# **Compass and PeopleSafe - Downtime Procedures**

[Work from Home (WFH) Representative Downtime Procedure](#_Toc205793465)

[PeopleSafe and Compass CRM (Customer Relationship Manager) Outages](#_Toc205793466)

[Handwritten Refill Form](#_Toc205793467)

[System Outages](#_Toc205793468)

[MED D – Grievances Procedures](#_Toc205793469)

[Related Documents](#_Toc205793470)

**Description:** Steps to take when our software applications, Internet, Web Portal, or computers experience outages to minimize member inconvenience. A designated-on duty Supervisor and a backup Supervisor will be available and responsible for oversight at each site.

|  |
| --- |
| **Work from Home (WFH) Representative Downtime Procedure** |

**Reminders:**

 Emails with PHI/PII (Protected Health Information/Personally Identifiable Information) must have **\*SecureMail\*** placed in the Subject line.

* Inform a designated leader immediately when you are unable to perform your assigned job duties.

**Note:** Your Supervisor or Manager determines the course of action to be followed.

* In the event of technical downtime due to lost power, system outage, line problems with DSL/cable, or phone issues, you may be expected to report to the site to perform your normal duties.

**Note:** If you do not have a designated site to report to in the event of inclement hazardous weather, or any other safety related concern preventing travel to an on-site destination, your immediate Supervisor, on-site Supervisor, Manager, or leader will determine the next course of action (myTime /Unpaid or System Flex Option).



* It is imperative to have the company notifications updated to receive emails, text messages, or phone calls with urgent messages. Refer to [Customer Care Work from Home (WFH) PBM Guidelines (080550)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6ed385e8-dad0-4330-8610-f89a369e9cd3).
* If your system is not working for **more than two hours**, you are required to report on-site unless you are given different instructions by your designated leader. Leaders may require you to report on-site sooner.

Perform the steps below when experiencing a computer malfunction or systems issue during a live call.

|  |  |
| --- | --- |
| **Step** | **Action** |
| **1** | **Note:** Remain calm and focus on the caller on the line. Leave the electronic notepad open and document the caller’s authentication information and other pertinent call information and obtain a callback number.   * Close any excessive web pages (Chrome/Internet Explorer/Edge) by selecting the top right corner “**X**” or “**Ctrl-Alt-Tab**.” * Log off all systems with the exception apps or pages that would cause the live call to disconnect. Do not close applications such as Cisco AnyConnect -VPN/Symantec VIP/Five9 or another Phone App. * Refer to [PeopleSafe Phone System Log In with CTI (IVR) Call Handling, Updates and Troubleshooting (075981)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=59b2b856-ee29-4eeb-a801-83911c01bb47). |
| **2** | Attempt to log back into your systems, reopen the minimal amount webpages/browsers.   * If successful, continue with the call and send a Teams chat notification to your supervisor advising of the situation. * If unsuccessful, do **not** disconnect the caller. * Warm transfer to another representative based on the Customer Care phone number located in the Client Information Form (CIF). * If no phone number is listed, warm transfer the caller to the respective Senior Team. Refer to [PeopleSafe - When to Transfer Calls to the Senior Team (016311)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9eef064d-c7d7-42f7-9026-1497496b4d51).Notify your supervisor of your situation and continue to the next step. |
| **3** | 1. Restart your computer by clicking on the Microsoft icon (lower left side of screen). 2. Clear your Cache. Refer to [Clearing Your Cache (008655)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cd7acfcb-ad36-4da3-b973-faf08afb7dea). 3. Select the **Power** button (directly above your Microsoft icon) and select **Restart**.Once rebooted,attempt to reconnect.  * If continue to experience problems logging into your system and the outage is **not** impacting many colleagues in your business area: Change phone state to Not Ready by selecting **TEC – System** or **Technical Issues** in Five9. Notify your supervisor andcontact the IT Service Center (ITSC) for assistance at 1-855-280-4872.   **Result:** The Supervisor or Manager provides the best course of action for you to follow.  **Note:** If reporting on site, check in with your supervisor or designated leader to complete any pending paperwork or process that might be needed. Open an IT ticket if the issue is Hardware/Software related, and request to be assigned to an on-site workstation.  **Icon - Important Information** Do not contact the Front desk of any local site.   1. **Global outages:** Refer to [PeopleSafe and Compass Outages](#_PeopleSafe_Outages) and [System Outages](#_Systems_Outages) for appropriate downtime procedures. Obtain an Estimated Time of Arrival (ETA) and “Ticket #” for resolution. Provide this information to your supervisor or designated leader. |

[Top of the Document](#_top)

|  |
| --- |
| **PeopleSafe and Compass CRM (Customer Relationship Manager) Outages** |

 When Compass is down, use the Five9 desktop application strictly during downtime procedures to continue servicing members.

