# Compass - View and Present Opportunities from the Health Engagement Engine (HEE)

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**Description:** Steps to view and present Opportunities fromthe Health Engagement Engine™ (HEE™) in Compass. HEE technology helps deliver innovative health care solutions to our members by identifying and displaying opportunities for CCRs to present during the course of a member call depending on the client’s offerings. CCRs are able to follow the priority order or quickly assess the best opportunities to present to the caller, discuss the Opportunities with Consultative Call Flow (CCF) verbiage, and accurately register the outcome of the opportunity offer in Compass.

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| Identify and Present Opportunities |

**Note:** When discussing HEE Opportunities with the caller, remember to refer to [HIPAA Grid (028920)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce).

Complete the steps below:

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| **Step** | **Action** | |
| **1** | Identify if there are Opportunities offered from either an orange messaging banner on Member Snapshot, the Claims Landing Page, or in the **Opportunities** section located on the right panel of the Member Snapshot (under Quick Actions).  **Opportunities Banner**    **Opportunities Section**    In the **Opportunities** table, the following columns display:   * Opportunity * Member * Relationship | |
| **If…** | **Then…** |
| The orange banner displays the message **Opportunities are available** | One or more Opportunities are available for the member. Click the **View All** link from the banner to open the Opportunities screen.  **Note:** The messaging banner will not display when there are no open Opportunities to present for the member(s) on the account. (Opportunities that are available will be for members 18 years of age and older.) |
| Eligible member names are listed in the **Opportunities** section on the Member Snapshot screen | One or more Opportunities are available for the listed member(s). Click **View All** from the bottom of the **Opportunities** section to open the Opportunities screen.  **Notes:**   * In the **Opportunities** table the following columns display:   + Opportunity   + Member (name)   + Relationship (to cardholder) * The **Opportunities** table displays opportunities at the member level (18 years of age and up). * If a member’s name is not listed, no opportunities are available for that member. If the **Opportunities** section states “No Records Found”, no opportunities are available for the Family. |
| **2** | From the **Opportunities** tab, verify that the caller is selected from the **Additional** **Members** dropdown.      **Notes:**   * Family members (18 and older) with open opportunities available can be viewed via the **Additional Members** dropdown. The agent will have the option to expand/collapse each member. * If the selected member is the cardholder or spouse, any activity for dependents under age 18 should display UNLESS the medications are Birth Control, Anti-Psychotic, or Sensitive Drug list medications. * Only opportunities for the accessed account will display.   If Birth Control, Anti-Psychotic, or Sensitive Drug List medications display for dependents under age 18, DO NOT present. Instead, mark the HEE as Inappropriate.   * + If an inappropriate HEE opportunity displays, appropriately close the call and create an email to your Supervisor as follows:  1. In the Subject line of the email indicate: **\*\*Securemail\*\*** HEE System Issue (Contains PHI). 2. In the Body of the email, include the following information: Member’s name, Member’s ID, Client Code, RxClaim Platform, and a brief explanation of the occurrence.   **Result:** Opportunity is displayed. | |
| **3** | Click the **Row level action** drop-down arrow for the Opportunity with the appropriate member’s name, then select **Present To Member**.      **Result:** The **Present Opportunity** box displays.  **Note:** You can also reach the Present Opportunity box directly from the **Opportunities** section of the Member Snapshot screen by clicking the **Row level action** drop-down arrow and selecting **Present To Member:** | |
| **4** | Paraphrase the information in the **Present Opportunity** box to the member, then register the outcome as follows:   * Select the appropriate **Able to Present** radio button: Yes, No, or Later. * Select the appropriate option from the **Disposition** drop-down list. * Add Comments as needed.   For additional information, refer to the [Present Opportunity Scenario Guide](#_Present_Opportunity_Scenario).    **Note: Medicare D** HEE opportunities adhere to all legal and regulatory guidelines as well as those of Centers for Medicare and Medicaid (CMS) pertaining to all matters including Ship Consent. For the Auto Refill (ARP) program, refer to Compass [Compass MED D - Expressed Consent (Ship Consent) (061810)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a5d5d1eb-261c-4b79-a4b8-23605297f262) for more information. | |
| **5** | Select the **Save** button to complete the opportunity registration.  **Note:** To exit, click **Cancel**.    **Result:** The Opportunities screen displays. | |

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| View Opportunity History |

Complete the steps below:

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| **Step** | **Action** |
| **1** | From the **Opportunities** section located in the right panel of the Member Snapshot screen, click the **View All** hyperlink.  **Result:** The Opportunities screen displays. |
| **2** | From the Opportunities screen, click the **History** tab.    **Result:** TheOpportunities History screen displays with the following columns:   * Type * Channel (such as Care, Inbound IVR, and Inbound Digital) * Member * Relationship * Date Presented (automatically sorts by this column, with most recent at the top) * By (**Example:** COEBATCH) * Disposition |
| **3** | Filter the Opportunities as needed by using the View by **Member** and **Opportunity Type** dropdowns.  **Note:** The **Member** and **Opportunity** filters will default to **All**.  **Example:** |

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| Update Opt-Out Preferences |

 **Internal Only (Do Not Communicate to Member):** The only time we would Opt Out a member from an HEE Opportunity is if they specifically requested it, or to prevent an escalation. Once Opt Out is selected, the Opportunity will not redisplay in the future.

**Note:** The Opt Out expires if the member starts a new plan or if they request to have the Opt Out removed. This does not apply to the MTM program.

