# Being a Power House Taking Ownership

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**Description:** Reminders and expectations on how to effectively identify, handle, and resolve issues to ensure that every customer is highly satisfied with their call experience. Take ownership to resolve issues or concerns, when possible, on the first contact.

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| Identify the Issue |

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Taking ownership minimizes escalations, prevents call backs, and provides a positive experience for the caller. Be resourceful and take all steps within your capacity to assist a caller.

Listen for key phrases from the caller:

* Caller states they are having trouble filling their medication
* Caller expresses dissatisfaction with PBM
* Caller mentions they have previously called: Check for notes about ongoing issues
* Caller asks to speak to another employee: Convey that you can assist with their issue

Ask probing questions:

* Caller asks questions about a recent order: Verify the order/medications of which they are referring to. (**Reminder:** There could be multiple recent orders.)
* Caller mentions an issue with a medication: Review all areas on the account for information (do not just look at the Main Screen)
* Find out how much medication they currently have on hand to help identify a resolution

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| Fully Research Notes |



Review notes on account on every call:

* Identify if this is an ongoing issue by:
  + Checking the View Activity tab
  + Viewing notes at the member level, prescription, and order level
  + Looking for Tasks previously created and if closed/ open
  + Review Communications tab and determine if outbound calls have been made
  + Note the REPEAT CALLER # towards the top of the account in red text

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| Attempt to Resolve the Issue |



To demonstrate you are taking **responsibility** to assist the caller, and are **committed** to take the appropriate actions towards resolution:

* Have confidence and use the first person “I,” to reassure the caller that you will help to resolve their issue.
* Set agreed upon expectations, acknowledge the realistic Turn Around Time (TAT). Be aware of upcoming holidays/weekends that could extend the TAT.
* Use theSource, HEE, and Client Program offerings to EDUCATE the member with plan benefits to prevent future issues reoccurring.
* Be positive, use positive words, phrases, and resolve statements to explain to the caller what you will do and by what date.
* Verify the resolution of the issue and estimated TAT coincides with the member having enough medication on hand.
* Leave detailed notes about the reason for the call, any agreed upon expectations to resolve.

If applicable, review the Tasks previously submitted:

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| **If…** | **Then…** |
| There is no task, and one is necessary | Create the appropriate task. |
| Task is open and within the turnaround time | Advise caller of the status. |
| Task is open and outside the turnaround time | Contact the Senior Resolution Team to have the task escalated. |
| Task is closed | Advise caller of status. Provide further options, if applicable. |
| No task is required | Attempt to resolve the issue. If not resolved, reach out to the Senior Resolution Team for guidance. The Senior representative will advise you on how the call should be handled and determine if they will take over the call.  If it is an ongoing issue, do everything possible to resolve the issue. This may include first reviewing the specific CIF for available overrides or resolution processes, asking in Microsoft Teams group chat or your supervisor for assistance, warm transferring to the Senior Team for assistance with resolving the member’s issue. Any action required outside of your abilities needs to be properly handed off to those with the ability to resolve the issue. |
| We have reached to out to the doctor’s office but we have not received any information | Refer to [Being a Power House: Talking to Members About Doctor (MD) Outreach (006476)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=02642d70-f4cf-4582-b72c-cb85c3a11776). |

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| Related Documents |

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

[Service Excellence - Customer Experience Guidelines and Expectations (020070)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=fdcd68a6-f9f7-4dad-a08f-59c452d2b2d6)

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