

## **Attachment 4: PBM Call Audit Expectations**

1. Prior to the implementation of the call audits, Vendor shall provide the Plan with a copy of its customer service professionals' call process(s) and quality guidelines that will be reviewed and used as a part of the Plan's audit procedure.
2. Vendor shall send a randomly selected call sample of twenty-five (25) Member calls related to non-specialty prescriptions and ten (10) Member calls related to specialty medications to the Plan no later than the 7<sup>th</sup> day of the month following the month of the calls. The call sample shall include calls from various dates throughout the month.

For example, for November calls, Vendor shall send the call sample to the Plan for review by the 7<sup>th</sup> of December. See the sample schedule below:

### **7th of Month:**

Call sample received by the Plan from Vendor.

### **15th of Month:**

The latest date (by close of business) that the Quality Specialist will present Vendor with the results of the call audit.

### **20th of Month:**

The latest date (by close of business) that Vendor shall respond to the call audit results.

### **End of the Month:**

The Plan and Vendor will hold a monthly meeting to discuss any outstanding issues following the receipt of the call audit responses from Vendor.

If Vendor is unable to adhere to this specific timeline in whole, or in part, Vendor shall provide the Plan with an alternative timeline that is similar in structure to the timeframe provided by the Plan prior to the implementation of the call audits. For example, Vendor will allow a week for the Plan to review the calls, a week for Vendor to review the audit results, and two weeks to calibrate an end of month meeting. If a change needs to occur following implementation, Vendor shall notify the Plan as soon as Vendor is aware of any situation that may require a change in the agreed upon schedule.

3. Vendor shall ensure that instructions on how to access the call sample are clearly communicated to the Quality Program Management staff prior to sending the call sample. This includes, but is not limited to, associated passwords and program software needed to access the call sample.
4. Call service expectations: The Plan would like Members to not only have a pleasant experience when interacting with Plan Vendors, but also to receive accurate and helpful information.

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Below are three (3) criteria that shall serve as the minimal expectation for each call:

- ❖ Vendor's name as well as the customer service professional's name shall be a part of the call greeting, if is not already part of Vendor's call handling requirements.
- ❖ The Member's requests/reason for calling shall be summarized prior to the closing of the call.
- ❖ The customer service professional shall ask the Member, "Is there anything else that I can assist you with" during the closing of and prior to ending the call.

Call accuracy expectations: The Plan would expect the Customer Service representative to provide accurate information about all aspects of the call including information about other Plan vendors and Plan specific benefit