# PeopleSafe - When to Transfer Calls to the Senior Team

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**Description:** Process that a Commercial Customer Care Representative (CCR) should follow when determining proper escalation of a call and knowing when to contact the Senior Team for assistance.

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| High Level Process |
| 1. [**Determine**](#_Available_Task_Types) **the type of assistance needed from the Senior Team.**  * [Senior Assist](#_Assist) * [Procedural Transfer](#_Procedural_Quick_Transfer) * [Escalation Support](#_Process_for_Handling)  1. [**Provide**](#_Available_Task_Types) **the appropriate information to the Senior Representative:**  * [Senior Assist](#SenAssistInfo) * [Procedural Transfer](#ProcTransferInfo) * [Escalation Support](#EscalationInfo) |

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| Process |

Check back with the caller every few minutes unless they request otherwise. 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.



Verify a good call back number at the beginning of call.



**Long Hold Time:** Over five (5) minutes waiting for the Senior Team:



I understand your time is important; however, we are experiencing extended hold times for the Senior Team. Would you please continue holding?



* If yes, continue to hold for the Senior Team.
* If the **member refuses** to hold for the Senior Team or asks for a supervisor, contact your supervisor or a supervisor on duty and follow their direction. Check in with the member every two (2) minutes until a resolution is determined.

Senior Team’s Call Flow is to wait 30 seconds when they pick up if no one is on the line. If possible, without talking over member or sacrificing service, return to Senior Team line within 30 seconds.



Do not release the member from the call unless you connect and perform a warm transfer to the Senior Team.



Do **not** email or directly message a Senior Representative in Microsoft Teams. Do not provide phone number to members.



** Note:** If the incoming call is a Dedicated client that you normally would warm transfer, and the caller is requesting a supervisor immediately, warm transfer to their dedicated Senior Team. Refer to the Senior Team section in [Phone Numbers (Contacts, Departments, Directory, Addresses, Hours and Programs) (004378)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f22eb77e-4033-4ad9-9afb-fc262f29faad).

Perform the steps below:

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| **Step** | **Action** | |
| **1** | Determine the type of assistance needed: | |
| **If the caller/member…** | **Then…** |
| (This does not apply to MED D)  Called twice regarding an unresolved issue and this is the **3rd call within seven (7) calendar days**  **OR**  Indicates they have called multiple times for the same issue  **OR**  You identify that the member has a consistent history of unresolved issues for the same topic | Review [PeopleSafe - Handling Repeat Callers: Multiple Calls, Same Issue (045155)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=01ded425-9976-4840-b360-4619266505fc).  **Long Hold Time:** Over five (5) minutes waiting for the Senior Team:  Icon - Conversation I understand your time is important; however, we are experiencing extended hold times for the Senior Team. Would you please continue holding?   * If **yes**, continue to hold for the Senior Team.   Senior Team’s Call Flow is to wait 30 seconds when they pick up if no one is on the line. If possible, without talking over member or sacrificing service, return to Senior Team line within 30 seconds.  Check back with the caller every few minutes unless they request otherwise. 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.  Do not release the member from the call unless you connect and perform a warm transfer to the Senior Team. |
| Threatens legal action such as:   * I’m going to speak with my attorney. * I’m going to call the TV station to report this.   **Note:** If the actual attorney’s office or representative calls, connect to senior team. | 1. Add a note in PeopleSafe at the Member Level indicating the following: Mbr upset about <issue> and threatening legal action. 2. Make every attempt to resolve the caller’s issues immediately and on the first point of contact. Refer to [Frequently Asked Questions and Answers.](#_Frequently_Asked_Questions)  * If unable to resolve the caller’s questions, and/or the call requires **escalation** to a Supervisor, Manager, Vice President, Chief Executive Officer and/or the Medical Director of our PBM (includes members or providers asking to be transferred to our president and any other executives or threatening legal action). Warm transfer and properly introduce the caller to the Senior Team (Commercial **1-877-216-8707**, or [Med D (018060)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d3ca13af-f894-45b7-b16a-f2cb777adf77)). |
| All Other Issues:   * I never got a call back when I was promised. * I am going to take it up the ladder. * I was told it would be taken care of. * I want to talk to the CEO (Chief Executive Officer) or person in charge. | Make every attempt to resolve the caller’s issues immediately and on the first point of contact. Refer to [Frequently Asked Questions and Answers.](#_Frequently_Asked_Questions)   * If unable to resolve the caller’s questions or the member refuses assistance and requests to speak with a supervisor, continue to the next step. |
| **2** | ***Icon - Conversation*** I am going to reach out to our Senior Team for assistance with your issue, it may take me a few minutes to reach them. I will check back with you every five minutes until I reach them.  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.  Refer to [Compass - Basic Call Handling – Opening the Call, Call Hold, Warm and Cold Transfer](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0). | |
| **3** | Continue to the section titled: [Determine the Type of Assistance Needed from the Senior Team](#Determinethetypeofassistanceneeded). | |

