# PeopleSafe - Calling Issues Messaging Platform or Automated Outbound Calls and Do Not Call

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**Description:** Information about Outbound calls that the member may receive from us (outbound calls) and how to identify those calls in PeopleSafe. It includes how to correct the types of calls that our members receive along with instructions for adding to the Do Not Call list.

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| Automated Outbound Calls |

Our Pharmacy Benefit Manager works with a number of vendors to provide different types of automated outbound calls. Many of these utilize a “self-service” IVR system, where the member can obtain information and perform certain actions.

If a call is received from a member regarding an automated outbound call, review the **Communication History** screen, **View Activity** screen, **View Comments** screen and **Alert History** (Messaging Platform) for recent communications to the member. Review the PA status tab for a recent update.

View content changes in CHV **(Communication History Viewer)** and CTI Call types.

* **CTI Call Type**: OBIVRXferRefillAvail
* **CHV**: Order Shipped: Notified member than an order has been shipped, if 6 or more Rx’s in alert, no specific Rx Info (Informational) is provided.
* Prescription ending in 1000
* Prescription ending in 2000
* Prescription ending in 3000
* Prescription ending in 4000
* Prescription ending in 5000

**Notes:**

* Call dispositions are not captured in real time as there is a delay from when the member responds to the IVR and when the information is visible. Welltok sends disposition data at regular intervals, however information is not visible until the vendor communicates the batch.
* Messaging Platform (MP) alerts are visible in real-time; however, non-Messaging Platform communications may take up to **1 business day** to be loaded in PeopleSafe.
* It may be up to four (4) hours from the time that the members took action in the Outbound IVR to the time that it displays in the PeopleSafe or the portal.
* Many of our automated outbound calling vendors provide a reference number, security ID, or PIN at the end of their message. These numbers are assigned by our vendors and serve as a unique identifier.
* Customer Care does not have the ability to cross-reference these numbers in PeopleSafe or other systems. The number should only come into question if there is an escalation or other need for the business to find a specific call made by the vendor’s system.

**Primary types of Automated Outbound Calls:**

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| **General Call type** | **Description** |
| Messaging Platform Automated Calls | The most common automated outbound calls are initiated through Messaging Platform.  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)  These include informational types of calls, such as order status, refill reminders, savings alerts, and those associated with the [Auto Refill Program (ARP) (022387)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=89a5f1e4-2fea-404a-a5f8-6e50549eb3de).  **Note:** Members transferred to Care from the [O/B (Outbound) (051691)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=20f5315d-1c5a-4d73-ac90-3b41be78d016) (Outbound) [IVR (051681)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7980fd12-104b-4071-94f5-3dee9c060cb0) (Interactive Voice Response) are fully authenticated**.** |
| Automated Refill Adherence Calls | These are interactive calls that inform the member they are overdue for a refill and provide the opportunity to order the prescription through the IVR where members have the opportunity to provide consent to refill prescription(s).  **Note:** Members transferred to Care from the OB IVR are fully authenticated.  Records of these calls are found on the Communication History screen. |
| Miscellaneous informational and promotional automated calls | These calls are initiated for varying reasons.  **Note:** Members transferred to Care from the OB IVR are fully authenticated.  These communications can be viewed within the **View Activity** screen.    **Note:** The calls can also be viewed under View Comments. |

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| Automated Calling Issues |

Perform the following steps when a member reports an automated call issue:

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| **Step** | **Action** | |
| **1** | Ask probing questions to determine the member is calling about an automated outbound call. | |
| **2** | Access the **Communication History** screen. | |
| **3** | Determine if the client opted in to Messaging Platform Alerts [(110103)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d3dcf7c9-3cc9-4864-b6c1-165416474fa1).  **Note:** All clients opted in by default. | |
| **If the Change Contact Info button is...** | **Then...** |
| Activated | The client is opted-in to Messaging Platform.   1. Click the **Change Contact Info** button to access the member’s preferences. 2. Determine type of message received (phone, email or text), and the phone number, email address, or text messaging address in question. 3. Review the Messaging Platform Preferences for the member. 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)   **Additional Resources:**   * [Do Not Contact (Member associated with Messaging Platform Client) (023458)](#_Available_Task_Types) * [Not Receiving Alerts (Member associated with Messaging Platform Client) (023458)](#_Various_Work_Instructions_3) * [Misdirected Calls/Messages (Member Asking to be Added to the Do Not Call List) (023458)](#_Misdirected_Calls_1) |
| Disabled and there is a message stating, “Client is opted out of messaging,” **BUT** the member is receiving alerts | Ensure all other concerns are resolved for the member first, then:  I am going to reach out to our <department name> for assistance with your issue; it may take me a few minutes to reach them. Would you prefer to hold until I reach them, or would you prefer that I check back with you every few minutes?  **CCR:** Warm Transfer to the Senior Team ([When to Transfer Calls to the Senior Team (016311)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9eef064d-c7d7-42f7-9026-1497496b4d51) or [MED D - When to Transfer Calls to the Senior Team (018060)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d3ca13af-f894-45b7-b16a-f2cb777adf77) and provide the member’s ID number.  **Note:** If the Senior Team is not available or has a long hold time (5 or more minutes); contact a Supervisor.  **Result:** Senior Team sends a message to both the IVR team and the Messaging Platform administrator to resolve the issue.  Do not allow the caller to hold more than five (5) minutes without checking in with them even if they have given you approval to hold until a resolution is determined. |

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| Identifying Outbound Calls from Our Home Delivery/Mail Order Pharmacy |

The majority of automated outbound calls will not display in PeopleSafe on the **View Activity** screen.

