# PeopleSafe - Dispositioning HEE Opportunities – Coaching

[Presenting the Opportunity](#_Toc60136157)

[Disposition the Opportunity](#_Toc60136158)

[PeopleSafe Dispositions](#_Toc60136159)

[Frequently Asked Questions and Answers](#_Toc60136160)

[Related Documents](#_Toc60136161)

|  |
| --- |
| Presenting the Opportunity |

Refer to as needed.

|  |  |  |
| --- | --- | --- |
| **Option** | **Action** | **Description** |
| **Yes** | Presented to the caller | Able to present the opportunity and educate caller about specific opportunity. The caller listened to the opportunity and either accepted, rejected, or declined it. |
| **No** | Attempted to present to the caller/did not present to caller | **Did not** present to the caller for any reason or if you clicked on “View Opportunities” but was not able to present because the member dropped off the phone or was in a hurry. |
| **Later** | Use “No” Option instead of “Later” | Attempted to offer the opportunity but could not complete the presentation. |

[Top of the Document](#_top)

|  |
| --- |
| Disposition the Opportunity |

Refer to as needed.

|  |  |  |
| --- | --- | --- |
| **Option** | **Action** | **Description** |
| **Positive with action** | Information is well received by the plan member and action was taken during the call. | **Examples:**   * Sent new Rx request. * Transferred to FastStart. * Representative enrolled an Rx in refill or renewal. * Create opportunity or MChoice Transfer.   Giving the phone number is NOT taking action, you must transfer the member if the HEE requires you to contact another department (**Example:** Pharmacy Advisor or FastStart). |
| **Positive Response** | Information was received in a positive manner by the plan member. They will likely use it at some time in the near future, but action was not taken during the actual call. | **Examples:**   * Maybe I will set up Auto Refill (ARP) after this order. * I will call my doctor and have them send in a prescription. * I will go online. * Not right now. * Maybe later. * If you give the member the phone number in the HEE, but you do not transfer while on the line (**Example:** Pharmacy Advisor or Fast Start). |
| **Not interested**  This will remove the HEE for specified medication for 6 months. | Member was Not Interested and Does Not want to discuss the opportunity at a future date, or it does not apply to their current situation. | **Examples:**   * I said no! * I tell you every time I call, I do not want that! * I want to stay at my local pharmacy!   Do not proactively offer the opt out. This should only be offered when member is escalating; you then may offer the “Opt Out” to prevent an escalation! |
| **Inappropriate**  Occurrences should be rare. This completely removes the opportunity for the specified medication (Rx #) completely. | This option should be used only when the system incorrectly targets a member for an opportunity or member not able to access the benefit or unique situation that does not fit the other disposition options, NOT for how the member feels about the opportunity. | **Examples:**   * No internet or smart phone * No longer taking medication * Already registered in Auto Refill Program (ARP) * Not a maintenance medication |

[Top of the Document](#_top)

|  |
| --- |
| PeopleSafe Dispositions |

Save all calls as shown below:



* Education
* Mem/Dep
* Incoming phone call

Review this on **every call** as some changes automatically save if it is not changed every time that you enter/exit the members PeopleSafe Account.



**Exceptions and Changes with dispositions**:

|  |  |  |
| --- | --- | --- |
| **Disposition** | **Education** | **All Authenticated callers** |
| **Research** | Disposition **Research** with caution. This is only approved for use on the specified scenarios in this document. If found using for any other reasons by utilizing Research will result in a FAILED call through quality and coaching’s. | * Wrong account * Not eligible * Misrouted call * Follow up * Dead Air * Caller released within 1 min or less. |
| **Source Of Contact** | Mem/Dep | Member themselves, authenticated 3rd party caller who can place refill. |
| Client | Dedicated team where you are required to transfer, Plan Sponsor. |
| MOR pharmacy | Accredo, Express Scripts, etcetera. |
| Prescriber | Doctor or Doctor representative from the office. |
| Retail Pharmacy | Local Pharmacy Representative |
| CMRK Account Manager | Account Manager |
| **Form Of Contact** | Incoming phone call | All authenticated callers |
| In-house Research | Wrong Account, Follow-ups, Dead Air, or Caller released within 1 min or less. See above disposition for more specific details. |

[Top of the Document](#_top)

|  |
| --- |
| Frequently Asked Questions and Answers |

Use as needed:

|  |  |  |
| --- | --- | --- |
| **#** | **Question/Statement** | **Answer/Resolution** |
| **1** | How do I document a dropped call if it occurred before the one-minute mark? | Research and add note: Member released the call before the one-minute mark; unable to present HEE opportunities. |
| **2** | What happens if I receive a dead air call?  **Examples:** No caller on line/beeping on line/hold music. | Repeat call opening three times with pauses in between each greeting.  **Note:** Attempt a total of three (3) times and wait 10 seconds between each attempt. Refer to [Disconnected, Dropped, No Caller (Ghost Calls), Spam, Automated, and Looping Calls (021760)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=480af287-dcb8-4305-84c5-dfe8e0c39312).  **Tip:**  Upon answering the phone and there is a dial tone, but no one seems to be on the line, press \*7 on your phone. If there is a caller, it will bring them on the line.  **Memo account:** No caller on the line, disconnected after no response. Unable to present HEE. |
| **3** | What happens if you mark “Yes”, and “Positive w/Action” and it was a true mistake? | * **In account:** Change the HEE disposition accordingly. * **Logged out:** Reenter the account and leave a comment on the account as follows: Accidently dispositioned HEE incorrectly (explain with details). This is so Quality Analyst/Supervisor can see what happened when they are performing a call pull for quality/coaching. |
| **4** | What if you disposition the HEE with “LATER” for presenting? | This is the equivalent of dispositioning “no”. |

[Top of the Document](#_top)

|  |
| --- |
| Related Documents |

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

[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**