**How to Engage the Caller While Chatting with the Senior Team**

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**Description:** Outlines strategies for managing downtime with specific techniques and resolving caller issues while engaged with Senior Team through chat.

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| Handling Downtime While Resolving Caller Issues |

When handling complex requests that require additional resolution time, **your goal is to keep the caller engaged without placing them on hold** or allowing awkward silence. Use these techniques to **guide the conversation smoothly** while maintaining a great customer experience.

**Quick Tips for Easy Multitasking:**

* Use Prewritten Talk Tracks
* Keep Engagement Short & Natural (don’t overload the caller)

**General Engagement Techniques (For Any Situation)**

Use these approaches to maintain engagement without disrupting the resolution process:

* **Set Expectations:** Icon - CalloutThis type of request takes a few minutes, but I’ll make sure everything is aligned before moving forward.
* **Micro-Checkpoints:** Icon - CalloutWhile we take care of this, let’s double-check something—do you prefer email or call reminders for updates?
* **Preemptive Guidance:** Icon - CalloutJust so you're aware, there are a few tools available that might save you time if you ever run into this again.
* **Offer Additional Value:** Icon - CalloutSince we’re working on this, I can quickly check if there are any other benefits available to you.

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| Specific Techniques for Procedural Requests |

**Procedural Requests** can include but are not limited to: Overrides, Offline Work, and System Access Issues.

**Use soft status updates (without mentioning SRT):**

Icon - CalloutThis process takes a few minutes, but I’m getting it sorted.

Icon - CalloutI'm working with my team now to process this for you. These typically take about X minutes, but I’ll keep you posted.

Icon - CalloutI’m working through the best way to get this resolved for you, and it may take a few moments. While I work through it, I want to make sure you have all the details you need.

Icon - CalloutThis type of request takes a few minutes, but I’ll make sure we get everything aligned before moving forward.

**Offer proactive account checks**: Refer to Proactive Account Checklist section below for more information

Since we’re here, let’s make sure everything else is in good shape for you.



Since we’re waiting, I can also check if there are any other benefits available to you. Would that be helpful?



Since we’re handling this, something I want to highlight for you is…



While we complete this process, I can double-check your account to make sure everything else looks good.



**Educate on related self-service tools:**

Did you know you can request this online next time?



There are a few tools available that might save you time in the future. Would you like me to go over them briefly?



I just reviewed a few details on your account, and it looks like you might be eligible for [insert benefit or service]. Would you like me to check into that for you?



I’m working through this now—while I do that, would you like me to walk you through a helpful tool that might make things easier for you?



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| Specific Techniques for General Assists |

**General Assists** can include but are not limited to: Complex Cases and Unique Situations.

**Offer reassurance:**

Icon - Callout I want to make sure we get this right, so I’m double-checking everything for accuracy.

Icon - Callout I want to make sure we get this right for you. My team is reviewing the details now.

Icon - Callout This is one of those situations where I want to make sure we cover all the bases before confirming next steps. I appreciate your patience while I get everything aligned.

**Confirm additional details:**

Icon - Callout Let’s review the key information to ensure a smooth resolution.

Icon - Callout While we wait, let’s make sure I captured everything correctly. Can you confirm this information?

Icon - Callout While we work through this, let’s make sure we have everything in place: could you confirm this piece for me?

**Address next steps:**

Icon - Callout If this situation ever comes up again, here’s how to handle it faster.

Icon - Callout This is a bit of an unusual case, but if something similar happens again, here's how you can handle it faster.

Icon - Callout This situation is one that some members run into from time to time: do you want me to walk you through how to handle it more easily in the future?

If this happens again, here’s how to make the process smoother.



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| Specific Techniques for Job Knowledge Assists |

**Job Knowledge Assists** are when additional guidance is needed.

**Frame it as an exploration process instead of uncertainty:**

Icon - Callout I want to navigate this correctly for you—here’s what we’ll do.

Icon - Callout This is a unique situation, so I want to make sure we navigate it correctly. Here’s what we’ll do…

**Engage with additional support while waiting:**

Icon - Callout Since we’re handling this, anything else I can assist with today?

