# Compass - When to Transfer Calls to the Senior Team

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**Description:** Used when determining the proper escalation of a call and knowing when to contact the Senior Team (SRT) for assistance.

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| Reminders |

**** 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.

**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. If hold times exceed 10 minutes, reach out to your supervisor for assistance. Your supervisor will handle accordingly.
* 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.

** Medicare D or EGWP:** Refer to [MED D - When to Transfer Calls to the Senior Team (062944)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7).

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| Process |

Complete the steps below:

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| **Step** | **Action** | |
| **1** | Determine the type of call. | |
| **Call Type** | **Definition/Action** |
| **Job Knowledge 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   1. Review resources to resolve the issue such as:   * CIF * Job Aids * Team chat * Work Instructions:   + [Compass - Customer Care Document Index (058484)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5adafaf7-02a1-49b8-b58b-3abceda07ad2)   + [Compass - Basic Call Handling – Opening the Call, Call Hold, Warm and Cold Transfer (066076)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0) * If unable to locate a resolution, notify the member that you are making a call to help resolve their issue:  Please allow me to place you on a short hold while I reach out to our Senior Resolution Team for assistance with your account.   2. Proceed to Step 2. |
| **Senior Team Procedural Assist**  **(Lifeline Quick Assist)** | The request includes one of the following:   * Mail Tag requests.   **Note:** Prior to reaching out to Lifeline Quick Assist for a mail tag, refer to [Compass - Return Order Request (Formerly Refund Copay Credit/Mail Tag Request) (058097)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9e7e3115-e2d6-41c6-bd9e-83a67e0ec196).   * Procedural Override requiring Senior Team assistance. Refer to [Compass - Plan Benefit Override (PBO) Guide (061708)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44418b02-7e70-41cc-bb2e-bb38164a951f). * Other Override or Procedural assists as directed by the CIF or Work Instruction, examples include:   + - CIF includes a process for **COB- Reject 41** and resolution requires Senior Team to flip COB flag in AS400     - Commercial Medicaid procedural override requests that only Senior Team is authorized to enter     - Credit requests and CIF allows credits or does not specify     - As directed by CIF or Work Instruction Cash Cards. Refer to [Compass - Drug Discount Card Program and RxSavingsPlus (062872)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=8e561110-5fc0-43ed-a589-5c0904df1a10)     - Backdate, edit, or modify Mchoice opt out. Refer to [Compass - Maintenance Choice (MChoice) Opt Out (053799)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=071ddb5a-1f72-4cef-baa6-5164c512e782) * Edits are needed due to PA Layering   Please allow me one or two minutes to process your request for <reason for call (mail tag, override, etc.)>.  Refer to [Compass – Lifeline Quick Assist (072646)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cfa341fa-0ce1-4886-9650-f3cb112508e7).  **Note:** CCR should not place member on hold. Any **Lifeline Quick Assist** wait times should be used to conduct an account wellness review with the member.  If Lifeline Quick Assist has not resolved the concern after 6 minutes, complete a procedural transfer to the senior team. |
| **Senior Team Procedural Transfer** | * + As directed by the CIF, Announcements, Work Instructions, and Job Aids. Refer to Procedural Transfer Reasons Chart   + Repeat Caller, refer to [Compass - Handling Repeat Callers: Multiple Calls, Same Issue (057523)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ba08434f-a17e-41de-9428-33f453416a6b)   + 3 (three) or more calls within 7 consecutive days for the same issue   + Member indicates they have called multiple times for the same issue   + From the case comments, you recognize the member has a history of calling on the same issue that remains unresolved regardless of the time-period   + An Attorney's office is calling and asking to speak with someone to obtain the member’s medical records   + Updating Signature Required   Warm transfer these calls to the Senior Resolution Team after all other questions, issues, and concerns have been resolved.  Proceed to Step 2. |
| **Senior Team Escalation** | CCR needs assistance with an issue that requires **immediate** action, including, but not limited to, the following examples:   * Caller continues to request to speak to a supervisor * Caller continues to request to speak to “someone else” * Caller is highly agitated or demanding immediate action * Caller is threatening legal action, to contact the media, to contact other members, to post to social media, or file a complaint with the State Board of Pharmacy, or to contact other government entities   **Note:** Attempt to resolve the member’s reason for calling. Refer to the appropriate work instruction for further information:   * + [Compass - Member Low or Out of Medication (063003)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=91f73b9d-e568-48dd-9ab4-88cb2654d4c9)   + [Compass - Alleged Non-Conformance and Call Pull Requests (065109)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6e9f56f6-783d-472b-9deb-c259c1b2a224)   + [Compass - Reporting Alleged Fraud CCR (057131)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ba630879-142f-4c5a-89c6-50b5018fe3b6)   + [Compass - Customer Care Document Index (058484)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5adafaf7-02a1-49b8-b58b-3abceda07ad2)   If you are **unable** to resolve reason for calling:  I understand your concern. I will be more than happy to get you to a colleague who can further help/assist with your inquiry.  Proceed to Step 2. |
| **2** | Call the **Commercial Senior Resolution Team** phone number: 1-877-216-8707.  **Note:** This is for internal use only. **Do not give the Senior Team Resolution number to the member**.  **Reminder:** Five9 users should utilize speed dial 010. Refer to (Insert hyperlink to [Compass - Five9 Agent Desktop Phone (056045)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad8f7284-fee0-4ae1-bbbd-d2cbe07a331f).  **Result:** Senior Resolution Team will answer the line with a greeting, such as:  Thank you for calling the Senior Resolution Team. This is < Senior’s First Name >; how can I help? | |
| **3** | Proactively offer the Senior Resolution Team the following information:   * Hello, this is <**CCR First Name**>.  * I have a(n) < **warm transfer**, **escalation**, or **assist** >.  * The **caller’s name** is <caller’s name>, and they < **have** or **have not been** > authenticated.  * The **member ID** is <member’s ID>, and the **member’s name** is <member’s name>.  * Indicate if the member has called **three (3) or more times** regarding the same subject. | |
| **4** | Describe the member’s issue in a clear and concise manner.  **Tips:**   * Focus on providing the 5 W’s: Who, What, Where, When, and Why. * Member’s intended resolution should be clear. * Include if any work has been completed (such as email sent, opened Task, etc.). * Keep the conversation professional. Communicate the issue the member is concerned about and make each word meaningful and relevant. | |
| **5** | Complete the warm transfer by introducing the caller to the Senior and releasing the call:  I have < **Senior’s First Name** > on the phone to help you further.  Do not introduce the Senior agent as a supervisor. | |

