MTM program is offered as part of your health plan benefits and is designed to help you understand how to safely and effectively use your medications.  The program includes:   * An annual comprehensive medication review, usually completed with a pharmacist, which includes your over the counter and prescription medications * Development of an up-to-date Personal Medication List and Medication Action Plan that can be shared with your prescribers * Targeted medication reviews throughout the year focused on appropriate medication use, effectiveness, and safety as needed   You will be contacted by a pharmacist or other healthcare professional after you qualify with an offer to complete your annual comprehensive medication review. Your annual comprehensive medication review will usually take 15-30 minutes. You can schedule this review at a time that is most convenient for you.   * To sign up for this program, call the Patient Engagement Team (PET) at **1-855-905-4689**.   For additional information, refer to[Medication Therapy Management (MTM) Program (045179).](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=2c17e7ae-19b2-49d1-b36d-60aea82b47c2) |
| **Digital Enablement Campaign** | The Member Engagement Program includes the Digital Enablement Campaign.  The purpose is to increase the number of members who have access to self-service website options and with whom we are able to communicate through our email and text messaging programs. | The following Opportunities include:   * [Enroll in Email/Text alerts](#_Enroll_in_Email/Text) * [Enroll in ARP](#_Enroll_in_Automatic) * [Refill Pull Forward](#_Refill_Pull_Forward)   **Note:** HEE has been configured to only present one Member Engagement Program opportunity per call. Logic has been added to prioritize opportunities in the following order: 1) email, 2) text, 3) Automatic Refill. |

[Top of the Document](#_top)

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| Update Opt-Out Preferences |

** Internal Only (Do Not Communicate to Member):**  The only time we would Opt Out a member is when they request it or to prevent escalation. Once Opt Out is selected, it will not redisplay as a future option. The Opt Out would expire if the member has a new plan or if they requested the Opt Out to be removed. This does not apply to the MTM program.

Perform the steps below:

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| **Step** | **Action** |
| **1** | Select the **View Opportunities** drop-down box located at the top right of the screen then select the appropriate member from the drop-down box.  **Result:** Open Opportunities screen displays. |
| **2** | Click the **Maintain Opt-Out Preferences** button.  **Result:** Setup Opt-Out Preferences screen displays. |
| **3** | Select the checkboxes for the appropriate opt-out options. Options are sorted and can be customized by:   * Member name * Opportunity type (**Example:** Auto Refill and Renewal (ARR), Maintenance Choice, Flu Vaccine) * Channel (**Example:** Print, our Home Delivery/Mail Order Web Portal, Retail, MinuteClinic, Inbound IVR, Outbound IVR or Messaging Platform) |
| **4** | Click the **Save** button to confirm the opt-out preferences then click the **Back** button to return to the previous screen. |

[Top of the Document](#_top)

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| Member Engagement Program |

This member has been identified as a frequent caller regarding Order Status and Order Placement and has a complex history of service-related issues. Assist the member with their concerns, then follow the action steps below to find opportunities to prevent future service needs.

**Benefits:**

* Minimizes the need for the member to call back
* Optimizes the way we communicate with the members regarding their order status
* Provides convenient self-service options for the member for order placement, checking order status, and managing their benefits

**Action:**

Refer to the below process section depending on the opportunity being offered:

* [Refill Pull Forward](#_Refill_Pull_Forward)
* [Enroll in ARP](#_Enroll_in_ARR)
* [Enroll in Email/Text alerts](#_Enroll_in_Email/Text)
* [Quick Registration](#_Quick_Registration)
* [Electronic EOB (Explanation of Benefits)](#_Electronic_EOB_(Explanation)

[Top of the Document](#_top)

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| Refill Pull Forward |

This opportunity allows the member to order their refills in advance, so they do not have to call us when the prescription is due for a refill.

Complete the steps below:

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| |  |  | | --- | --- | | **Step** | **Action** | | **1** | Review member Prescription History and identify any prescription that is due for refill within one to two weeks. | | **2** | Verify that the member wants the prescription to be refilled.   * If the refill is Too Soon, continue to place the Refill order and place in Future Fill then explain to the member that the order will process at the correct time and they will not need to call us back. | | **3** | Place the refill order. Refer to [PeopleSafe - Prescription (Rx) Refill/Renewal (Order Placement) (004628)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=932f2f09-4581-4c2c-861d-5145ad7ab97a) then disposition the HEE appropriately. Refer to [Dispositioning HEE Opportunities - Coaching (012513)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=acacf7b9-01ae-49b7-9dd6-0325adde6c7d). | |

[Top of the Document](#_top)

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| Enroll in Automatic Refill Program (ARP) |

This opportunity allows members to automatically receive maintenance prescription refills at the appropriate time, without having to manually place the order.

