# Compass - Calling Issues Messaging Platform or Automated Outbound Calls and Do Not Call

[Automated Outbound Calls](#_Toc196740380)

[Automated Calling Issues](#_Toc196740381)

[Identifying Outbound Calls from Our Mail Order Pharmacy](#_Toc196740382)

[Do Not Contact (Member Associated with Messaging Platform Client)](#_Toc196740383)

[Not Receiving Alerts (Member associated with Messaging Platform Client)](#_Toc196740384)

[Misdirected Calls/Messages (Member Asking to be Added to the Do Not Call List)](#_Toc196740385)

[Related Documents](#_Toc196740386)

**Description:** Information about outbound calls that the member may receive and how to identify those calls in Compass. It includes how to identify the types of calls that members receive along with instructions for adding to the Do Not Call list.

|  |
| --- |
| Automated Outbound Calls |

Our Pharmacy Benefit Manager works with several vendors to provide different types of automated outbound calls. Many of these utilize a “self-service” IVR system where the member can obtain information and perform certain actions.

If a call is received from a member regarding an automated outbound call, review the Communications screen, Case History, and Case Comments for recent communications to the member.

**Note:** Always perform an Account Wellness check to determine the reason for the outbound call (held orders, etc.). Refer to [Universal Care - Consultative Call Flow (CCF) Process (095822)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c954b131-7884-494c-b4bb-dfc12fdc846f).

Primary types of Automated Outbound Calls:

|  |  |
| --- | --- |
| **General Call type** | **Description** |
| Messaging Platform Automated Calls | The most common automated outbound calls are initiated through [Compass - Obtaining an Email Address and Messaging Platform (054195)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=16d97031-aab3-4e30-b5d8-69ba322678d6).  These include informational types of calls, such as order status, refill reminders, savings alerts, and those associated with the [Compass - Auto Refill Program (ARP) (056033)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f843bc3f-55cc-4223-b2fc-03aff60cdf4c).  **Note:** Members transferred to Care from the outbound IVR are fully authenticated. |
| Automated Refill Adherence Calls | These are interactive calls that inform the member they are overdue for a refill and provide the opportunity to order the prescription through the IVR and provide consent to refill prescription(s).  **Note:** Members transferred to Care from the outbound IVR are fully authenticated.  Records of these calls are found on the Communication History screen, available from the **Quick Actions** panel. |
| Miscellaneous informational and promotional automated calls | These calls are initiated for varying reasons.  **Note:** Members transferred to Care from the outbound IVR are fully authenticated.  To review automated outbound call activity notes:   * **PeopleSafe Users:**Swivel to PeopleSafe and refer to [PeopleSafe - Accessing and Reviewing Automated Outbound Call Activity Notes (020244)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=820d0759-183a-4547-aa31-00bb8b25a0d0). * **Compass Only Users:** Contact the Senior Team for assistance with reviewing call activity notes. |

[Top of the Document](#_top)

|  |
| --- |
| Automated Calling Issues |

Perform the following steps when a member reports an automated call issue:

|  |  |  |
| --- | --- | --- |
| **Step** | **Action** | |
| **1** | Ask probing questions to determine the member is calling about an automated outbound call. | |
| **2** | From the Member Snapshot Landing Page, navigate to the **Quick Actions** panel and click the **Communications** hyperlink to review recent communications to the member. Refer to [Compass - Viewing Communications (056371)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c0238ae3-ea9b-4da2-b9c9-90c8d4ad62a8). | |
| **3** | Navigate to the **Messaging Preferences** panel from either the Member Snapshot Landing Page or the Claims Landing Page. | |
| **4** | Review the **Messaging Preferences Programs** list to determine if the client has opted in. Refer to [Compass - Obtaining an Email Address and Managing Messaging Platform (MP) Notifications (054195)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=16d97031-aab3-4e30-b5d8-69ba322678d6).  **Note:** All clients are opted in to the Messaging Platform by default. If a program does not display in the **Messaging Preferences Programs** list, it is not available for the client. | |
| **If program is...** | **Then...** |
| Available | * Determine type of message received (phone, email, or text), and the phone number, email address, or text messaging address in question. * Review the Messaging Platform preferences for the member.   **Additional Resources:**   * [Do Not Contact (Member associated with Messaging Platform Client)](#_Available_Task_Types) * [Not Receiving Alerts (Member associated with Messaging Platform Client)](#_Various_Work_Instructions_3) * [Misdirected Calls/Messages (Member Asking to be Added to the Do Not Call List)](#_Misdirected_Calls_1) |
| Not available **BUT** the member is receiving program alerts | Ensure all other concerns are resolved for the member first, then:  I am going to reach out for assistance with your issue; it may take me a few minutes to reach them. Would you prefer to hold until I reach them, or would you prefer that I check back with you every few minutes?  **CCR:** [Warm Transfer to the Senior Team (057524)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7653e7c2-1a97-42a0-8a81-6267c72e1ca9) and provide the member’s ID number.  **Note:** If the Senior Team is not available or has a long hold time (5 or more minutes); contact a supervisor.  **Result:** Senior Team sends a message to both the IVR team and the Messaging Platform administrator to resolve the issue.  Do not allow the caller to hold more than five (5) minutes without checking in with them even if they have given you approval to hold until a resolution is determined. |

