# **Inbound or Outbound Call Quality Recording Disclaimer**

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**Description**: Process for handling inbound and outbound calls when the caller has heard the disclaimer regarding recorded calls, and they object to being recorded and the process of when the caller is recording our conversation with them.

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| **Inbound Calls (Caller Objects to Being Recorded)** |

Caller is automatically advised that the call is being recorded prior to speaking with a CCR, then the caller advises they do not want to be recorded:

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| **Step** | **Action** | |
| **1** | Icon - Conversation For this call not to be recorded, I am going to reach out to my supervisor 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?  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. | |
|  | **If caller…** | **Then…** |
|  | Does not want to wait for a supervisor and agrees to the recorded call | Continue with the call. |
| Wants to continue holding and objects to being recorded | Continue to the next step. |
| **2** | 1. Warm transfer the call to a **Supervisor.** (Do not transfer to the Senior Resolution Team).   **MED D Only:** WFH supervisors may have recorded lines. If the member/caller objects to being recorded, contact your supervisor for an alternate supervisor where the call can be transferred.   * Advise the Supervisor that the caller does not want to be recorded and they will direct you to call an office line, Teams number or other line that is not recorded.   + If a supervisor is not available, create an email to a Supervisor on Duty then include the below information:   + **Subject Line:** \*SecureMail\* Non-Recorded Callback Request   + Member ID:   + Member Name:   + Phone Number:     - Add Comments indicating reason for denying for being recorded.   Advise the member they should expect a callback within the following day. | |

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| **Inbound Calls (Caller Advises They are Recording the Call)** |

Complete these steps:

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| **Step** | **Action** | |
| **1** | Caller connects to CCR and advises the phone call is being recorded. Advise the caller that the call may not continue if the caller is recording the conversation.  **Icon - Important Information** This does not apply to other call centers or third-party vendors.  **Examples of parties who may record:** Third party vendors such as State Board of Pharmacy, Benefits Office or Broker, Prescriber, Benefit Verification Specialists, Retail Pharmacy staff, VA (Veterans Administration), Medicaid, Department of Defense (DOD) or other state agencies or VA pharmacies, Hospice or Nursing Home. | |
| **If caller...** | **Then…** |
| Agrees to stop recording the call | Proceed with the call. |
| Refuses to stop recording the call | Warm transfer the call to the Senior Team. Advise the Senior Team that the member is recording the call.  **Result:** Senior Team handles the call as a normal escalation. |
| **2** | Document this interaction in the system being used. | |

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| **Outbound Calls (Representative Must Verbally Advise of Recording)** |

Outbound calls can be made to membersduring the following time periods **only**. (Respecting the local time zone of the members to ensure compliance with time zone-specific regulations).

**Note:** This timeframe applies only to initial outbound calls and does not include callbacks resulting from dropped calls, which may occur outside these hours as needed.

**Monday to Friday:** Between 9:00 am – 8:00 pm

**Saturday:** Between 9:00 am – 8:00 pm

**Sundays: Only** as directed by leadership, between 9:00 am – 8:00 pm

**Note:** eCare leadership’s direction is to make outbound calls on Sundays during the approved hours.

** Do Not** call on holidays.

When making **an** outbound call, it is **important** to **verbally advise** the party being contacted (call recipient) that the call is being recorded:

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| **Step** | **Action** | |
| **1** | Hello, this is <your name> calling from <PBM Name>. May I speak with <members name>? | |
| **If call recipient…** | **Then…** |
| Answers | Icon - Conversation I am following up on your inquiry. I need to let you know that this call is being recorded or monitored for quality purposes.  **CCR:** Proceed to the next step. |
| Does not answer | * + If neither the member nor the person who made the request on behalf of the member is available, you may **not** share any information.   + PHI cannot be left on voice mail. Leave a number for the pharmacy, prescriber, or member to call back as appropriate.   Identify:   * Your name * PBM name * PBM phone number * Days and hours of operation including the time zone for the member to contact.     **Example:** My name is Billi Care at CVS Caremark. Our callback number is 1-214-555-1212. We are open Monday – Friday 8 am to 5 pm Central Time  **Note:** Leave only one (1) message for a call back. |
| **2** | Pause to allow call recipient time to object to recording the call. | |
| **If call recipient…** | **Then…** |
| Does not object | 1. Fully authenticate the call before proceeding as outlined in the [Universal Care - Caller Authentication (004568)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=bcb8da72-5501-4631-b9fd-fe675bc4a1fd) and [HIPAA (Health Insurance Portability and Accountability Act) Grid - CVS (028920)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce) section titled: Outbound Calls - refer to Member or Calling on behalf of another member. 2. Continue with the call as usual. |
| Objects to being recorded | Continue to the next step. |
| **3** | Advise the call recipient that call recording is an automated process and the call needs to be transferred.  Icon - Conversation For this call not to be recorded, I am going to reach out to my supervisor 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?  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. | |
| **4** | Confirm with the call recipient whether they would like to continue the recorded call, or if they would like to be transferred. | |
| **If they…** | **Then…** |
| Agree to continue with the recorded call | 1. Fully authenticate the call before proceeding as outlined in the [Universal Care - Caller Authentication (004568)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bcb8da72-5501-4631-b9fd-fe675bc4a1fd) and [HIPAA (Health Insurance Portability and Accountability Act) Grid - CVS (028920)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce) section titled: Outbound Calls - refer to Member or Calling on behalf of another member. 2. Continue with the call as usual. |
| Object to being recorded | 1. Warm transfer the call to a supervisor.   Do not transfer to the Senior Resolution Team.  **MED D Only:** Work from Home (WFH) supervisors may have recorded lines. If the member/caller objects to being recorded, contact your supervisor for an alternate supervisor where the call can be transferred.   * Advise the Supervisor that the caller does not want to be recorded and they will direct you to call an office line, Teams number or other line that is not recorded. * If a supervisor is not available, email the following information to a supervisor that is on duty.   + Subject Line: \*Securemail\* Non-Recorded Callback Request   + Member ID:   + Member Name:   + Phone Number:   + Add Comments indicating reason that the caller does not want to be recorded**.**   Advise the member that you have requested a callback for them, and they should get a callback within the next calendar day. |

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| **Frequently Asked Questions and Answers** |

Use as needed:

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| **Question/Statement** | **Answer** |
| If a member hands the phone off to another individual mid-conversation, should the call quality disclaimer be given at that time, since they were not the original caller and most likely did not hear the automated disclaimer? | No, this information does not need to be repeated as per the Privacy Team. |

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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)

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

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