# CCR Knows the Caller Personally

[Process](#_Toc161654200)

[Related Documents](#_Toc161654201)

**Description:** Instructions on how to handle a call where you personally know the caller.

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| Process |

HIPAA guidelines do not prevent a CCR from handling this type of call, because CCRs are expected to keep all PHI and PII strictly confidential, regardless of whether they know the caller. However, if the CCR does not feel comfortable handling the call, or if the caller recognizes the CCR and is hesitant to continue, the CCR may offer to warm transfer the call elsewhere for assistance.

Perform the steps below:

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| **Step** | **Action** | |
| **1** | Icon - Conversation Since we know each other, do you feel comfortable discussing your information with me?  Refer to [Universal Care – Caller Authentication (004568)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bcb8da72-5501-4631-b9fd-fe675bc4a1fd) and [Universal Care – Consultative Call Flow (CCF) Process (095822)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c954b131-7884-494c-b4bb-dfc12fdc846f). | |
| **If the member…** | **Then…** |
| Is okay with the CCR continuing with the call, or prefers not to be transferred | Handle the call as normal. |
| Asks for or agrees to be transferred | Warm transfer and properly introduce the caller to the [Senior Team (016311)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9eef064d-c7d7-42f7-9026-1497496b4d51) and advise them of the situation. |

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| Related Documents |

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

[CALL 0011 Authenticating Caller](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0011)

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

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