Perform the steps below:

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | **Action** | | |
| **1** | Thank you for calling my name is <name>, who am I speaking with?  Provide a clear response of "Yes, I can help you…"   * This means: You can assist the caller directly, OR * You can assist the caller even if we are transferring elsewhere for assistance.   (**Examples:** Not an all-inclusive list: Another Care line of business, Specialty, Dedicated Team, Clinical, etcetera.)  Refer to:   * [Universal Care - Caller Authentication (004568)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bcb8da72-5501-4631-b9fd-fe675bc4a1fd) * [Universal Care - Consultative Call Flow (CCF) Process (095822)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c954b131-7884-494c-b4bb-dfc12fdc846f)   Continue to step 2. | | |
| **2** | Determine the reason for the call. | | |
| **If…** | **Then…** | |
| **Requesting to place a refill** | Use the [Handwritten Refill form](#_Hand_Written_Refill_1) below to document the member’s request.  **Note:** Complete and then email the form to your supervisor or the designated Supervisor on Duty (or back up supervisor). Each site is responsible for oversight of the process.  The information must be completed and written clearly to avoid delays.  **Note:** If the member is calling to start new prescriptions via mail service, refer to [PeopleSafe - Obtaining a New Prescription (Rx) for the Member (058827)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a1443f4f-499e-442c-be11-fd2b207bf86c) OR [Compass - Obtaining a New Prescription (Rx) for the Member (New Rx Request) (054208)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a7684ce9-c2bc-4cbc-ab37-c1ffb7789706). | |
| **MED D Premium Payment** | **If SilverScript (SSI):**  If you would like to make your premium payment now, I can assist you with that payment.  Refer to [Aetna MED D - SilverScript Premium Billing Online Payment Portal (101305)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=14948382-cd5e-4f18-a5bc-0e843a6c974e) for step-by-step instructions.  **If Blue MedicareRx (NEJE):**  I apologize for the inconvenience, and we would appreciate it if you would call us back later as our systems are currently down. We should be able to access your account in <provide time when systems are scheduled to be finished updating>. | |
| **All Other Inquiries** | **Respond to the Caller:** | |
| **Communicate** | We are currently updating our systems, and I am unable access the account at this time. We should be able to access our systems in <1, 2, or 3 hours, alternating with each caller>.    **Note:** If submitting a manual refill form, provide the estimated turnaround time to the member and review it with them to prevent Class 1 Errors. |
| **Answer** | Additional questions if known, without the use of the system.  Utilize all available resources such as:   * Teams Chat * theSource * CIF (if not down) * Senior Resolution Line   Educate on alternative options available that the member can use to resolve the request. This may prevent a callback while positively impacting the member experience, which can be understandably frustrated, annoyed, losing patience, etcetera. |
| **Apologize** | For the inconvenience:  Refer to CIF for any grievance process for FYI (For your information) emails to be communicated regarding member experiences, retail benefits, overrides, or Submission Clarification Codes (SCC) that apply without PeopleSafe if the issue is concerning a CVS Retail Point of Sale pharmacy rejection or claims processing that need verification. |
| **Thank the caller** | Thank you for calling. It has been a pleasure speaking with you, have a great day!  **Note:** Regardless of the outage, there could be alternative solutions and tools available allowing you to continue the call. |

[Top of the Document](#_top)

|  |
| --- |
| **Handwritten Refill Form** |

Copy the below form and paste into the Outlook email.

 Email to Supervisor and input **\*SecureMail\*** on Subject line (Handwritten Refill Form <Date>.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Handwritten Refill Form** | | | | | | | | | |
| **\*\*\*Contains PHI – All Fields Must be Completed\*\*\*\*** | | | | | | | | | |
| **Date** |  |  | | | | | | | |
| **Time** |  |
| **CCR Name** |  | | | | | | | | |
| **Member Information** | | | | | | | | | |
| **ID** |  | | | | |  | | | |
| **Full Name** |  | **DOB** |  | | |
| **Shipping Address** | | | | | | | | | |
| **Address** |  | | | | | | | | |
| **City** |  | **State** |  | | | **Zip Code** | |  | |
| **Telephone #** |  | **Shipping Method:** | **Best Method**  **(No Charge)** | |  | **2 day**  **($17)** |  | **Urgent Next Day ($23)** |  |
| **Prescription Information** | | | | | | | | | |
| **Rx Number** | **Member Name** | **Date of Birth** | **Drug Name** | | | **Strength** | | **Quantity** | |
|  |  |  |  | | |  | |  | |
|  |  |  |  | | |  | |  | |
|  |  |  |  | | |  | |  | |
|  |  |  |  | | |  | |  | |
|  |  |  |  | | |  | |  | |
| **Payment (Default Method of Payment on File?**  **Yes / No** | | **If No** | **Routing Number** |  | | **Account Number** | |  | |
|  | |
| **The member must call back or use the Member Web Portal to “ADD” a credit card.** | | | | | | | | | |