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| Procedural Transfer Reasons |

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

Refer to [Compass - Customer Care Document Index (058484)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5adafaf7-02a1-49b8-b58b-3abceda07ad2).

**Note:** The Senior Team will determine if the call requires a warm transfer.

Refer to the table below:

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| **Type** | **Details** |
| **Mail Order** | * Expediting orders (escalated) * Special dispensing requests   + Refer to [Compass - Dispensing Special Instructions (ScripTalk, Braille, Large Font, Signature Required, Language, Blister Packs) (053542)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7e45fb8b-f0e4-437e-9238-c8e37a504de8) * Specific reship scenarios, refer to [Compass - Order Reships (057985)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a6851523-18b2-4009-90a5-8fd53ee9669b)   **Note:** Refer to appropriate order status documents in the [Compass - Customer Care Document Index (058484)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5adafaf7-02a1-49b8-b58b-3abceda07ad2) prior to contacting Senior Team |
| **Billing** | Refer to [Compass - UnClaimed Property/Checks Not Cashed (062887)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=589a4793-e6c7-472a-a95d-1e7dd43e0f3b). |
| **Work Instruction Driven** | * Adopt a Member * Adopt a Member – Enrollment Requests * AM for assistance with Mandatory Mail * Call pull request * **MDO** (Medical Doctors Office) Complaints * Permanent comment needs to be added to the account * **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 (Multiple Calls for Same Unresolved Issue) * Suspicion of abuse or over-utilization of ANY medication |

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| Frequently Asked Questions and Answers |

Refer to the table below:

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| **#** | **Question / Statement** | **Answer / Resolution** |
| **1** | I need to speak to the President of your company! | Warm Transfer to the Senior Team (Commercial: **1-877-216-8707**).  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. If hold times exceed 10 minutes, reach out to your supervisor for assistance. Your supervisor will handle it accordingly.   **Notes:**   * 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 allow the caller to hold more than five (5) 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. * Warm Transfer to the Senior Team prior to releasing the member from the call. * Do not release the member from the call unless you connect and perform a warm transfer to the Senior Team. |
| **3** | * 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 [Compass - Reporting Alleged Fraud CCR (057131)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=ba630879-142f-4c5a-89c6-50b5018fe3b6). |
| **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.   Icon_-_Conversation I understand your concern. Let me transfer you to our Senior Team who can assist you better.  Warm Transfer to the Senior Team (Commercial: **1-877-216-8707**).  When speaking with Senior Representative, advise them that it is an escalation call.  Introducing Senior Representative and advise caller: 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 message a Senior Representative or Case Coordinator directly; instead:   1. Research account thoroughly for answers or updates:  * If the issue is resolved, provide 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**) 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. |
| **9** | Bi-lingual CCR/Member | 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. |
| **10** | What should I do if member 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 Office or representative calls, connect to the Senior Team. | a. Refer to [Compass - Close an Interaction or Research Case (050011)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0296717e-6df6-4184-b337-13abcd4b070b) to add a case comment indicating the following: “Member upset about <issue> and threatening legal action”.  b. Make every attempt to resolve the caller’s issues immediately and on the first point of contact.   * 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 Pharmacy Benefit Manager (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**). |

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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 (017428)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c1f1028b-e42c-4b4f-a4cf-cc0b42c91606)

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