*How to Send a Document to Fulfillment*

# Segment:

| ☐ All Segments | ☐ – All  ☐ Home  ☐ Host | ☐ Commercial All  ☐ Commercial (Local)  ☐ BPO All  ☐ BPO Provider  ☐ BPO Member  ☐ PCP Coordinated Care Plans | ☐ Government – All  ☐ Medicare Advantage  ☒ Medicare Supplement  ☐ Medicaid | ☐ Individual  ☐ Individual ACA  ☐ Individual non-ACA |
| --- | --- | --- | --- | --- |

# Purpose

The purpose of this document is to submit documents to fulfillment correctly.

# Procedure:

1. The Cover letter

| **Step** | **Action** |
| --- | --- |
| **1** | **Follow** the suited **process** when a document goes to fulfillment. |
| **2** | Complete the following:   1. **Open** the document called “**Remote User Business Continuity Cover Page**.” 2. Fill out the following:    * **Cost Center**: 0298    * **Requestor**: Name of the sender (Your name)    * **Date Submitted**: Current date    * **Total number of Pages** (Including Cover Page and address insert):      1. *Cover Page*      2. *Address Insert*      3. *Member’s letter*    * **Description of Document**: This is the name of the letter. 3. **Go** to [The Address Insert](#3znysh7) Section. |

2. The Address Insert

| **Step** | **Action** |
| --- | --- |
| **1** | **Find** the **Address Insert** in the “**Remote User Business Continuity Cover Page**” document. |
| **2** | Complete the following:   1. **Locate** the **second page** of the Cover Letter.    * **Click** the “**Tab**” button on your *keyboard*. (**NOTE**: Your text cursor will be on the second line of the second page of the Address Insert Page.) 2. **Insert** the member’s **mailing address**. 3. **Ensure** **no punctuation** or **color** is on the Cover Letter and Address Insert **before saving**. 4. **Click** on “**File**.” 5. **Select** “**Save as**.” 6. File name should be as follows:    * **Cost Center - 0298**    * **Members ID – ID#**    * **Number of pages of the letter you intend to send. - 1**    * **Your first initial and last name – Your Example** 7. **Choose** “**PDF**” as the **File Type**. (**Example**: 0298-ID#-1-YExample.PDF) 8. **Save** the **completed letter** in the [Medsup](about:blank) folder in the “I” drive. 9. **Go** to [Member Letter](#tyjcwt) Section. |

3. Member Letter

| **Step** | **Action** |
| --- | --- |
| **1** | Find the applicable letter you are sending the member. |
| **2** | Complete the following:   1. **Verify** that the **letter** you are sending the member **is complete**. 2. **Click** on “**File**.” 3. **Select** “**Save as**.” 4. File name should be as follows:    * **Cost Center - 0298**    * **Members ID – ID#**    * **Number of pages of the letter you intend to send. - 1**    * **Your first initial and last name – (Your Example = YExample)** 5. **Choose** “**PDF**” as the **File Type**. (**Example**: 0298-ID#-1-YExample.PDF) 6. **Save** the **completed letter** in the [Medsup](about:blank) folder in the “I” drive. 7. **Open** the **File Explorer**. (**NOTE**: This can be found in the Microsoft Start Menu) 8. **Relocate** the Member’s **letter** in the [Medsup](about:blank) folder in the “I” drive. 9. **Edit** the **file name**. 10. **Remove** the “**.PDF**” at the end of the file name. (**NOTE**: Be sure to look at the time of the modified file to make sure you are editing the correct file.) 11. **Go** to [Sending the Letter to Fulfillment](#1t3h5sf) section. |

4. Sending the Letter to Fulfillment

| **Step** | **Action** |
| --- | --- |
| **1** | **Open** the **Cover Letter** saved in the [Medsup](about:blank) folder in the “I” drive. |
| **2** | Complete the following:   1. **Click** “**Tools**” in the top menu ribbon. 2. **Select** “**Add**” under Organize pages. 3. **Select** “**My Computer**” once the secondary window opens. 4. Add the following:    * **Cover Letter as *page 1***    * **Address Insert as *page 2***    * **Member Letter associated with the Cover Letter as *page 3 or more*** 5. **Verify** the Member **letter** page(s) are in order. 6. **Select** “**Save**” in the top right. 7. **Move** the **document** to the P&F Business Continuity folder in the “I” drive. (**NOTE**: When the P&F Business Continuity folder is empty, or the current file is missing. That means Fulfillment has printed and sent the letter to the member.) |

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# References:

* Glossary of Acronyms & Terms
* Medsup
* P&F Business Continuity

# Revision History:

| **Version** | **Revision Date** | **Revision Description** | **Authored By** | **SME Name** | **SME Approval Date** | **Management Name** | **Management Approval Date** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **1.0** | 03/07/2023 | Initial document creation | Lawrence Velasquez | Erika P | 03/07/2023 | Erika P | 03/07/2023 |
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# Job Aid ID: KBXXXXXXX