A member may call Customer Care concerned about a message they received, questioning its authenticity from us. Perform the following steps if this should occur:

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| **Step** | **Action** | |
| **1** | Ask the member for the number that displayed on their caller ID. | |
| **If the member…** | **Then…** |
| Has the number from the caller ID | Proceed to step 3. |
| Does not have the number | Proceed to step 2. |
| **2** | Access PeopleSafe and review the **View Activity** Screen. | |
| **If outbound call information…** | **Then…** |
| Displays | Assure the member that we did make the call to them. |
| Does NOT display | Proceed to step 3. |
| **3** | Review the [Outbound Phone Numbers Displaying on Caller ID (042944)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f9fd8f60-2089-4362-824c-7b410d12744a) document to search for the caller ID number, which identifies the department who called the member.  **Note:** Automated outbound mail adherence calls from our Mail Order Pharmacy provides an 8-digit reference number, as well as ask for the member’s date of birth to confirm they have the correct recipient. | |
| **If the number is…** | **Then…** |
| Located | Assure the member that we did make the call to them. |
| Not located and the member is concerned that the call was fraudulent | Warm Transfer to the Senior Team ([When to Transfer Calls to the Senior Team (016311)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9eef064d-c7d7-42f7-9026-1497496b4d51) or [MED D - When to Transfer Calls to the Senior Team (018060)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d3ca13af-f894-45b7-b16a-f2cb777adf77) or Supervisor for further research. |
| **4** | 1. Open View Opportunities to verify a call came from CVS Health. 2. Open the View Opportunities drop down for the Member or dependent in question.      1. Select **View History** to display attempts to reach the member via OBC, fax, email, etcetera.      1. Note the Channel, Participant, Relationship, Date presented and Disposition.  * If comments are available, they may be viewed by clicking the + sign to the right of the channel.   **Example:** An ADT Core Off Therapy outbound IVR call was attempted 3 times on 9/6/2023. | |

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| Do Not Contact (Member Associated with Messaging Platform Client) |

If the member wishes not to be contacted, complete the following steps once the caller is authenticated and it is determined that they are our member associated with a Messaging Platform Client.

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| **Step** | **Action** |
| **1** | Follow Steps 1-2 in section titled [Automated Calling Issues (023458)](#_Caremark_Participants). |
| **2** | Educate the member on self-service options via the web portal. |
| **3** | Update all Messaging Preference types to “Do Not Notify.”  Refer to [Obtaining an Email Address and Managing Messaging Platform Alerts and refer to section Setting Up and Removing Messaging Preferences (MP) (027674)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=918203d3-2d76-4044-b2d9-0ced0504d471). |

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| Not Receiving Alerts (Member associated with Messaging Platform Client) |

**Note:** Members on the Do Not Call list will not receive Messaging Platform alerts via a phone call.

If member indicates they setup their Messaging Platform preferences however, they have not received any messages or alerts, perform the following steps:

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| **Step** | **Action** | |
| **1** | Follow Steps 1-2 in section titled | |
| **2** | Verify contact information and that preferences are correct. [Calling Issues Messaging Platform or Automated Outbound Calls and Do Not Call (023458)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c404f368-6d11-4dca-8bc6-40c793120335) | |
| **If the contact information and...** | **Then...** |
| Preferences are correct | Warm Transfer to the Senior Team ([When to Transfer Calls to the Senior Team (016311)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9eef064d-c7d7-42f7-9026-1497496b4d51) or [MED D - When to Transfer Calls to the Senior Team (018060)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d3ca13af-f894-45b7-b16a-f2cb777adf77) and request to have a IT ticket created. |
| Or preferences are not correct | Update the information on the **Contact Info** screen.  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). |
| **3** | Educate the member on self-service options via the web portal. | |

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| Misdirected Calls/Messages (Member Asking to be added to the Do Not Call List) |

If the caller is receiving misdirected calls from us and/or does not want to be called, refer to [Do Not Call (DNC) RM Task Request (009294).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=33bdcd98-90e2-4049-a3fc-9aea495258a6)

 This is **not** the procedure for if the member wants to opt out of Messaging Platform alerts, refer to [Do Not Contact (Member associated with Messaging Platform Client)](#_Available_Task_Types) (023458).

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| Turnaround Time |

Up to 10 business days

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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)

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

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

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