# No Starter/Step Up Doses Outbound Calls

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**Description:**  Describes the process when making outbound calls to support the No Starter/Step Up Doses mail order changes initiative.

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| Member Proactive Notifications |

Members who have filled a starter dose or have titration doses of medication at mail will receive a written letter informing them of the change. These letters will not be visible in communication history in Compass. There is an attached letter for reference below.

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| Outbound Process |

**Some key attributes to a successful call include:**

* Be Prepared: Do the necessary research before placing the call.
* Be confident.
* Actively listen.
* Be empathetic to the members’ concerns. You may receive pushback when attempting to authenticate an outbound call. Refer to member is hesitant to provide authentication information.

**If Member Does Not Answer:** Leave a voicemail and document the account.

**Before making an outbound call, make sure you are:**

* Using the Campaign Manager Tool to access your call list.
* In the correct outbound state in Five-9
* In the member’s account in Compass:
  + Review any Stop-See/High Priority comments.
  + Review the View Activity page for recent calls and activity.
  + Ensure there is no SRU, 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** | **Complete pre-call Research:**   * Locate the impacted medication in the member’s account. If the medication is on Auto Refill or Auto Renewal, the medication **MUST BE REMOVED** from both programs. This step must take place regardless of whether we call the member or not.   **Note:** If you remove a medication from Auto Refill/Renewal and you contact the member, advise them a letter will be sent due to disenrollment. Ensure the member no action is needed.  **Do NOT call member if:**   * Medication has already been transferred to retail pharmacy. * Member has already called customer care addressing the mail order change letter they received. * There is recent activity by SRU, Account Manager, or Case Coordinator.   Refer to [Required Documentation](#_Required_Documentation). | |
| **2** | **Provide Greeting:**  Hello, this is <AGENT NAME> with CVS Caremark Mail Order Pharmacy. Is <FULL MEMBER NAME> available?   * If member confirms it is them on the phone, continue.   As a valued member, I am reaching out to make you aware of changes to the availability for some of your mail order medications. Do you have a few minutes to speak with me?   * If yes, continue to next step. * If no, ask when a suitable time would be to call back. | |
| **3** | **Provide 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). | |
| **4** | [**Authenticate (004568)**](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bcb8da72-5501-4631-b9fd-fe675bc4a1fd) **the caller :**  To fully authenticate an outbound call, you need three (3) authenticators:   * The full name of the member: This is collected in the greeting when you ask to speak with the member, and they confirm it is them on the call. * Member’s phone number: This is confirmed when you call the number we have on record. * One additional authenticator is required:   + zip code   + street name (not full address)   + year of birth (not full DOB)   + day/month of birth (not full DOB) | |
| **If speaking with…** | **Then…** |
