**Compass – Outbound Guided Caller Authentication**

[Outbound Guided Caller Authentication](#_Toc207274839)

[Outbound Calls Authentication Scenario Guide](#_Toc207274840)

[Related Documents](#_Toc207274841)

**Description:**Guided Caller authentication steps and functionality for Compass when outbound calls are made. This Work Instruction should only be used if you are an offline agent or working on an outbound call initiative.

|  |
| --- |
| **Outbound Guided Caller Authentication** |

 Outbound authentication can only be performed through Compass when Five9 is engaged within the Compass platform. **Do Not** use the Five9 Standalone app to initiate outbound calls.

Follow the steps below for outbound calls:

|  |  |  |
| --- | --- | --- |
| **Step** | **Action** | |
| **1** | From the **Search by Member** screen, locate the member’s account the outbound call is being made on. Refer to [Compass – Member Search (050037)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44e71d7a-1b1c-4931-9089-d4161a72d114) as needed. | |
| **2** | Once the member’s account is located, click the **Member ID** hyperlink to access the member’s account.  **Result:** Accessing Member Information pop up displays | |
| **3** | 1. Click the checkbox “I am working offline (no active call).”   A screenshot of a computer  AI-generated content may be incorrect.   1. Click **Continue**   **Result:** Member’s account is accessed through an Interaction Case | |
| **4** | 1. Complete the **Primary Interaction Reason** pop up. 2. Review any **Alerts**, **Member’s Recent Cases**, **Member’s Recent Support Tasks**, and **Claims** history for relevant information before making the outbound call. | |
| **5** | Click **New Call** to initiate a new Manual Outbound call.  For the full process, reference [Compass - Five9 Agent Desktop Phone (056045).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad8f7284-fee0-4ae1-bbbd-d2cbe07a331f)  **Result:** Answering Party’s Information screen displays | |
| **6** | In the **Member** dropdown, select the member for which the research case outbound call was made.   If multiple research cases are opened, the member’s name will be selectable for each research case opened.  A screenshot of a computer  AI-generated content may be incorrect. | |
| **If Answering Party is…** | **Then…** |
| Unable to speak, did not answer, needs a callback, or any other reason cannot proceed with authentication. | 1. Complete the **Member**, **Reason for Outbound Call**, and **Who are you Calling** dropdowns. 2. Click **Cancel Authentication**. 3. Choose the **Reason for Canceling** from the dropdown menu in the pop-up window that displays and then click **Cancel Authentication**.   A screenshot of a computer  AI-generated content may be incorrect.  **Result:** The Member’s Research Case will automatically close. |
| Able to accept call | 1. Complete the following fields based on the appropriate party that answered:  * **Reason for Outbound Call** dropdown select:   + Survey Follow-Up   + Callback Task   + Outbound Call Campaign   + Member Follow-Up   + Other (Other Reason free text box will populate, selected) * **Who are you calling** dropdown selection:   + Member/Self   + Family Member/3rd Party   + Retail Pharmacy   + Provider/Prescriber   + Other (Other Relationship free text box will populate, if selected) * **Answering Party’s Name** (Free Text)   **Note:** If Retail Pharmacy, Provider/Prescriber is selected in the Relationship to member a field for Position/Title displays.    Reference [HIPAA (Health Insurance Portability and Accountability Act) Grid – CVS (028920)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce) for information that can and cannot be released.   1. Once all applicable fields are complete, click **Next.**   **Result:** Authentication Informationscreen displays. Research Case is now an Interaction Case. |
| **7** | 1. Complete the Authentication Information token screen.  * If Retail Pharmacy, Provider/Prescriber was selected the Authentication screen displays, validate (check box) the member’s name and call recording disclaimer.   A close-up of a sign  AI-generated content may be incorrect.   * If member/self/family member/3rd party was selected, continue with the below.      To ensure member privacy I need to confirm the following:  **Category 1:**   * + Confirm you called the phone number on file for the member   **Category 2:**   * + Member’s Full Name (This box can be marked as this was verified during call opening)   **Category 3:**  Any one of the following can be selected for **Category 3**:   * + Member’s Birth Year   + Member’s Month and Day of Birth   + Member’s Zip Code   + Member’s Street Name  1. Click the boxes when each authentication requirement is met.   A screenshot of a computer  AI-generated content may be incorrect.    I need to let you know that this call is being recorded or monitored for quality purposes.   1. Once read to the answering party, click the checkbox: “**I have advised the answering party of the above information**.”   **Result:** Continue button illuminates.   1. Click **Previous** to return to the Answering Party’s Information screen.    * If the answering party is unable to fully authenticate, click **Cancel Authentication**.      + Inform the Answering Party:  You can call another time when the authenticating information can be verified.      + Provide the Customer Care Phone Number in the CIF for the callback phone number.    * If the answering party is fully authenticated, click **Continue**. | |
|  |

