



CENTER FOR BENEFICIARY CHOICES

MEMORANDUM

DATE: November 9, 2006

To: All Part D Plan Sponsors

From: Cynthia Tudor, Ph.D., Director, Medicare Drug Benefit Group

Subject: New Contract for Call Center Performance Measurements

At the November 1, 2006 Part D Operational User Group Call, CMS introduced Research Triangle Institute (RTI) International as the new contract that will be collecting and analyzing call center surveillance data for 2007. RTI began in 1958 as a contract research organization and is headquartered in Research Triangle Park, North Carolina.

The RTI period of performance began in October 2006 and will continue through December 2007. During this time-period, they will:

1. conduct a pilot test to refine the survey methodology
2. monitor all phone lines for both pharmacy support and beneficiary customer service call centers for four quarters, four weeks each quarter
3. analyze the call center data for each quarter

Recently, RTI began conducting test calls in preparation for the call center pilot that will be conducted in late November 2006. The pilot will consist of, 1000 calls to 60 beneficiary centers and 30 pharmacy centers. The actual surveillance calls will begin in early 2007. During this time all beneficiary and pharmacy call center phone numbers will be called. Calls will be randomly made between Monday and Friday during the hours of operation:

- Beneficiary customer support numbers will be called 8:00 am to 8:00 pm during open enrollment, and 8:00 am to 6:00 pm outside of open enrollment.
- Pharmacy support numbers will be called 8:00 am to midnight.
- The call day will be divided into two-hour time blocks, and the number of calls will be uniformly distributed across the blocks.

Live telephone interviewers will use a Computer based CATI (Computer Assisted Telephone Interviewing) system to guide them through calls and to measure date/time stamps at the following points:

- Time of Dial
- Time of Answer
- Time in IVR/ACD
- Time in Hold
- Time when we get a live customer service representative (CSR)

Approximately 10% of calls made by the telephone interviewers will be monitored by supervisors. RTI will also validate the called numbers against daily RTI phone records and the monthly phone records from their phone service.

In addition, a small group of the plans that participate in the pilot study will be asked to assist RTI validate the results of the pilot. These plans will be identified based on their willingness to share their call center data during the pilot's time period. RTI will compare the plans' call center statistics with the findings of the pilot study.

RTI plans to create a navigation path of the IVR/ACD to be as generic as possible to reach a CSR. They will record IVR options selected during a call (i.e. key presses to navigate the IVR/ACD). In addition, the RTI monitoring will be different from the previous surveillance efforts. There will be no scenarios/questions asked of the CSR. RTI will only collect data on the time it takes to reach a live CSR. Once that person has been reached, RTI will conclude the survey and record the data.

RTI and CMS are soliciting any suggestions, comments, or feedback from Part D plans regarding the proposed methodology on the call center monitoring. Specifically, they would like to request comments on the following:

- Will calls with their area code, 919, be filtered or blocked out from any call center?
- Will the path through the IVR/ACD have a significant effect on what hold queue (and its wait time) one gets placed in?
- Is there a generic way to navigate the IVR/ACD that will be effective across call centers?

We ask that Part D sponsors to please send feedback/comments/suggestions (but no questions should be sent) to: PartDmetrics@cms.hhs.gov and put "RTI" in the subject line.

CMS appreciates your participation and efforts in making the Medicare prescription drug benefit a success.