Perform the steps below:

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| |  |  | | --- | --- | | **Step** | **Action** | | **1** | Review member Prescription History and identify any prescription that is eligible for enrollment in ARP. | | **2** | Verify with the member that they wish to enroll the prescription then enroll the prescription in ARP. Refer to [PeopleSafe - Auto Refill Program (ARP) (022387)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=89a5f1e4-2fea-404a-a5f8-6e50549eb3de) or [MED D - Automatic Refill Program (ARP) (001628)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e3ab4f62-8326-4288-acb8-4adc6994fdd8).  **Note:** Offer both Auto Refill and Auto Renewal at the same time **and setup both when accepted by the member**. | | **3** | Disposition the HEE appropriately. Refer to [Dispositioning HEE Opportunities - Coaching (012513)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=acacf7b9-01ae-49b7-9dd6-0325adde6c7d).  **Note:** If the prescription shows Denied for Refill Too Soon on the final Order Placement screen. | | **4** | Place the refill order. Refer to [PeopleSafe - Prescription (Rx) Refill/Renewal (Order Placement) (004628)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=932f2f09-4581-4c2c-861d-5145ad7ab97a).  **Note:** It will process and show as Future Fill. | | **5** | Explain to the member that the order will process at the correct time and they will not need to call us back then disposition the HEE appropriately. Refer to [Dispositioning HEE Opportunities - Coaching (012513)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=acacf7b9-01ae-49b7-9dd6-0325adde6c7d). | |

[Top of the Document](#_top)

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| Enroll in Email/Text Alerts |

This member has been identified as primarily a Retail caller and may benefit from education and enrollment in email alerts.

**Retail Benefits:**

To be able to communicate important updates like plan changes, savings opportunities, and digital tools available online or mobile app to help them get the most out of their prescription benefits (such as network, price medications, and find answers to common questions).

**Mail Benefits:**

* Get the most current status and/or updates regarding your mail order prescriptions without having to call us.
* Review alerts at your convenience without the disruption of a phone call.
* Provide easy access to check your order status or place an order online.

Perform the steps below:

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| |  |  | | --- | --- | | **Step** | **Action** | | **1** | Click on the **Change Contact** **Info** button then verify the correct phone and email address are on file. If not, update appropriately. Refer to [PeopleSafe - Address Email and Phone Number Changes (004566)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a09925d4-9dbb-407b-b579-c17eec6e62ee). | | **2** | Explain the benefits of email and text alerts to the member then offer the member enrollment into email and text alerts.   * If the member accepts, continue to the next step. * If the member declines, disposition appropriately. Refer to [Dispositioning HEE Opportunities - Coaching (012513)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=acacf7b9-01ae-49b7-9dd6-0325adde6c7d). | | **3** | Enroll the member in email and text alerts. Refer to [PeopleSafe - Obtaining an Email Address and Managing Messaging Platform Alerts (027674)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=918203d3-2d76-4044-b2d9-0ced0504d471) then disposition the HEE appropriately. Refer to [Dispositioning HEE Opportunities - Coaching (012513)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=acacf7b9-01ae-49b7-9dd6-0325adde6c7d). | |

[Top of the Document](#_top)

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| Quick Registration for Caremark.com |

This opportunity allows the member to receive a quick registration email where they can setup a profile on Caremark.com that will enable them to quickly order their prescriptions and view various other account and prescription information at any time.

Perform the steps below:

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| |  |  | | --- | --- | | **Step** | **Action** | | **1** | I am going to send you an email with a personalized registration page on Caremark.com. You will be able to check the order status, order refills, and check drug costs and coverage. | | **2** | Offer the Quick Registration hyperlink to the member. Refer to [Quick Registration for Caremark.com (012470)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c90a32de-421f-42c2-8d5c-69ce36571418) or [Quick Registration and Comeback to Caremark.com (006087)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f07ebe0d-f3b8-47ed-b83a-0dcf9cc63c13) then disposition the HEE appropriately. Refer to [Dispositioning HEE Opportunities - Coaching (012513)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=acacf7b9-01ae-49b7-9dd6-0325adde6c7d). | |

[Top of the Document](#_top)

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| Electronic EOBs (Explanation of Benefits) |

Only Medicare Part D beneficiaries will receive automatic EOB statements.



This opportunity provides the member with the ability to receive electronic/paperless Explanation of Benefits (EOBs) at any time.

Perform the steps below:

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| |  |  | | --- | --- | | **Step** | **Action** | | **1** | Explain the benefits of the Electronic EOB to the member and offer to enroll them.   * If member accepts, continue to next step. * If member declines, [Disposition the HEE (012513)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=acacf7b9-01ae-49b7-9dd6-0325adde6c7d) appropriately.   **Note:** Explain to the member that future enrollments in Electronic EOB can be requested on Caremark.com. | | **2** | Enroll the member in Electronic EOB. Refer to [MED D - Electronic EOBs (101602)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=eeb4b2b7-f5f0-471f-93ef-3c57939c5ae8) and [disposition the HEE (012513)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=acacf7b9-01ae-49b7-9dd6-0325adde6c7d) appropriately. | |

[Top of the Document](#_top)

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| Related Documents |

[Log Activity/Capture Activity Codes (005164)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bdac0c67-5fee-47ba-a3aa-aab84900cf78)

[Member Engagement Call Flow (023057)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18ad4891-9af6-4a07-bb7d-be0fc1119654)

[Health Advisor Program (Medical Cost Avoidance & Site of Care) (061330)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a296b722-c0b8-4816-a2dc-0bf99cf86c64)

[Customer Care Abbreviations, Definitions, and Terms (017428)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c1f1028b-e42c-4b4f-a4cf-cc0b42c91606)

**Parent Document:** [CALL 0049 Customer Care Internal and External Call Handling](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0049)

[Top of the Document](#_top)

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