[Top of the Document](#_top)

|  |
| --- |
| **Outbound Calls Authentication Scenario Guide** |

Follow the steps below for outbound call scenarios:

|  |  |  |
| --- | --- | --- |
| **Scenario** | **Action** | |
| No answer/Voicemail | * End the call. * Click **Cancel Authentication**. * Choose the **Reason for Canceling** from the dropdown menu in the pop-up window that displays, select an appropriate reason, and then click **Cancel Authentication**. * The member’s case will automatically close after selecting **Cancel Authentication**. | |
| Outbound Call has **not** been outbound call authenticated and Family Member/3rd party on the account answers and wants to discuss their own account. | * Close the Case for the member for whom the outbound call was initiated for, after the outbound call has been made. * In the Answering Party’s Information screen, from the Member dropdown, select **Other**. * Click the **Continue to Member Search** button. * Perform a manual search for the Family Member’s/3rd party account on the **Search (New UI)** tab. Refer to [Compass – Member Search (050037)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44e71d7a-1b1c-4931-9089-d4161a72d114) as needed. * Proceed through an Interaction Case and follow the Guided Authentication process for the inbound call flow. Refer to [Compass – Guided Caller Authentication (050163)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=80476f74-7dca-4548-bf35-185ca8d45c13) as needed. | |
| Outbound Call **has** been outbound call authenticated and Family Member/3rd party on the account answers and wants to discuss their own account. | * Close the Case on the account the outbound call was initiated for, after the outbound call has been made. * Perform a manual search for the member’s account they want to discuss on the **Search (New UI)** tab. Refer to [Compass – Member Search (050037)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44e71d7a-1b1c-4931-9089-d4161a72d114) as needed. * Proceed through an Interaction Case and follow the Guided Authentication process for the inbound call flow. Refer to [Compass – Guided Caller Authentication (050163)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=80476f74-7dca-4548-bf35-185ca8d45c13) as needed. | |
| Outbound Call **has** been authenticated and the original caller requests to discuss a 3rd party's account next. | If the **fully authenticated** 3rd party provides verbal permission (over the phone) to discuss or share their medical/personal information and/or make changes with the original caller, the original caller may be treated as an authorized representative for **this call only.** If the 3rd party caller is not available to give permission the original caller is now the 3rd party caller.   * Close the Case on the account the outbound call was initiated for, after the outbound call has been made. * Perform a manual search for the member’s account they want to discuss on the **Search (New UI)** tab. Refer to [Compass – Member Search (050037)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44e71d7a-1b1c-4931-9089-d4161a72d114) as needed. * Proceed through an Interaction Case and follow the Guided Authentication process for the inbound call flow. Refer to [Compass – Guided Caller Authentication (050163)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=80476f74-7dca-4548-bf35-185ca8d45c13) as needed.   Refer to the [HIPAA grid (028920)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce) for what can and cannot be released to a 3rd party caller | |
| Member has two accounts and wants to discuss the account agent did not initially call on, and initial account has **not** been outbound calling authenticated. | * Close the Case on the account the outbound call was initiated for, after the outbound call has been made. * In the Answering Party’s Information screen, from the Member dropdown, select **Other**. * Click the **Continue to Member Search** button. * Perform a manual search for the member’s account on the **Search (New UI)** tab. Refer to [Compass – Member Search (050037)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44e71d7a-1b1c-4931-9089-d4161a72d114) as needed. * Proceed through an Interaction Case and follow the Guided Authentication process for the inbound call flow. Refer to [Compass – Guided Caller Authentication (050163)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=80476f74-7dca-4548-bf35-185ca8d45c13) as needed. | |