| Someone who represents themselves as the member/beneficiary | Ask for one additional piece of information to complete authentication:  To protect your privacy, can you please provide your <zip code or another possible additional authenticator mentioned above>.  **Note:** First and last name of the person we need to contact is captured during your greeting, and Member’s full phone number is confirmed by dialing the number on file or in the campaign file. Do not ask for these authenticators again.  **CCR Process Note:** If the person answering the phone says, "This is" or "Wait", and the person comes to the phone, AND they can provide the required authentication elements, we can take the person’s word they are the person.  **If member is hesitant to provide authentication information:**   * Restate your purpose and emphasize need to protect their privacy. * Mention previous member call date if applicable.   + If member is still not comfortable, leave a note on member account and offer for member to call back using phone number on the back of ID card. Refer to [Required Documentation](#_Required_Documentation).   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. |
| 3rd Party  (Authenticated member/beneficiary must give verbal permission on the outbound call to speak with a 3rd party.)  **CCR Note:** Inform member we will require a POA or authorization form on file to speak with 3rd party on future calls. | 1. Ask for first and last name of the person we need to contact.  2. Advise the 3rd party we would need to speak with the member, complete authentication, and gain verbal permission to speak with them.   * If 3rd Party agrees to get the member on the line or indicates POA is on file, follow steps 1-3 above to complete authentication with the member/POA.   **Note:** For non POA, gain verbal approval to speak with the 3rd party.   * If 3rd party advises the member is not present or unable to come to the phone, check to see if there is a better time to call.   + If yes, advise the 3rd party you will set the member up for another call.   + If no, advise the 3rd party you will document the member’s account, and they can contact the customer service number on the back of their ID card. |
| **5** | **Educate Member on Starter Dose/Step Up Dose Mail Order Changes:**  We are reaching out to inform you that <name of medication> will no longer be available through mail order due to this/these medication(s) requiring monitoring and dosage changes for some patients that may be better managed through retail pharmacies. But don’t worry, you can still fill this medication at any in-network retail pharmacy. We encourage you to work closely with your doctor to monitor your progress with this medication. If your medication is later prescribed as a maintenance medication, it will then be eligible for mail order fulfillment.  **Do NOT** proactively offer to transfer the prescription to a retail pharmacy.  **DO** Educate the member on:   * The use of Caremark.com and the mobile app to locate in-network retail pharmacies. * Also, advise the member of the ability to check drug cost and coverage for any alternative therapies the doctor may recommend. * The member can contact the pharmacy to see if medication is available and the pharmacy can help them transfer the prescription. * Speak with their doctor about options to manage their condition and/or have a new prescription for current medication be sent to an in-network retail pharmacy.   If member request/asks you to transfer the prescription to a retail pharmacy, have them reach out to the in-network pharmacy of their choice to initiate the transfer.  You will need to contact the in-network pharmacy of your choice to ensure they have the medication in stock. The pharmacy will be able to initiate the prescription transfer for you. | |
| **6** | **Close the Call:**  Recap the call with the member and go over what you have done for them today, if any actions were taken.  <Member Name >, we transferred your prescription for <RX NAME & DOSAGE> to the <name of retail pharmacy>.  I have sent you a link to register your account on the website at Caremark.com so you can check drug cost and coverage after speaking with your doctor.  **CCR:** Ensure that the member does not have any other questions or issues before you release the call.  Do you have any other questions I may be able to help you with today?   * If yes, answer any other questions or concerns. * If no, continue closing the call.   I appreciate you taking the time to speak with me today. I hope you have a wonderful day! | |