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| Determine the Type of Assistance Needed from the Senior Team |

Refer to the table below:

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| **Reasons to contact the Senior Team:** | |
| [Senior Assist](#_Assist) | * General inquiries about a process, topic, work instruction or Client Information Form (CIF) * Unsure how to proceed with the member or additional guidance needed to complete the call * Cardholder Based Eligibility (only when the member is unable to wait the turnaround time period) |
| [Procedural Transfer](#_Procedural_Quick_Transfer) | * As directed by the CIF, Work Instructions, Job Aids, References or Announcements * Caller has made three (3) or more attempts toward resolution on any type of issue. Refer to [PeopleSafe - Handling Repeat Callers: Multiple Calls, Same Issue (045155)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=01ded425-9976-4840-b360-4619266505fc). * PBO CCR is not trained for or is unable to place   **Example:**  Maximum Dollar Override, GEHA 7X Override, directed to contact SRT by CIF.   * If an attorney's office is calling and asking to speak with someone to obtain the member's medical records * Updating Signature Required |
| [Escalation Support](#_Process_for_Handling) | * Caller requests a supervisor and/or higher (Manager, CEO, etcetera.) * Caller threatens legal action, going to the media, or contacting the CEO |

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| Senior Assist |

When the CCR has general inquiries, is unsure how to proceed with the member, or needs additional guidance to complete the call, follow the steps below:

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| **Step** | **Action** | |
| **1** | Review all resources to resolve the issue such as:   * CIF * Work Instructions * Job Aids * References * Team chat   **Note:** If unable to locate a resolution, proceed to next step. | |
| **2** | 1. Notify the member that you are making a call to help resolve their issue.   I will be providing your information so the representative is prepared to assist you. I will check back with you within 5 minutes to update you unless you would prefer that I check back with you every few minutes. Would you verify your phone number for me in case we are disconnected? Thank you.   1. **Warm Transfer** to the Senior Team (Commercial **1-877-216-8707**, or [MED D (018060)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d3ca13af-f894-45b7-b16a-f2cb777adf77)). | |
| **3** | Provide the following information to the Senior Representative:   * Your first name, first letter of your last name, and job title * Network ID (U/Z/C ID used to login to windows/Compass) **Example:** C1234567 * Member ID number * Member Name and DOB * Member has been fully authenticated * Identify the call as an Assist. * Clear and brief description of the issue   **Result:**  The Senior Representative will determine whether they should take over the call. | |
| **If...** | **Then...** |
| Resolution is provided by Senior Team representative | Return to caller, provide solution, and close call. |
| Interaction isn’t needed between the CCR and Senior | Continue to [Procedural Transfer](#_Procedural_Quick_Transfer) section. |

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| Procedural Transfer |

Use when the CCR is required to contact the Senior Team as directed by the CIF, Work Instructions, Job Aids, References or Announcements. Below is a list of potential procedural transfer reasons.

**Note:** These types of calls are **not** handled as warm transfers accepted by the Senior Team colleague and then CCR releases the call.

**Note:** Procedural calls require **assistance** from the Senior Team. The seniors will provide assistance with resolving the concern. Always use warm transfer procedures as there may be times where a senior will take over the call.

If the CCR is on the bi-lingual team and the Senior Team receives a Procedural Assist call, the Senior Team colleague will complete the necessary action and then release the call back to the bi-lingual CCR to complete the process. The Senior Team will not speak to the member in these instances.

Refer to [Compass - Basic Call Handling – Opening the Call, Call Hold, Warm and Cold Transfer](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0).

