# Are you Maintaining Call Ownership (When a Call Should/Should Not Be Transferred)

[General Information](#_Toc204616576)

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**Description:** Outlines the guidelines for determining when calls should be handled by frontline agents versus transferred to dedicated teams, enhancing efficiency and member satisfaction.

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| General Information |

Do you know when a call should or should not be Transferred to a Dedicated Team?

**Background:** Caremark Member Operations and Customer Care continuously looks for opportunities to enhances the member and agent’s experience. In January we implemented a process to ensure basic call types can be handled by **ANY** customer service agent in the event a member may not have called the customer service number on their ID card. We also significantly reduced the number of client where transfers to a dedicated team is required.

**Benefit:** Improved agent and member satisfaction reducing transfers when not necessary. Increased agent understanding of basic call handling expectations when assisting members.

**Included Audience**: All Frontline Agents (Internal and Vendor) Excluded Audience: CarelonRx and Aetna

**Clients that require a transfer to the dedicated team:**

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| **Client Name** | **Lines of Business** |
| Commonwealth Care Alliance (CCA) | Medicare Medicaid |
| CVS/Caremark Employees | Commercial |
| FEP | Commercial |
| NEJE | Medicare |
| State of Georgia | Commercial |
| NRLCA | Commercial |
| GEHA | Commercial |
| BCBS MA | Commercial Medicare |

Did you know that **You can** assist callers who are normally serviced in a “site based” designated skill. Call Ownership allows you to assist without transferring the call.

**Examples:** SAT Specific, Southeast Specific, KC Specific etc.

Agents not trained for one of the below lines of business should transfer to the phone number listed in the Client Alerts/High Priority Comments or CIF:

* Aetna Commercial and Med D
* EGWP
* Medicare D

**Reminders:**

* Refer to the plan CIF for instruction and following the directions for client alerts.
  + If the CIF does not state that the client is dedicated maintain call ownership without transferring the call.
  +  If the CIF says the client has a designated team, but basic call handling can be performed, handle the call as normal and maintain call ownership without transferring the call if the member is calling for:
    - Refills, Payment Maintenance, Fulfillment Automation, Member Demographic Updates, CMP Alert Updates/Changes, Pharmacy Locator, or Rx Transfer Request (MOR to POS).
      * If call becomes a Plan Design related the call should be transferred to the number in the CIF.
* Agents should manage most member inquiries on first contact.
* As always, if you have questions touch base with your supervisor.

 To receive credit for completing this documentation review, complete the Learning HUB Acknowledgment 0000359365.

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| Related Documents |

[Compass and PeopleSafe - Transferring Calls to Dedicated Client Teams (062992)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=4c87518d-83f5-4884-8631-1f427b77da7d)

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