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| Voicemail |

**If Member Does Not Answer and Voicemail is Available: ** This message is for <member’s full name>. My name is <agent’s first name> with CVS Caremark **Mail Order Pharmacy**, and I am calling with an important change regarding a medication you are filling at mail order. A letter was sent prior to our phone call today, and we want to ensure you understand your options moving forward. Please visit us at Caremark.com or talk to your doctor about options to manage your condition, such as alternative therapies and receiving a new script for an in-network retail pharmacy. Thank you and have a good day.

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| Required Documentation |

Refer to the table below:

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| **Scenario** | **Documentation** |
| Spoke with Member and Educated on Change | Outbound Call Made for Mail Order Change: Spoke with member about <name of their medication> no longer being available through mail order.  Include: Any actions you took (**Example:** Transferring prescription to retail pharmacy, instructing member to speak with their doctor for new prescription at retail) and any other topics or actions taken on the call while speaking with the member. |
| Spoke with Member and They Did not Authenticate | Outbound Call Made for Mail Order Change: Spoke with member and they were not comfortable providing authentication. Instructed member to call us back using number on ID card to verify Caremark Mail Order Pharmacy made the call. If member calls back, you as a CCR should confirm that we reached out and validate the call. Please inform member that their <name of medication they were having filled through mail order> will no longer be available through mail order due to this/these medication(s) require monitoring and dose changes for some patients that may be better managed through retail pharmacies. Inform the member they can receive their medication at an in-network retail pharmacy. Members received a letter prior to this call to discuss this change and it is available to view in Communication History. |
| Did Not Speak with Member and Left Voicemail | Outbound Call Made for Mail Order Change: Did not speak to member and left voicemail educating member that one of their medications will no longer be available through mail order. If member calls back, you as a CCR should confirm that we reached out and validate the call. Please inform member that their <name of medication they were having filled through mail order> will no longer be available through mail order due to this/these medication(s) require monitoring and dose changes for some patients that may be better managed through retail pharmacies. Inform the member they can receive their medication at an in-network retail pharmacy. Members received a letter prior to this call to discuss this change and it is available to view in Communication History. |
| Spoke with 3rd part who was unable to authenticate/Member was not available at time of call. | Outbound Call Made for Mail Order Change: I spoke with a 3rd party (who was unable to authenticate or indicated member was not available) and advised them the member can contact the number on the back of their ID card for more information. If member calls back, you as a CCR should confirm that we reached out and validate the call. Please inform member that their <name of medication they were having filled through mail order> will no longer be available through mail order due to this/these medication(s) require monitoring and dose changes for some patients that may be better managed through retail pharmacies. Inform the member they can receive their medication at an in-network retail pharmacy. Members received a letter prior to this call to discuss this change and it is available to view in Communication History. |
| Did Not Call Member | Researched Account for Mail Order Change and Did Not Call Member: Did not call member due <enter reason you did not call (**Example:** Medication has been transferred to retail)>. Ensured prescription was removed from auto refill and renewal. |

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| Frequently Asked Questions (FAQs) |

Refer to the table below:

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| **#** | **Question** | **Answer** |
| **1** | What is the effective date of this change? | April 17, 2025. |
| **2** | Why are you making this change? | We are making this change because some medications, like starter or titration doses, require close monitoring and dose adjustments. These are often better managed at retail pharmacies where doctors and pharmacists can provide more immediate support and guidance. This helps ensure that patients receive the best possible care and outcomes with their medications. |
| **3** | Are other medications still available at mail order? | Yes, we will continue to dispense maintenance medications through mail order. |
| **4** | Is this change permanent? | Yes, this change is permanent. We are making this adjustment because some medications, especially those that require monitoring and dose adjustments, are better managed at retail pharmacies. This allows our members to receive more immediate support and guidance, ensuring the best possible care and outcomes with their medications. |
| **5** | When do we expect members to receive notifications via mail? | Proactive communication to members will start to be mailed on 3/20/2025. The effective date for this change is April 17, 2025. |
| **6** | Where can members fill their prescriptions for these drugs after the changes take effect? | Starting April 17, 2025, members can fill prescriptions for these medications at any participating in-network retail pharmacy **with available supply**. |
| **7** | What happens if a new prescription is sent to CVS Caremark’s Mail Service Pharmacy? | New prescriptions will be rejected prior to processing, and prescribers will be notified that the prescription must be sent to another pharmacy. |
| **8** | Can you check to see if my local retail CVS/Non-CVS has the medication in stock? | We are not able to accurately determine retail stock on hand. Should the prescriber choose to write an Rx for a retail pharmacy, the prescriber or member may call the in-network pharmacy of choice. |
| **9** | If a member was shipped a medication prior to April 7th but calls Customer Care on or after April 7th and needs a reship, can the medication be reshipped? | No, the mail service pharmacy will be unable to reship. Customer Care Representatives will need to submit a Manual Reship Support Task/RM Task (Do not use automation.) The member’s claim will be reversed, and the member will be issued a full or partial copay/coinsurance refund depending on the reship type. |

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| Proactive “Sample” Member Communication |

Refer to [No Starter/Step Up Doses Proactive “Sample” Member Communication (074250)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6a8ba02d-026e-4884-b527-0de62bc34824).

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| Related Documents |

[Customer Care Abbreviations and Definitions and Terms Index (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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