# **Compass and PeopleSafe - Transferring Calls to Dedicated Client Teams**

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**Description:** Process for handling calls from members who receive benefits through a client with a dedicated team.

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| **Pop Up – No Access to This Beneficiary** |

**Dedicated Client:** This message indicates the user is unable to access the account.

**Compass**

A screenshot of a message

AI-generated content may be incorrect.

**PeopleSafe**

**A screenshot of a computer

AI-generated content may be incorrect.**

 If you are not trained to handle Client Pharmacy accounts, advise the caller: In order to obtain help with their account they would need to please call the number on the back of their Member ID card.

**Note:** If you believe the member has other benefits, try searching again or selecting a different account.

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| **Exceptions and Reminders** |

** Always refer to the plan CIF for instruction.**

* If caller is a prescriber calling for a “prior authorization, to initiate a prescription, or due to a Delayed Prescriber Hold,” warm transfer directly to that specific department instead of transferring to the dedicated team.

If the member is calling solely regarding the status of their orders or to place an order in the Specialty Pharmacy **and** the CIF states we handle these requests, warm transfer the call to Specialty per the number listed in the CIF.

 Let me get you over to our Specialty pharmacy, who will direct you to your correct therapy for further assistance.

 If the CIF does not state that the client is dedicated or that basic call handling can be performed, handle the call as normal and maintain call ownership.

 All Medicaid and Exchange Clients can be handled by Commercial agents unless the CIF advises otherwise.

 If you are not trained for the specific lines of business listed below, warm transfer to the phone number listed in the Client Alerts/High Priority Comments or CIF.

* Aetna Commercial
* Aetna MED D
* Aetna Medicaid
* EGWP
* Medicare D

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| **Dedicated Team Process and Client List** |

High Importance **Refer** **to the Client Alerts/High Priority Comments or CIF to obtain the transfer phone number for the Dedicated Team.**

High Importance If there is an **Escalation**, then warm transfer and properly introduce the caller to their dedicated team. (Do not transfer to the Senior Resolution Team). Some clients have their own Senior Resolution Team.

High Importance A warm transfer is required for all Dedicated Teams listed.

**Note:** If you access the members’ account and receive a message that you do not have this access, warm transfer the call to the associated dedicated team. If the client or team is not listed, refer the member to call the number on the back of their member ID card.

* Dedicated indicates only certain colleagues trained for this client should handle the call.

Perform the steps below:

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| **Step** | **Action** | |
| **1** | 1. Determine the associated client with the member. 2. Review the Client Alerts/High Priority Comments and the CIF. | |
| **2** | Review the Dedicated Client List below to determine if the client has specialized instructions as to whom should answer calls for their members: | |
| **Client** | **Lines of Business** |
| Aetna Commercial | Commercial |
| Aetna Med D | Medicare D |
| BCBS MA | * Commercial * Medicare D |
| Commonwealth Care Alliance (CCA) | * Medicare D * Medicaid |
| CVS/Caremark Employees | Commercial |
| FEP Commercial | Commercial |
| GEHA Commercial | Commercial |
| NEJE | Medicare D |
| NRLCA | * Commercial * EGWP |
| State of Georgia | Commercial |
| **Caller is supported by a “Dedicated Team” on the Dedicated Client List** | **Then...** |
| **Yes** | 1. Transfer allissues to the Specialized Dedicated team using the phone number in the Client Alerts/High Priority Comments or CIF. 2. Validate the phone number that the member is calling from so that you can call them back if the line disconnects.   **Suggested verbiage for transfer:**  Icon - Conversation We have a specialized team that can assist with <issue>. May I give you the direct toll-free number for your future use? Thank you! I will need to place you on a brief hold so I can transfer you to the correct team and explain the situation. May I check back with you in about 5 minutes, or would you prefer I check back sooner?  Do not allow the caller to hold more than five minutes without checking in with them even if they have given you approval to hold until a resolution is determined.  **Note:** Once the line has been answered, provide:   * Your first name and initial of last name. * Department you are calling from your ID. * Member ID/Identify who is calling and relationship. * Pharmacy name, NPI number if applicable. * Acknowledge if fully authenticated or not. * Brief explanation of the reason for the call. * Setting up the receiving colleague with information can improve a member’s experience by not having to repeat their reason for the call or be “over authenticated.” |
| **No** | Refer to the [Process for Basic Call Handling for Dedicated Teams](#_Process_for_Basic) section below. |

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| **Process for Basic Call Handling for Dedicated Teams** |

High Importance **If the client is not listed on the table above or unless the CIF states otherwise, basic call handling can be performed for Dedicated Teams.**

High Importance If there is an Escalation, then warm transfer and properly introduce the caller to their dedicated team and not to the Senior Resolution Team. Some clients have their own Senior Resolution Team.

**Note:** If you access the members’ account and receive a message that you do not have this access, warm transfer the call to the associated dedicated team. If the client or team is not listed, refer the member to call the number on the back of their member ID card.

Perform the steps below:

|  |  |  |
| --- | --- | --- |
| **Step** | **Action** | |
| **1** | Determine the associated client with the member.   * Review the Client Alerts/High Priority Comments and the CIF. | |
| **2** | Determine if the member is on the Dedicated Team Client List, refer to [DedicatedTeam Processand Client List](#_Dedicated_Team_Process) section of the document.   * If the member is not listed on the Dedicated Team Client list or unless the CIF states otherwise, proceed to next step | |
| **3** | Determine the type of request:  Complete the following as needed for specialized clients, who we can assist with simple call types and for web navigational issues: | |
| **If request is for...** | **Then...** |
| * Refills * Order Status * Payment Maintenance * Fulfillment Automation * Member Demographic updates * CMP Alert Update/Changes * Pharmacy Locator * Rx Transfer Request (MOR to POS) | Assist the caller with their questions according to standard procedures. |
| Web (Navigational Support) | Assist the caller using standard Web Navigational procedures.  **Notes:** Review the CIF, some may have specific instructions as well as the extra authentication process for handling web access.   * If you require additional assistance when handling a web request, refer to the following: * **Compass users:** Refer to [Caremark.com – Web Error Reporting and Troubleshooting Guide (066155)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=8f4576f4-b866-4b64-beb0-c1089b3c32e8). * **PeopleSafe users:** Refer to [Caremark.com – Web Error Reporting and Troubleshooting Guide (066155](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=8f4576f4-b866-4b64-beb0-c1089b3c32e8)) * If you have questions after reviewing the index, refer to your Senior Team work instructions: * **Compass users:** [Compass - When to Transfer Calls to the Senior Team (057524)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7653e7c2-1a97-42a0-8a81-6267c72e1ca9) or [Compass MED D - When to Transfer Calls to the Senior Team (062944)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7). * **PeopleSafe users:** [PeopleSafe – 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) |
| If the call becomes Plan Design related or All Other Issues not listed. | Transfer to the Dedicated Team.  High ImportanceProvide the phone number of the department where you will be transferring the caller, providing it does not indicate an internal number, if applicable. |

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| **Related Documents** |

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

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

[Paper Claim - Government Agency (042387)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=fa1ac6a1-5789-401d-b7a2-10573f4e87ef)

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