Complete the steps below:

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| **Step** | **Action** |
| **1** | From the **Opportunities** section located in the right panel of the Member Snapshot screen, click the **View All** hyperlink.  **Result:** The Opportunities screen displays. |
| **2** | From the Opportunities screen, click the **Opt-Out Preferences** tab.    **Result:** The Member Opt-Out Preferences screen displays.    **Note:** No changes can be made to Opt-Out Preferences unless the agent clicks, **Edit**. |
| **3** | Click **Edit**, then select the checkboxes for the appropriate opt-out options.    **Notes (see the screenshot below):**   1. Options can be filtered by Member name via the View by **Member** dropdown. 2. CCRs can opt member(s) in/out of all programs via all communication channels by clicking the **Opt-In All**/**Opt-Out All** hyperlinks. 3. CCRs can opt member(s) out of a communication channel (all programs) by clicking the checkbox next to the appropriate **Channel** column heading (**Example:** Print, Caremark.com, eMail, Outbound IVR, ePrescriber, MinuteClinic, Care, Inbound IVR, or Retail Pharmacy). 4. Options can be sorted by Program Title by clicking the **Program Title** column heading. |
| **4** | Click the **Save** button to confirm the opt-out preferences or click the **Cancel** button to return to the previous screen. |

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| Report System Error - Unable to Present HEE Opportunities |

Complete the steps below:

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| **Step** | **Action** |
| **1** | Obtain a screenshot (Using Snag It) of the problem that is occurring.  **Note:** If you are unfamiliar with using the Snag It software, contact your Supervisor or the IT Service Center for Assistance. |
| **2** | Create an email and paste the screenshot into the body of the email. |
| **3** | Type the following in the Subject line of the email: **\*\*Securemail\*\* HEE System Issue (Contains PHI)**. |
| **4** | Include the following in the bodyof the emailif the information is not captured in the screenshot:   * Member’s name * Member ID * Client name * RxClaim platform |
| **5** | Send the email, along with a short description of the problem, to your Supervisor and they will open a Service Center Ticket.  **Supervisors Only:** Access **MyLife**then select“**IT Service Center**” to open an HPSM ticket. |

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| Present Opportunity Scenario Guide |

Refer to the table below:

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| **Scenario** | **Action** |
| Opportunity was presented to the caller  **AND**  The caller listened to the opportunity and **accepted it**  (Action performed based on the caller’s response to the opportunity.) | * For **Able to Present**, select **Yes**. * For **Disposition**, select **Positive Response w/ Action**. * Perform the appropriate action.   **Example:** Enrolling medications in Auto Refill or sending a New Rx Request for a 90-day Home Delivery / Mail Order prescription. |
| Opportunity was presented to the caller  **AND**  The information was received in a positive manner; however, the caller **does not want any action taken** at this time | * For **Able to Present**, select **Yes**. * For **Disposition,** select **Positive Response**.   **Result:** The Opportunity displays again the next time the account is accessed. |
| Opportunity was presented to the caller  **AND**  The member was **not interested** and does not want to discuss the opportunity at a future date. | * For **Able to Present**, select **Yes**. * For **Disposition**, select **Not Interested**.   **Result:** The Opportunity displays again in three months when the account is accessed. |
| Opportunity was presented to the caller  **AND**  It **does not apply** to their current situation | * For **Able to Present**, select **Yes**. * For **Disposition**, select **Inappropriate**. * Notify your Supervisor of an Inappropriate offering by sending them an email as follows: * **Subject Line:** \*\*Securemail\*\* HEE System Issue (Contains PHI) * **Body of Email:** Indicate the RxClaim Platform with the Member’s name, Member’s ID, and Client Code. |
| System incorrectly offers the opportunity under cardholder or spouse for dependents for sensitive medications (such as Birth Control, Anti-Psychotic, or Sensitive Drug List medications)  **DO NOT present!** | * For **Able to Present**, select **No**. * For **Disposition**, select **Inappropriate**. * Notify your Supervisor of an Inappropriate offering by creating and sending them an email as follows: * **Subject Line:** \*\*Securemail\*\* HEE System Issue (Contains PHI) * **Body of Email:** Indicate the RxClaim Platform with the Member’s name, Member’s ID, and Client Code |
| System incorrectly offers a duplicate opportunity in the current account  **Note:** These occurrences should be rare.  **Example:** Duplicate Opportunity for the same member:  A screenshot of a computer  AI-generated content may be incorrect. | * Do NOT present the same opportunity again. * For **Able to Present**, select **Yes**. * For **Disposition**, select **Inappropriate**. |
| Opportunity was not able to be presented | For **Able to Present**, select **No**. |
| Opportunity was for a family member who is not present to accept or reject the offer | For **Able to Present**, select **Later**. |
| Opportunity was unable to be presented due to the system not working  **Note:** These occurrences should be rare. | Proceed to the [Report System Error - Unable to Present HEE Opportunities](#_Report_System_Error) section. |
| Opportunity was presented, but the member does not wish to be reminded of the programs that are available to them | Contact the Senior Team or Supervisor for approval to opt out the member. Only after receiving approval, proceed to the [Update Opt-Out Preferences](#_Update_Opt-Out_Preferences) section. |
| Opportunity was presented to the caller  AND  The caller has secondary coverage | Any updates or opportunities enacted on the primary will be updated on the secondary automatically. |

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| Related Documents |

[Compass - Close an Interaction or Research Case (050011)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=0296717e-6df6-4184-b337-13abcd4b070b)

[Member Engagement Call Flow (023057)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18ad4891-9af6-4a07-bb7d-be0fc1119654)

[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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