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| **Procedural Transfer Reasons** | |
| **Type** | **Details** |
| **Billing & Credits** | * [Return Order Request (Formerly Refund Copay Credit/Mail Tag Request) (060206)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7b80562c-60b7-4616-b431-c0a481c4c9cb) * [PeopleSafe - Credit for Expedited Shipping Charges - CCR (026438)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=2492f6f6-b55b-4f56-88f4-c17283a974cd) * Mail Tags * Credit requests * Billing research * Retail Check Reimbursements * COB Paper Claim Research * Paper Claim Copy |
| **CIF**  **(Client Information Form)** | * CIF instructs CCR to contact Senior Team * PBOs not available to CCR * EGWP Clients (Not EFWP Accounts, Non Medicare D) |
| **Mail Order** | * Shipping credits * Expediting orders (escalated) * Special dispensing requests * Reporting Class I Errors   **Note:** If order has shipped to incorrect address, CCR can reach out to senior for possible re-direct with shipping carrier. |
| **Work Instruction Driven** | * Adopt a Member * Adopt a Member – Enrollment Requests * AM for assistance with Mandatory Mail * Call pull request * DAW9 (Dispense as Written) * Eligibility due to member being loaded in incorrect system and coding error or if CIF states to not send member back to the client to have Account Manager contacted * Fraud * Large font request * Med D Fraud Waste & Abuse * MDO Complaints * Override (one time for a seven-day supply for Buprenorphine) * PBO CCR is not trained for or is unable to enter or directed to contact SRT for PBO by the CIF * Permanent Stop See (Add) Comments (CCR able to enter temporary Stop See Comments) * Prescription Rx Transfer - Has a valid prescription at a Retail pharmacy **and** has less than 3 days’ supply on hand **and** the CIF does not allow an override * PrudentRx - Member advised they have opted out of the program and are requesting an exception to a Non-Essential Health Benefits (EHB designation for their medication) * Repeat Caller (Refer to [PeopleSafe - Handling Repeat Callers: Multiple Calls, Same Issue (045155)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=01ded425-9976-4840-b360-4619266505fc)) * Standard Formulary Changes, as appropriate * Stop Totes (only if the CCR does not have access to email) * Terminate Discount Card * Unclaimed Property - Eight weeks has passed since the replacement check was reissued. Need to research. * Unclaimed Property - Unable to locate account for the claim * Unclaimed Property – Uncashed checks issued more than 180 days ago or checks not received * Unclaimed Property - Found check issued more than six months and less than two years ago |

Follow the steps below:

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| **Step** | **Action** | |
| **1** | Address the caller’s needs and questions.   * If the call falls under one of the categories listed above and all other issues have been addressed, proceed to step 2.   This does **not** include FEP. | |
| **2** | Notify the member that you are making a call to help resolve their issue.  We have a senior team that can assist with <issue>. I will be providing your information, so the representative is prepared to assist you. I will check back with you within 5 minutes to update you unless you would prefer that I check back with you every few minutes. Would you verify your phone number for me in case we are disconnected? Thank you.  Icon - Important Information Do not set the expectation that the member will be transferred to the Senior Team or that their request will be met. | |
| **3** | 1. **Warm Transfer** to the Senior Team.  * Commercial: 1-877-216-8707 * HealthPlan/EGWP:  1-877-209-5167, Option 1 * Blue Medicare Rx (NE-JE): 1-800-790-6382, Option 1 * SilverScript   **Note:**  Hawaii SRT Team hours.   * Sunday – Closed * Monday thru Fri 7:00am – 7:00pm HST * Saturday 8:00am – 4:30pm HST   All after hours calls should be handled by Commercial or Med D SRT.   1. Provide the following information to the Senior Representative:  * Your first name, first letter of your last name, and job title * Network ID (U/Z/C ID used to login to Windows/Compass) **Example:** C1234567 * Member ID number * Member Name and DOB * Member has been fully authenticated. * Identify the call as a procedural transfer * Clear and brief description of the issue   **Result:**  The Senior Representative will determine whether they should take over the call. | |
| **If the Senior Representative determines…** | **Then...** |
| The call should be transferred | Conference the calls and advise:  Icon_-_Conversation I have <Colleague Name> from the Senior Team on the line with us and I have explained that you need <issue>. They are ready to assist you.  Do not ask the caller if they need anything else at this point—address the caller’s request with the Senior Representative while the member is on hold. |
| This is **not** a procedural assist | Return to the caller and provide the solution. The Senior Team representative will advise of next steps.  **Callbacks to Members:**  If a callback to the member is required, identify who will call the member back and when they should expect that communication. Refer to [Order Shipping Turn Around Time (018691)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3338f261-4696-4e84-9019-43cc2eef3352).  **Example:**  Our pharmacy will call you back within 10 business days or you will receive an automated call regarding your request within 10 business days. |

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| Escalation Support |

When caller requests to speak to supervisor or higher, or threatens legal action, follow the steps below:

