# PeopleSafe - Phone System Log In with CTI (IVR) Call Handling, Updates and Troubleshooting

[PeopleSafe Phone System Log In](#_Toc191568158)

[CTI (IVR) Screen Pop Up](#_Toc191568159)

[CTI Member IVR Options - Caller Intent](#_Toc191568160)

[FastReFill IVR](#_Toc191568161)

[Phone Number Updates in the IVR](#_Toc191568162)

[Troubleshooting CTI (IVR) Errors and Issues](#_Toc191568163)

[Reporting IVR Issues](#_Toc191568164)

[Related Documents](#_Toc191568165)

**Description:** Provides instructions for accessing (logging into) and troubleshooting the CTI Phone System and its IVR features.

|  |
| --- |
| PeopleSafe Phone System Log In |

Perform the steps below:

|  |  |
| --- | --- |
| **Step** | **Action** |
| **1** | Start the log in process in Five9 first, then return to this document to log into PeopleSafe, and then return to Five9 to complete the log in process and make yourself Ready.   * **Internal:** Refer to [PeopleSafe – Log In and Log Out of the Five9 Soft Phone (052163)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9546ff42-1c20-43e0-8a1f-bd8a5408de5b). * **Vendors:** Refer to [Using Verint (056210)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d9eec58d-f754-497f-b253-ced75bac8770) and [PeopleSafe - Log in Steps for Five9 WebRTC via Citrix and VDI – Vendor (074280)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e82b072b-62cf-4a2d-aa6f-6145ed6da720).   Double click the **PeopleSafe icon** on your desktop to open in Microsoft Edge.  **OR**  Open Microsoft Edge and access Client Services via the following URL:  [Https://www7.caremark.com/clt/Login](https://www7.caremark.com/clt/Login).  **Result:**  The Client Services Login screen displays. |
| **2** | Type in QL or QCP ID in the Login ID field and input your password then select **Log In.**   * If this is the first time accessing the Client Service application, use the temporary password assigned to you. Change your password once you successfully logged in.   **Notes:**   * Updates to passwords are required every 90 days. * Automatic system notifications are sent on day 85 in advance of the password expiring.   Failure to change your password will result in your User ID being revoked requiring you to contact IT Service Center to reset your password. |
| **3** | * Click on the **PeopleSafe** hyperlink to open a new browser.   **Result:** Welcome to PeopleSafe splash screen displays.   * Close the PeopleSafe browser.   **Note:** With each new call a new browser will populate. The browser opened will only be used for that call. At the end of every call the newly opened browser **must** be closed.   After logging into PeopleSafe, do not close the initial Client Services Login Portal window, minimize it when not in use. That is the only PeopleSafe window that should not be closed out for each call. |

[Top of the Document](#_top)

|  |
| --- |
| CTI (IVR) Screen Pop Up |

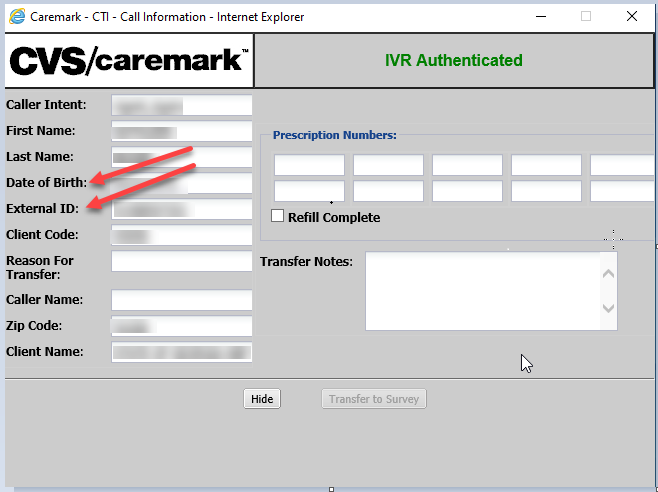
Perform the steps below:

|  |  |  |
| --- | --- | --- |
| **Step** | **Action** | |
| **1** | Determine if CTI/IVR screen pop up displayed when call was received. | |
| **If…** | **Then…** |
| Yes | Continue to the next step. |
| No | Continue to Non-authenticated caller. Refer to [Universal Care - Caller Authentication (004568)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bcb8da72-5501-4631-b9fd-fe675bc4a1fd). |
| **2** | **Result:** System automatically populates a new PeopleSafe tab and loads the member information. The CTI pop up displays the members' information and alerts you if this is an authenticated member via the IVR, or if this is a conference or transferred call from another Care agent which will require confirmation of authentication.  Review the CTI/IVR pop up to ensure all member authentication is displayed.  **Notes:**   * Depending on the reason the member gave for the call to the CTI system, PeopleSafe may open to a page other than the Main Screen. * If the caller was transferred from an outbound call, the CTI pop up screen will identify it with the text “OBIVR” in the “Caller Intent” field. (See next section “CTI Member IVR Options - Caller Intent”). * Click the **Hide** button or minimize the screen pop up as needed. | |
| **If CTI/IVR pop up…** | **Then…** |
| Has completed and states IVR Authenticated. | Proceed to assist as a CTI/IVR Authenticated caller, refer to [Universal Care - Caller Authentication (004568)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bcb8da72-5501-4631-b9fd-fe675bc4a1fd). |
| Did not display or has a Conference/Transfer indicator. | Proceed to assist as a **non**-CTI/IVR Authenticated caller, refer to [Universal Care - Caller Authentication (004568)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bcb8da72-5501-4631-b9fd-fe675bc4a1fd). |

