**Digital Outbound Call Campaign**

[Process](#_Toc204936785)

[Related Documents](#_Toc204936786)

**Description:** Process for making an outbound call when a member has received a quick registration link but is not registered.

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| Process |

Before making an outbound call, make sure your profile is set up to be able to access [Compass **-** Outbound Guided Caller Authentication (066775)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a386ced-5dc4-4139-a0b3-9ceffb2431c9). Refer to [theSource Profile Settings Reference Guide (002066)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=dddc310a-cb5d-4458-bc6e-50d0db27e3e2) as needed.

Before making an outbound call, make sure to:

* Review the Excel Document with targeted members.
* Pull up the member’s account in Compass:
  + Check to see if the member is already registered for Caremark.com (If so, do not call; move on to next member.).
  + Review any Alerts/High Priority comments.
  + Review the Member Recent Cases or Member Journey for recent calls and activity.
  + Ensure there is no PRU, Account Manager, or Case Coordinator recent activity.
    - If there is, do NOT place the call.

Perform the steps below:

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| **Step** | **Action** | | |
| **1** | Refer to [Compass **-** Outbound Guided Caller Authentication (066775)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a386ced-5dc4-4139-a0b3-9ceffb2431c9) for how to access the account and initiate the call, then proceed to step 2. | | |
| **2** | Greet the member.  Hello, this is <Your Name> with CVS Caremark on behalf of <Client Name>.Is <Full Member Name> available?   * If member confirms it is them on the phone, continue. * If caller confirms they are not the member, refer to [3rd party section in Step 3](#step3thirdparty).   **If there is documentation of previous attempt to register or reference to using Caremark.com during a previous call, acknowledge with the member and ask for additional information:** I’m following up on our previous interaction. We sent you a link to register on Caremark.com, but it appears that you are not yet registered. I would be happy to guide you through the registration process. OK?  **If the member seems uninterested in registering:** As a valued member, I want to make sure you’re aware of the self-service options available through Caremark.com for managing your prescription benefits, such as managing refills and pricing medications.  Do you have a few minutes to speak with me?   * If **yes**, continue to next step. * If **no**, ask when a good time would be to call back.   **If a VM is received on an outbound call, use the following scripting:**  “Hello, this message is for <Member Name>. This is <Your Name> calling from CVS Caremark. We noticed there may have been an attempt to register for Caremark.com that didn’t go through. We’d like to offer our support to ensure you’re able to access your account and take advantage of the helpful self-service features available on the site. Please give us a call at the toll free number on your prescription benefit card. We look forward to your call. Thank you, goodbye.”  Refer To [Compass **-** Outbound Guided Caller Authentication (066775)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a386ced-5dc4-4139-a0b3-9ceffb2431c9) for call dispositioning as needed and document the account in accordance with the outbound call campaign.  **VM Account Documentation:** “Outbound Call Made for Digital Enablement: Left Voicemail with the member. Instructed member to call us back using toll free number on card. If a member calls back please educate the member on self-service options offered by their plan (Caremark.com, mobile app), and update demographic information (address, phone number, messaging preferences). Offer to send registration link and, if member is able to register, walk through navigation of order status and refills , as outlined in the Source (Caremark.com – Common Member Assistance Call Types Index (TSRC-PROD-068985)” | | |
| **3** | In order to protect your privacy, can you please provide your zip code (or other possible authenticators). Refer to [Compass **-** Outbound Guided Caller Authentication (066775)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a386ced-5dc4-4139-a0b3-9ceffb2431c9) for authentication process.  Refer to the following as needed: | | |
| **If…** | **Then…** | |
| Speaking with someone who represents themselves as the member/beneficiary | Refer to the following: | |
| **If the member is…** | **Then…** |
| Hesitant to provide authentication information | * Restate your purpose and emphasize need to protect their privacy.   In order for us to discuss your <member need>, I must first verify your zip code to protect your privacy. |
| Refuses to provide authentication information | I completely understand! I will be leaving notes on your account, and you can call the number on your member ID card and any agent can help you.  Refer to [Compass **-** Outbound Guided Caller Authentication (066775)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a386ced-5dc4-4139-a0b3-9ceffb2431c9) for call dispositioning  Document the following: “Outbound Call Made for Digital Enablement: Spoke with member and they were not comfortable providing authentication. Instructed member to call us back using number on ID card to verify Caremark made the call. If member calls back, you as a CCR should confirm that we reached out and validate the call. Educate the member on self-service options offered by their plan (Caremark.com, mobile app), and update demographic information (address, phone number, messaging preferences).” |
| Speaking with 3rd Party  (Authenticated member/beneficiary must give verbal permission on the call to speak with a 3rd party.) | If you are speaking with a third party, and the **fully authenticated** member has given permission (over the phone) to discuss/share their medical/personal information and/or make changes with the third-party, you may treat the third-party caller as an authorized representative for **this call only**.  If member has not given permission or 3rd party is not a POA, inform them you will need to speak with the member regarding their account and provide the customer care phone number located in the plan’s CIF. | |
| **4** | Refer to [Compass **-** Outbound Guided Caller Authentication (066775)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a386ced-5dc4-4139-a0b3-9ceffb2431c9) for providing the Call Recording Disclaimer.   I need to let you know that this call is being recorded or monitored for quality purposes.  **CCR:** If caller requests that call not to be recorded, refer to [Inbound or Outbound Call - Quality Recording Disclaimer (024665).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=dee979fb-f11b-40de-9201-611f8095e3a8) | | |
| **5** | Using pre-call research, identify the purpose of your call.  I want to help overcome any challenges or hesitation you may have registering on Caremark.com.  Refer to [Caremark.com - Work Instruction/Job Aid Index (105672)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=8a2da44a-6336-454d-8deb-fca4a71ad69b) as needed.  **Note:** Refer to [Caremark.com – Web Error Reporting and Troubleshooting Guide (066155)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=8f4576f4-b866-4b64-beb0-c1089b3c32e8) to address the stated issue(s) the member encountered. | | |
| **6** | Recap the call with the member and go over what you have done for them today.  **Example:**  I’ve sent you a link to register your account on the website at Caremark.com and you are now registered. | | |
| **7** | Ensure the member does not have any other questions or issues before you release the call.  Do you have any other questions or concerns?   * If **yes**, answer any other questions or concerns. * If **no**, continue. | | |
| **8** | Close the call. Refer to [Close an Interaction or Research Case (050011)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0296717e-6df6-4184-b337-13abcd4b070b) as needed  I appreciate you taking the time to speak with me today. I hope you have a great day! | | |

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

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