# PeopleSafe - Participant (Member) Callback Request

[Reminders](#_Toc163820439)

[Process](#_Toc163820440)

[Turnaround (TAT) Time](#_Toc163820441)

[Related Documents](#_Toc163820442)

**Description:** This task is utilized for specific situations when a callback is required according to a process. This document outlines the time when it is and is not appropriate to use this task.

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| Reminders |

**Do not use if the member is escalated.**

 Do not create callback tasks when submitting the following tasks:

* PBO tasks: Callbacks are automatic when the PBO task is worked.
* Account Executive tasks: Callbacks are automatic when the Account Executive Task is worked.
* Med D Grievances: Grievance Team places an outbound call to the beneficiary within the 30 day turnaround time - Refer to [MED D – Grievances Index (007931)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=71364003-a41f-4b84-be24-1e85435462b2).
* **When a member has Messaging Platform (MP), do not create callback tasks for general notifications about orders status or order placement.**
* Offer to update the member’s Messaging Platform (MP) preferences so that they will receive an automated phone call, text message, or email. Refer to [Obtaining an Email Address and Managing Messaging Platform Alerts (027674)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=918203d3-2d76-4044-b2d9-0ced0504d471).
* The Messaging Platform (MP) notifies the member when their order is placed, shipped, delayed, etc. and the member can specify the types of notifications they want to receive.

Use for the following circumstances:

* When instructed within a specific procedure
* When the CIF directs you to send an RM Task
* When associated with a RM Parent task (unless it is a Reship). RM Parent task is the original task.
* When the member specifically asks for a callback in conjunction with a parent RM task. In this scenario, you must indicate in the callback task **note**s that the member requested the callback. We will complete the call back and attempt to speak directly to the member. If the member is unavailable, but a family member/authorized party is available, and able to fully authenticate the call, we will then proceed with the call back.

**Note:** Participant Callback request is ONLY to be used in conjunction with a parent RM task. If a member just requesting a call back not related to the outcome of an RM task, please contact your supervisor for assistance.

[Top of the Document](#_top)

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| Process |

Perform the steps below if a callback task needs to be created:

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| **Step** | **Action** |
| **1** | Go to **Resolution Manager** then on the **Create a Task** screen or **Reship** screen, select the applicable task category and typeand complete the requested fields. |
| **2** | Click the **Save and Create Callback** button.  **Result:** Verification dialog box containing the Task ID displays.  **Note:** If there is not a **Save and Create Callback** button for the task in question, select **Save and Clear** thencopy the task # in the pop-up, and create a second task as described below then proceed to Step 3.   * **Task Category:** Customer Care Internal Process * **Task Type:** Participant Callback Request * **Queue:** Nashville for Medicare D clients, **or** Richardson for CVS Commercial clients |
| **3** | Fill in the **Original Task ID**, **Original Task Category** and **Task Description**, if not populated. |
| **4** | Verify the contact name and phone number if shown on the screen then edit the information if needed then select the best time to call. |
| **5** | Add notes describing the reason for the callback request.  **Note:** If the callback is for an Eligibility task for no member on file, include the member’s details in the callback task notes.  This includes:   * Member ID (if available) * Member name * Member DOB * Client Code |
| **6** | Click the **Save and Close** button then click **OK**.  **Result:** Verification dialog box displays, confirming the callback information has been saved. The Customer Care Research team completes Participant Callback Requests only when associated with an RM parent task unless it is a reship. |

[Top of the Document](#_top)

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| Turnaround (TAT) Time |

The PBM will contact member within 3 business days for most tasks, although some may take up to 5 business days or longer. Refer to [Resolution Manager (RM) Task Types and Uses (029980)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3438a8ea-9ad1-4c4b-b710-57dab144493c) for accurate Turnaround Times for your specific task.

If a callback was requested, inform the member that the PBM will contact them within the stated time and will continue to update them until the matter is completed.

[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)

[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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