[Top of the Document](#_top)

|  |
| --- |
| CTI Member IVR Options - Caller Intent |

For an IVR Authenticated call, the Caller Intent field displays what the call is about based on the input from the IVR.



**IVR Authenticated Call Information**

 If all 10 Prescription Number fields are complete, ask the caller if they had any additional prescriptions to refill.

The following table assists with determining the meaning of the member’s selections in the IVR. The Caller Intent field values include, but are not limited to:

|  |  |
| --- | --- |
| **What you will see in Caller Intent Field** | **What it means** |
| **Address Change** | Member needs to update address. |
| **Agent** | Member needs to speak with representative. |
| **Balances** | Member had account balance questions. |
| **Claim Problem** | Member has questions with a paper claim. |
| **Credit Card** | Member needs to provide credit card information. |
| **Drug Price** | Member needs the medication price or needs information related to coverage for a medication. |
| **Eligibility** | Member wants eligibility information. |
| **Eligibility Details** | Member wants eligibility information. |
| **Forms** | Member needs forms. |
| **ID Card** | Member wants an ID card. |
| **Member Claims** | Member wants to submit a paper claim. |
| **more** | Member needs information. In this case, the IVR was not able to determine what the member needed based on the words they provided into the IVR. |
| **OBIVR<call type>** | An automated outbound call was made to member and the member is now being routed to Care.  **Example automated outbound calls:** Ship Consent, High Copay, credit card does not have sufficient funds. |
| **Order Status** | Member wants order status information. |
| **Override General** | Member needs an override. |
| **Payment Info** | Member wants to provide payment information. |
| **Pharmacist Contact** | Member wants to speak to pharmacist. |
| **Pharmacy Other** | Member has a general pharmacy benefits question. |
| **Pharmacy Locator** | Member needs to know which pharmacy is covered by plan. |
| **Preauthorization New** | Member is asking for a prior authorization for a prescription. |
| **Predictive Intent Prior Authorization Status** | Member wants prior authorization status. |
| **Predictive Order Status** | Member wants order status information. |
| **Predictive Refill** | Member has placed a refill or wants to place a refill. |
| **Prescription Denied** | Member’s prescription was denied. |
| **Prescription Cancel** | Member wants to cancel a prescription. |
| **Prescription New** | Member is calling regarding a new prescription or may be asking for a renewal of an existing prescription. |
| **Prescription Transfer** | Member needs a prescription transfer. |
| **Prior Authorization Status** | Member wants prior authorization status. |
| **Refill** | Member has placed a refill or wants to place a refill. |
| **Refill Question** | Member has question on a refill. |
| **Return Call** | Member is returning a call made to them or is calling in regarding written communication.  **Example:** Letter or email. |
| **Something Else Again** | Member has called before and needs information. In this case, the IVR was not able to determine what the member needed based on the words they provided into the IVR.  Similar to “more” above. |
| **Vaccine** | Member wants vaccine information. |

[Top of the Document](#_top)

|  |
| --- |
| FastReFill IVR |

Some members have a number printed on their Rx label for placing quick and easy orders. This number connects them with FastRefill through our IVR system.

**Note:** Some clients have opted out of the FastRefill IVR. These impacted members will have the standard IVR phone number for the client printed on the prescription bottles instead of the FastRefill number.

[Top of the Document](#_top)

|  |
| --- |
| Phone Number Updates in the IVR |

The IVR includes an option for members to add their phone number to the IVR database for future reference and identification purposes. When a member calls into the IVR from a phone number that is not in the IVR database, the IVR will state: I see you are calling from <xxx-xxx-xxxx>, would you like to add this phone number to your account? [Pause], Please say either Yes or No.

* If yes, the IVR automatically adds the phone number to the IVR database after full authentication.

**Notes:**

* The phone number is recorded in the IVR database. It is not added to the member’s profile in PeopleSafe. Instead, this update is implemented to improve a member's experience with the IVR.
* The member’s default phone number is not impacted.
* If a member voices concern about this, offer to update their phone number on their account and educate on notification features. Refer to [Messaging Platform Alerts (110103)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d3dcf7c9-3cc9-4864-b6c1-165416474fa1).