| Member has two accounts and wants to discuss account agent did not initially call on, and initial account **has** been outbound calling authenticated. | * Close the Case on the account the outbound call was initiated for, after the outbound call has been made. * Perform a manual member search for the member’s account they want to discuss on the **Search (New UI)** tab. Refer to [Compass – Member Search (050037)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44e71d7a-1b1c-4931-9089-d4161a72d114) as needed. * Proceed to click the checkbox “I am working offline (no active call),” to access the account the member wants to discuss. Confirm the members’ information matches the same from the initial account called on. * If the members’ information is the same as the initial account called, no further authentication is needed. * If the member information is different from the initial account called, proceed through an Interaction Case and follow the Guided Authentication process for the inbound call flow. Refer to [Compass – Guided Caller Authentication (050163)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=80476f74-7dca-4548-bf35-185ca8d45c13) as needed. * If at any time the member wants to discuss another cardholder on the account, close the case and perform a manual member search. Proceed through an Interaction Case and follow the Guided Authentication process for the inbound call flow. Refer to [Compass – Guided Caller Authentication (050163)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=80476f74-7dca-4548-bf35-185ca8d45c13) as needed. | |
| Answering Party indicates the number dialed is wrong number | * Apologize to Answering Party for the call. * Notate the Open Case that Outbound Call was made, and the phone number dialed was incorrect * Complete required fields in the Answering Party’s Information screen and click **Cancel Authentication.** * Choose the **Reason for Canceling** from the dropdown menu in the pop-up window that displays, select Member Not Available and then click **Cancel Authentication**. * The member’s case will automatically close after selecting **Cancel Authentication**. | |
| Answering Party indicates the Member is deceased | When handling a call regarding a deceased member, it is important to express empathy.    **Example:**   I am sorry you are going through this. On behalf of <PBM Name>, please accept our sincere condolences for your loss.  Determine if the Answering Party can authenticate the deceased member. | |
| **If answering party…** | **Then…** |
| Can fully complete authenticators. | Proceed with call as normal as described in Outbound Guided Caller Authentication section above, then refer to [Compass – Mail Order Calls Regarding Deceased Members (064870)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=84208228-6cf3-46fd-ae5a-14624e9f04c0) on how to proceed with the call. |
| Cannot fully complete authenticators. | * + Close the Case on the account the outbound call was initiated for, after the outbound call has been made.   + Perform a manual search for the member’s account on the **Search (New UI)** tab. Refer to [Compass – Member Search (050037)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44e71d7a-1b1c-4931-9089-d4161a72d114) as needed.   + Proceed through an Interaction Case and follow the Guided Authentication process for the inbound call flow Guided Authentication process. Refer to [Compass – Guided Caller Authentication (050163)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=80476f74-7dca-4548-bf35-185ca8d45c13) as needed.   + Once the Authentication Information screen is reached, if Family Member/3rd party cannot authenticate, click the **Trouble Authenticating** link, select **Other** as the Authentication Bypass Reason and notate the member is deceased. Refer to the Trouble Authenticating scenario Guide in [Compass – Guided Caller Authentication (050163)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=80476f74-7dca-4548-bf35-185ca8d45c13) as needed.   Refer to [Compass – Mail Order Calls Regarding Deceased Members (064870)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=84208228-6cf3-46fd-ae5a-14624e9f04c0) on how to proceed with the call. |
| Answering Party indicates **DO NOT** **CALL**. | * If the Answering Party is a member, inform the Answering Party you will need to authenticate their account to access it. Once authenticated, refer to [Compass – Do Not Call (DNC) Support Task (065139)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3e14aa94-c2e1-4f86-a2d3-f9c2bc328c38). * If the Answering Party is a non-member stating they are getting calls in error, they must contact Corporate/Enterprise IVR email [Adherence.Operations@CVSHealth.com](mailto:Adherence.Operations@CVSHealth.com). | |

[Top of the Document](#_top)

|  |
| --- |
| **Related Documents** |

**Parent Documents:** [CALL 0011 Authenticating Callers](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0011),  [CALL 0049 Customer Care Internal and External Call Handling](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0049)

[HIPAA (Health Insurance Portability and Accountability Act) (028920)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce)

[Compass – Member Search (050037)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44e71d7a-1b1c-4931-9089-d4161a72d114)

[Compass – Guided Caller Authentication (050163)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=80476f74-7dca-4548-bf35-185ca8d45c13)

[Compass - Five9 Agent Desktop Phone (056045)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad8f7284-fee0-4ae1-bbbd-d2cbe07a331f)

Compass – Mail Order Calls Regarding Deceased Members (064870)

[Compass – Do Not Call (DNC) Support Task (065139)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3e14aa94-c2e1-4f86-a2d3-f9c2bc328c38)

[Top of the Document](#_top)

Not To Be Reproduced or Disclosed to Others Without Prior Written Approval

**ELECTRONIC DATA = OFFICIAL VERSION – PAPER COPY = INFORMATIONAL ONLY**