[Top of the Document](#_top)

|  |
| --- |
| Identifying Outbound Calls from Our Mail Order Pharmacy |

Perform the following steps when a member calls Customer Care concerned about a message they received, questioning its authenticity from us:

|  |  |  |
| --- | --- | --- |
| **Step** | **Action** | |
| **1** | Ask the member for the number that displayed on their caller ID. | |
| **If the member…** | **Then…** |
| Has the number from the caller ID | Skip to Step 3. |
| Does not have the number | Proceed to Step 2. |
| **2** | * **PeopleSafe Users:**Swivel to PeopleSafe and refer to [PeopleSafe - Accessing and Reviewing Automated Outbound Call Activity Notes (020244)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=820d0759-183a-4547-aa31-00bb8b25a0d0). * **Compass Only Users:**Refer to [Compass - Viewing Member's Recent Cases and Viewing PeopleSafe Activity (RM Task Information) in Compass (056036)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ab5a6f09-8f08-424b-bff7-b1aa5cfc4d6a). Agents can contact the Senior Team for assistance with reviewing call activity notes. | |
| **If outbound call information…** | **Then…** |
| Displays | Assure the member that we did make the call to them. |
| Does NOT display | Proceed to Step 3. |
| **3** | Review the [Outbound Phone Numbers Displaying on Caller ID (042944)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f9fd8f60-2089-4362-824c-7b410d12744a) document to search for the caller ID number, which identifies the department who called the member.  **Note:** Automated outbound mail adherence calls from our Mail Order Pharmacy provides a reference number, as well as ask for the member’s date of birth to confirm they have the correct recipient. Asking a member if they received a reference number is a possible way to confirm if the call was made from our Mail Order Pharmacy. The reference numbers are not visible in Compass. | |
| **If the number is…** | **Then…** |
| Located | Assure the member that we did make the call to them. |
| Not located and the member is concerned that the call was fraudulent | [Warm transfer to the Senior Team (057524)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7653e7c2-1a97-42a0-8a81-6267c72e1ca9) or a supervisor for further research. |

[Top of the Document](#_top)

|  |
| --- |
| Do Not Contact (Member Associated with Messaging Platform Client) |

Perform the following steps if the member wishes not to be contacted:

|  |  |
| --- | --- |
| **Step** | **Action** |
| **1** | Ask probing questions to determine the member is calling about a member communication. |
| **2** | From the Member Snapshot Landing Page, navigate to the **Quick Actions** panel and click the **Communications** hyperlink to review recent communications to the member. Refer to [Compass - Viewing Communications (056371)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c0238ae3-ea9b-4da2-b9c9-90c8d4ad62a8). |
| **3** | Navigate to the **Messaging Preferences** panel from either the Member Snapshot Landing Page or the Claims Landing Page. |
| **4** | Update Messaging Preferences types to “Member Opted Out” as requested. Refer to [Compass - Obtaining an Email Address and Managing Messaging Platform (MP) Notifications (054195)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=16d97031-aab3-4e30-b5d8-69ba322678d6). |
| **5** | Educate the member on self-service options via the web portal. |

[Top of the Document](#_top)

|  |
| --- |
| Not Receiving Alerts (Member associated with Messaging Platform Client) |

**Note:** Members on the Do Not Call list will not receive CMP alerts via a phone call.

Perform the following steps if the member indicates they set up their Messaging Platform preferences but have not received any messages or alerts:

|  |  |  |
| --- | --- | --- |
| **Step** | **Action** | |
| **1** | Ask probing questions to determine the member is calling about a member communication. | |
| **2** | From the Member Snapshot Landing Page, navigate to the **Quick Actions** panel and click the **Communications** hyperlink to review recent communications to the member. Refer to [Compass - Viewing Communications (056371)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c0238ae3-ea9b-4da2-b9c9-90c8d4ad62a8). | |
| **3** | Navigate to the **Messaging Preferences** panel from either the Member Snapshot Landing Page or the Claims Landing Page. | |
| **4** | Verify contact information and that preferences are correct. | |
| **If the contact information and...** | **Then...** |
| Preferences are correct | [Warm transfer to the Senior Team (057524)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7653e7c2-1a97-42a0-8a81-6267c72e1ca9) and request to have an IT ticket created. |
| Or preferences are not correct | Update the information on the **Contact Info** screen. Refer to [Compass - Obtaining an Email Address and Managing Messaging Platform (MP) Notifications (054195)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=16d97031-aab3-4e30-b5d8-69ba322678d6). |
| **5** | Educate the member on self-service options via the web portal. | |

[Top of the Document](#_top)

|  |
| --- |
| Misdirected Calls/Messages (Member Asking to be Added to the Do Not Call List) |

If the caller is receiving misdirected calls from us and/or does not want to be called, create a Support Task, **Task Type:** Do Not Call. Refer to [Compass - Support Task Types and Uses List (058147)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6753488f-3996-45d9-88ba-257575369a98) for additional information.

 This is **not** the procedure for if the member wants to opt out of Messaging Platform alerts. For that process, refer to the [Do Not Contact (Member associated with Messaging Platform Client)](#_Available_Task_Types) section above.

[Top of the Document](#_top)

|  |
| --- |
| 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)

[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**