**Note:** Only the member themselves or a legally authorized representative (such as a Power of Attorney with paperwork on file) may make account level changes, such as adding/changing a phone number.

[Top of the Document](#_top)

|  |
| --- |
| Troubleshooting CTI (IVR) Errors and Issues |

**Troubleshooting tips:**

**Refer to as needed:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Scenario** | **Action Steps** | | |
| **Error message displays the following:**    **User must be logged on to the phone system prior to logging into PeopleSafe.** | * Click **OK** on the error message and exit the PeopleSafeapplication. * Log into the [Using Verint (056210)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d9eec58d-f754-497f-b253-ced75bac8770) and [PeopleSafe - Log in Steps for Five9 WebRTC via Citrix and VDI – Vendor (074280)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e82b072b-62cf-4a2d-aa6f-6145ed6da720) to the phone then click on the **PeopleSafe** hyperlink. | | |
| **Error message displays the following:**    **An error has been detected, please try again later**    **OR**    **No response from the CTI server, please try again later** | The system automatically routes CCR to PeopleSafe Welcome screen.    Perform the steps below when an error message occurs: | | |
| **Step** | **Action** | |
| **1** | Authenticate the caller. | |
| **2** | When call volume allows, click on the **Tool Bar,** and review the CTI status.  If the problem persists then restart your computer. If this does resolve the issue, contact a supervisor. | |
| **Error message displays the following:**    **Caremark CTI Client application is not installed/working** | Perform the steps below when the following error message occurs - **Caremark CTI Client application is not installed/working:** | | |
| **Step** | **Action** | |
| **1** | Authenticate the caller. | |
| **2** | Verify if CTI is installed by checking Settings/Control Panel/Add or Remove Programs. If **CTI** is not installed, contact a supervisor for assistance.  Proceed to **Step 3** if CTI is installed, restart your computer. If this does not fix the issue, contact a supervisor for assistance. | |
| **CTI Screen is slow to pop up or delayed** | Refer to [Clearing your Cache (008655)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cd7acfcb-ad36-4da3-b973-faf08afb7dea). | | |
| **CTI Screen does not pop up** | Caller may not have entered anything into the IVR, or member’s record contains the following scenarios:   * Twins * Dual Eligibility * Multiple Cardholders | | |
| **Step** | | **Action** |
| **1** | | Verbally authenticate the caller and complete the call. |
| **2** | | Check **CTI Status** in the Tools menu. |
| **3** | | Restart your workstation.  If a problem is detected, ask the supervisor to open a ticket. |
| **Name given by caller does not match name in CTI screen** | Determine if the caller is inquiring about another adult member, verbally authenticate the caller and ask if the member is aware that they are calling on their behalf. | | |
| **If…** | | **Then…** |
| **Yes** | | Continue with the call. |
| **No** | | Refer to:   * [Universal Care - Consultative Call Flow (CCF) Process (095822)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c954b131-7884-494c-b4bb-dfc12fdc846f) * [Universal Care - Caller Authentication (004568)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bcb8da72-5501-4631-b9fd-fe675bc4a1fd) |
| **CTI application problem is detected** | | Restart your workstation. If a problem persists, contact the Supervisor for assistance. |
| **PeopleSafe screen has timed out** | Do not reenter your credentials; open the **Client Services** screen and click the **PeopleSafe** hyperlink. | | |
| **Access or Operation issue not addressed here** | Ask your supervisor to contact the CTI site SME. | | |
| **Accidently Closed CTI Window** | If the CTI pop-up is minimized you can review it by clicking on the white box with the black circle in it from the toolbar.    Alternatively, you can re-populate the CTI by selecting the Open CTI button on the Five9 softphone. This re-launches a new PeopleSafe browser requiring you to document and close out the previous browser before you can continue.  It is only advisable to select Open CTI when you need to re-launch the browser in PeopleSafe and re-populate the members information in that browser. | | |

|  |  |  |  |
| --- | --- | --- | --- |
|  |  |  |  |

[Top of the Document](#_top)

|  |
| --- |
| Reporting IVR Issues |

If a member reports problems accessing the IVR, apologize for the inconvenience; then complete the [IVR Research Request Procedures and Form (045732)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f40faeae-bfe0-40aa-87d1-fa1fbb23b5da) form and email as directed in the form.

**Note:**  If you have difficulties with this form, send the following information to your supervisor as a reported IVR issue.

* Member ID:
* Member’s Date of Birth:
* Member’s Name:
* Member’s Rx Number:
* Member’s Phone Number:
* Toll Free Number the Member Dialed:
* Time and Date of the Call:
* High Level Description of Issue:

[Top of the Document](#_top)

|  |
| --- |
| Related Documents |

* [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)
* [Customer Care Abbreviations, Definitions and Terms Index (017428)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c1f1028b-e42c-4b4f-a4cf-cc0b42c91606)
* **Parent Document:** [CALL 0049 Customer Care Internal and External Call Handling](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0049)

[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**