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| **Step** | **Action** | |
| **1** | Address all the member’s issue(s) and use the following script if the caller wants to escalate:  Icon_-_Conversation I understand your concern. Let me get you over to our Senior Team, I will be providing your information so the representative is prepared to assist you. I will check back with you within 5 minutes to update you unless you would prefer that I check back with you every few minutes. Would you verify your phone number for me in case we are disconnected? Thank you. | |
|  | **If the caller...** | **Then...** |
|  | Agrees to hold | 1. Reach out to the Senior Team. Refer to the CIF for dedicated team information.  * Commercial: 1-877-216-8707 * HealthPlan/EGWP Escalation: 1-877-209-5167, Option 2 * Blue MedicareRx (NE-JE) Escalation: 1-800-790-6382, Option 2 * SilverScript Escalation:  1-888-572-0869   **Note:** Hawaii SRT Team hours.   * Sunday – Closed * Monday thru Fri 7:00am – 7:00pm HST * Saturday 8:00am – 4:30pm HST   All after hours calls should be handled by Commercial or Med D SRT.   1. Clearly state this is an escalation and provide the following to the Senior Representative:  * Your first name, first letter of your last name, and job title * Network ID (U/Z/C ID used to login to Windows/Compass) **Example:** C1234567 * Member ID number * Member Name and DOB * Member has been fully authenticated. * Clear and brief description of the issue  1. Warm transfer and properly introduce the caller to the Senior Team representative.   I have <colleague name> from the Senior Team on the line. I have told them that you need <concern> and they are ready to help you.  Do not ask the caller if they need anything else at this point.  [Return to HLP Guide](#HighLevelProcessGuide) |
|  | Does not agree to hold | Contact your supervisor. |

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| Frequently Asked Questions and Answers |

Refer to as needed:

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| **#** | **Question / Statement** | **Answer / Resolution** |
| **1** | I need to speak to the President of your company! | Follow [Escalation Support](#_Process_for_Handling) above to move them to the next level of escalation.  A plan member should never be told that this cannot be done, or they will just tell you the same thing. |
| **2** | I cannot wait any longer and would like to speak to someone else/a supervisor immediately! | Icon_-_Conversation I understand your time is important, however, we are experiencing extended hold times for the Senior Team. Would you please continue holding?   * If **yes**, continue to hold for the Senior Team.   Do not allow the caller to hold more than five minutes without checking in with them even if they have given you an approval to hold until a resolution is determined.   * If the member refuses to hold and asks for a supervisor, contact your supervisor, and follow their direction.   **Icon - Important Information** Warm Transfer to the Senior Team prior to releasing the member from the call. |
| **3** | * I think that my account is mixed up with someone else’s. * Someone is using my account because there are prescriptions listed that I do not remember. * Someone has hacked my account. | Icon_-_Conversation We understand how upsetting an identity situation can be. Let me look at some information to see what we can do to resolve this concern. May I ask you a few questions?    Refer to [Reporting Alleged Fraud CCR (007636)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=c7d99a52-ae23-4ff8-a5ea-0bd3d2760015). |
| **4** | In the event the caller is Threatening legal action after all solutions have been offered, contact the Senior Team to obtain guidance for specific concerns. | Take ownership of member issues and offer resolution if available.  Icon - Important Information For the below statements, immediately warm transfer the caller to the Senior Team.   * I am going to speak with my attorney. * I want to talk to the CEO. * I am going to speak to the media.   I understand your concern. Let me transfer you to our Senior Team who can better assist you.  Warm Transfer to the Senior Team (Commercial **1-877-216-8707**, or [MED D (018060)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d3ca13af-f894-45b7-b16a-f2cb777adf77)).  When speaking with Senior Representative, advise them that it is an escalation call.  Introduce Senior Representative and advise caller that: Icon_-_Conversation I have explained your issue/concern and <Colleague Name> will assist you further. |
| **5** | Why am I being transferred to someone else for this request? | Icon_-_Conversation We have a separate team that manages these requests. |
| **6** | Caller refuses to be transferred | Icon_-_Conversation We have a separate team that manages these requests. |
| **7** | I have never had to be transferred before, when and why did this change? | Icon_-_Conversation This is a recent change. We have a more streamlined approach to fulfilling these requests. |
| **8** | For all inquiries related to member follow up | Icon - Important Information Do not email or Skype a Senior Representative or Case Coordinator directly; instead:   1. Research account thoroughly for answers or updates:  * If the issue is resolved, provide the resolution to the member. * If the issue is pending, place the member on hold.  1. Warm transfer the call to the Senior Team (Commercial **1-877-216-8707**, or [MED D (018060)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d3ca13af-f894-45b7-b16a-f2cb777adf77)) for further research/assistance.   Icon_-_Conversation I am going to reach out to our Senior team for assistance with your issue, it may take me a few minutes to reach them. I will check back with you every five minutes.   * Warm Transfer to the Senior Team (Commercial **1-877-216-8707**, or [MED D (018060)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d3ca13af-f894-45b7-b16a-f2cb777adf77)) prior to releasing the member from the call. Contact your supervisor and follow their directions. |

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| Related Documents |

[Customer Care Abbreviations, Definitions and Terms (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)

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