[Top of the Document](#_top)

|  |
| --- |
| **System Outages** |

**Reminders:**

* Inform a designated leader immediately and follow the downtime process.
* If necessary, the Supervisor or Manager determines the course of action to be followed by the colleague.
* In the event of technical downtime due to lost power, system outage, line problems with DSL/cable, or phone issues, you may be expected to report to the site to perform your normal duties.

**Internet Connection**

In the event your internet connection is not working, perform the following:

1. Power off the computer.
2. Unplug the internet modem for 30 seconds then plug it back then allow the lights to activate green or blue.
3. Follow the connection cables to ensure that they are securely plugged.
4. Ensure clip is not damaged cord/cable not damaged or twisted.
5. Restart your computer and attempt to reconnect.

* If there is no internet connection on the assigned work computer, check a personal computer (if owned) for internet connectivity.
  + If your personal computer has an internet connection, check the physical connections on the assigned work computer. If it continues to have problems, call the IT Service Center at 1-855-280-4872 for assistance.
    - If there is no internet connectivity on either computer, contact your internet provider. Determine if there is an outage in your area and if there is an estimated time of resolution. Contact your supervisor or a designated leader to advise of the situation and for further instruction.

**Note:** You may be expected to come into the facility and be assigned a workspace. If you do not have a designated reporting site, your designated leader determines the course of action. (myTime/Unpaid or System Flex Option).

Icon - Important Information If your system is not working for more than two hours, you are required to report onsite unless you are given different instructions by your designated leader. Refer to [MED D - System Downtime Index (011258)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c9423a17-ee85-4a3a-baee-15b8f59e823b)for up-to-date system outages.



* If the Downtime Procedures are impacting the ability to transfer the caller to a different team, department, plan benefit office, etcetera, provide the caller with the direct number for a later callback to that area, as allowed.
* Do **not** disclose Internal Use Only phone numbers to the beneficiary.
* Watch for important email communications regarding system outages.
* In some instances, we may experience an issue when accessing Web Portal via Compass or PeopleSafe; however, members may not be impacted when logging on externally.

Perform the following steps in the event of a **Web Portal** outage:

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | **Action** | | |
| **1** | Thank you for calling my name is <name>, who am I speaking with?  Provide a clear response of "Yes, I can help you…"   * This means: You can assist the caller directly, OR * You can assist the caller even if we are transferring elsewhere for assistance.   (**Examples:** Not an all-inclusive list: Another Care line of business, Specialty, Dedicated Team, Clinical, etcetera.)  Refer to:   * [Universal Care - Caller Authentication (004568)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bcb8da72-5501-4631-b9fd-fe675bc4a1fd) * [Universal Care - Consultative Call Flow (CCF) Process (095822)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c954b131-7884-494c-b4bb-dfc12fdc846f)     Continue to step 2. | | |
| **2** | Determine the caller’s need: | | |
| **If...** | **Then...** | |
| **Order a Refill/New Prescription** | Assist the caller by placing the refill order or new prescription request in Compass or PeopleSafe.  Icon - Important If there is a system outage, complete the [Handwritten Refill Form](#_Hand_Written_Refill_1). | |
| **A Web Portal Inquiry** | **Respond to the Caller:** |  |
| **Communicate** | Icon - Conversation We are currently updating our systems, and I am unable to access your Web Portal account at this time. We should be able to access the Web Portal in <1, 2, or 3 hours>. (Alternating with each caller.) |
| **Assist** | Many website inquiries and questions can be answered using Compass or PeopleSafe.  **Example:** Order status, check drug cost (Test Claim) or plan summary without accessing the Web Portal.   * If the member is calling regarding an issue with the web portal and you are unable to assist them using the resources available in Compass, PeopleSafe or theSource, submit a web error detailing the issue for further research. Refer to [Caremark.com - Web Error Reporting and Troubleshooting Guide (066155)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=8f4576f4-b866-4b64-beb0-c1089b3c32e8). |
| **Apologize** | Icon - Conversation I apologize for the inconvenience. I understand it is frustrating. We are working on a solution. |
| **Thank the caller** | Icon - Conversation Thank you for calling. It has been a pleasure speaking with you, have a great day! |
| **All other transactions** | Icon - Conversation We are currently updating our systems, and I cannot access your account at this time. We should be able to access our systems in <1, 2, or 3 hours>. (Alternating with each caller.) | |