Icon - Callout While I look into this, I can answer any other general questions you might have.

Icon - Callout Since we’re working through this, I can take a moment to highlight a few things that might be helpful to you.

We’re making progress on this, and I also want to check: is there anything else on your account you’d like me to take care of today?



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| Proactive Account Checklist |

Check each of the items listed below to ensure the member will not have to make a return call.

On third party calls (spouse, family member, friend), review the account and inform the caller if and when an issue is discovered to have the member contact Customer Care to discuss important information on their account. **Exceptions:**

* Pharmacies, Prescribers, Medical Institutions, etc.
* Closed accounts (death of a member, no longer active)
* Plan has not yet started (beginning plan different month)
* Member hangs up before complete (notate the account)

**Verification:** To ensure that contact information is up to date. It may eliminate issues with missed invoices, medications sent to the wrong address, not receiving order notifications in regard to their order, and more.

* Verify the address on Compass
* Verify phone number on Compass
* Verify email address on Compass
* Ask for cell and email and proactively enroll in messaging alerts
* View Past 12 Month Communication

**Account Review:** There may be instances that we have made outbound calls to try to get ahold of the member, there may be information pertinent to an order, has the member called and filed a grievance the same day? Is a Support Task asking for additional information or can we give the status on a Support Task to avoid a call back?

* Viewing Member’s Recent Cases by accessing Case Details Landing Page, navigate to the **Member’s Recent Cases** panel and click **View All**. Click the appropriate **Case** hyperlink. From the **Case Comments** panel, click **View All**.
* Any mail order issues?

**Order Placement - Auto Refill / Auto Renewal:** To ensure that the member keeps up with their therapy without interruptions, to ensure they do not miss any refills that may be available, and to eliminate callbacks to place an order that was available when they spoke to you.

* Prescriptions available for refill?
* Any expired prescriptions?
* Any duplicate prescriptions?
* Prescriptions that have only one refill or have no refills remaining?

**Order Status:** Orders that are processing: confirm medication, strength, quantity, and form; confirm total cost of order (pricing disclaimer). If cancelled or on-hold, correct the issue so the order will continue to process and ship.

* Navigate to the Claims Landing Page, then click the **Mail Order History** tab and check all open orders.

**Transaction History / Maintain Payment Options:** Educate the member of any balance that’s owed so that they can pay it on the same call if they wish, this can sometimes cause delays in the member’s mail orders. This will help to eliminate call backs.

* A mail order balance?
* Any orders that are on hold or delayed?
* A form of payment on file?
* A form of auto payment on file?

**Plan Benefit Override /** **View PA Status:** PA’s allow for the member’s prescriptions to be filled by the plan, so it is important to educate the member of their expirations to ensure that there is no interruption in their therapy. It also minimizes the number of times the member has to call. If an RX denies because of an expired PA, the member will call back. Let’s take care of it while the member is on the phone.

* Any Prior Authorizations that will soon expire? (in the next 60 days/two months)
* Prior Authorizations that have expired/have not been renewed?
* Has the beneficiary been educated on their expiring PA(s)?

**Account Balance:** For Medicare members only, take the opportunity to educate the member on the phase of the plan they are in so that they better understand their costs. This is to avoid the member calling back to learn why the cost increased. If in the middle of a deductible phase, no need to mention.

* Met their deductible and/or drug spend (if applicable)?

**Communication History / Caremark.com:** We can use this to check and make sure the member is receiving their communications appropriately, and to make sure they didn’t miss any alerts that need attention.

* Ask for cell and email and proactively enroll in messaging alerts
* Any recent letters and/or calls to the member?
* Educate the member on the benefits of using Caremark.com
* Offer to send a link to member to register for Caremark.com via email or text message

**Coordination of Benefits:** By checking for other coverage, we could eliminate other calls, the member may have expired coverage still showing or need to add new coverage

* Does the member have any other coverage?

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| Related Documents |

[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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