[Top of the Document](#_top)

|  |
| --- |
| **MED D – Grievances Procedures** |

**Note:** This process should **not** be used when the Customer Care Representative (CCR) does not have personal access. **Example:** Password issues.

In the event of a planned or unplanned system outage (Compass/PeopleSafe/MHK), capture Grievances using the following links:

 **Only** use when instructed by Supervisor/Manager.

* SSI PDP, SSI EGWP, Aetna EGWP Grievances - <https://cvs.az1.qualtrics.com/jfe/form/SV_eFFhaTdukKcnSjX>
* Health Plans & NEJE Grievances - <https://cvs.az1.qualtrics.com/SE/?SID=SV_0cxDZnXolz8btEV>

**Grievances Only:**

When **all** systems are down and the internet is **not** working (**Example:** Total loss of connectivity), complete the following:

1.  Reach out to your Supervisor/Manager to obtain directions on how to handle calls.

**Note:** In the event that grievances need to be processed, the Supervisor/Manager will provide a paper copy of [MED D - PeopleSafe (formerly MHK Fusion) Downtime Form (010146)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d4b4b99a-251e-4b3a-9b73-b7cbac971691). For Health Plans & NEJE Grievances: [Compass MED D – Compass (Health Plans (HP) and NEJE) Downtime Form (073676)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=96a0437f-6ded-4f91-8617-aebae1914fd6).

1.  Once all the forms have been completed, attach the completed downtime form to an email. Add the word \*SecureMail\* In the “To” line and send to: SSI PDP, SSI EGWP, Aetna EGWP Grievances: [MedicareOralGrievanceUnitMailbox@aetna.com](mailto:MedicareOralGrievanceUnitMailbox@aetna.com) Health Plans & NEJE Grievances: [DelegatedGrievance@CVSHealth.com](mailto:DelegatedGrievance@CVSHealth.com).

**Reminders:**

* When Compass/PeopleSafe is back up, clear your browser’s cache prior to restarting. Refer to [Clearing Your Cache (008655)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cd7acfcb-ad36-4da3-b973-faf08afb7dea).
* If a Grievance is filed in Qualtrics after the system is up and running, the Grievance is returned to the CCR’s Supervisor for the CCR to correctly enter the Grievance in PeopleSafe/Compass.

[Top of the Document](#_top)

|  |
| --- |
| **Related Documents** |

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

[MED D - System Downtime Index (011258)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c9423a17-ee85-4a3a-baee-15b8f59e823b)

[MED D - PeopleSafe (formerly MHK Fusion) Downtime Form (010146)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d4b4b99a-251e-4b3a-9b73-b7cbac971691)

**Downtime Process** section within [Aetna MED D - SilverScript Premium Billing Credit Card Single-Sign-On (SSO) Processes (098901)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=56e63826-3e28-4427-b5e9-1dc4a5140209)

**Downtime Process** section within [MED D - Blue MedicareRx (NEJE) Premium Billing Credit Card Single-Sign-On (SSO) Processes (017576)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=53335578-e3bd-4ecc-a6de-0fe9c1e3d27e)

**Downtime Process** section within [Aetna MED D - SilverScript Premium Billing E-Check/EFT Single-Sign-On (SSO) Processes (005923)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6c4730ff-7093-47c9-a1b5-87593d686394)

**Downtime Process** section within [MED D - Blue MedicareRx (NEJE) Premium Billing E-Check/EFT Single-Sign-On (SSO) Processes (028699)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5d43393c-71b0-4ed1-a3e3-a6247be1e5de)

**Parent Documents:**

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

[Medicare Part D Customer Care Call Center Requirements-CVS Caremark Part D Services, L.L.C. (CALL-0048)](https://policy.corp.cvscaremark.com/pnp/faces/SecureDocRenderer?documentId=CALL-0048&uid=pnpdev1)

[Top of the Document](#_top)

Not to Be Reproduced or Disclosed to Others without Prior Written Approval

**ELECTRONIC DATA = OFFICIAL VERSION / PAPER COPY = INFORMATIONAL ONLY**