

Job Aid for Intake Specialists, Care Navigators & Patient Navigators for Brand Transfers & Inquiries for Patient Support Center

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1. PURPOSE AND SCOPE

This document is for the Patient Support Center (PSC) Intake Specialist, Care Navigator and Patient Navigator team. The Job Aid has been created for the Intake Specialists, Care Navigators and Patient Navigators if they should receive inbound document(s) and/or phone call(s) regarding other PSC company products, non-PSC company products and/or non-company products.

2. TRAINING

In addition to the roles listed below, this Job Aid is applicable for all brands that are onboarded to the PSC.

NPS Role
Drug A Care Navigator
Drug B Intake Specialist
Drug B Care Navigator
Drug C Patient Navigator
Therapy Patient Navigator
Performance Excellence Analyst

3. PSC COMPANY BRANDS

PSC COMPANY Brands: (as of January '24)	
Brand (generic):	Contact Information:
Drug A	• Phone Number: 1-XXX-XXX-XXXX
Drug B	• Phone Number: 1-XXX-XXX-XXXX
Drug C	• Phone Number: 1-XXX-XXX-XXXX
Therapies	• Phone Number: 1-XXX-XXX-XXXX



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3.1 PROCESS GUIDANCE FOR OTHER PSC BRANDS

IF	THEN
<ul style="list-style-type: none"> Inbound Document is received for another PSC brand 	<ul style="list-style-type: none"> The document should be re-assigned to the appropriate brand for the appropriate team to process
<ul style="list-style-type: none"> Phone Call is received for another PSC brand 	<ul style="list-style-type: none"> For calls received in regards to other PSC brands, the calls should be warm transferred to the appropriate brand

4. REPORTING ADVERSE EVENTS FOR OTHER COMPANY BRANDS (PSC & NON-PSC)

Sample Scenarios (Drug A & Drug B used as examples):	
Reminder: When reporting an Adverse Event (AE), the agent should always document, in the AE report, verbatim (as much as possible) exactly what the caller states	
IF	THEN
<ul style="list-style-type: none"> A call was made in error to Drug A, and the patient is on Drug B 	<ul style="list-style-type: none"> Agent would need to clarify if the patient is potentially on both Drug A and Drug B or if the call was truly made in error
<ul style="list-style-type: none"> A patient is taking Drug A and Drug B, but the call was made to Drug A 	<ul style="list-style-type: none"> The agent would report the AE using the Drug A POPID with Drug B listed as a co-suspect within the AE report <ul style="list-style-type: none"> The Drug A agent would not need to transfer the caller to Drug B, unless they also requested to talk to a Drug B agent
<ul style="list-style-type: none"> A patient calls Drug A, reports an AE, but the agent confirmed the patient is only taking Drug B 	<ul style="list-style-type: none"> The Drug A agent would report the AE, but would NOT use the Drug A POPID, it would be a spontaneous AE <ul style="list-style-type: none"> The Drug A agent should ensure they indicate the "POPID is unknown" in the AE report As a best practice for Company PSC brands, the Drug A agent would warm transfer the caller to Drug B <ul style="list-style-type: none"> The Drug A agent would share the PVI# and the adverse event with the Drug B agent The Drug B agent would also report the AE using the Drug B POPID <ul style="list-style-type: none"> Additionally, if the caller mentions an AE that was NOT disclosed/reported to the Drug A agent, the Drug B agent would need to include it in the AE report
<ul style="list-style-type: none"> A patient is on more than one company product 	<ul style="list-style-type: none"> It is NOT an automatic reportable AE to be on more than one company product. It would be considered a reportable AE, if in addition to being on multiple company products, they disclosed patient harm or other events described as an AE in company training

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5. PROCESS GUIDANCE FOR INBOUND DOCUMENTS

Scenario: Inbound Document(s) received for Non-Company brand	
STEP	PROCESS
During Pre-Intake	<ul style="list-style-type: none"> Index without any patient information
During Intake	<ul style="list-style-type: none"> When searching for duplicates, populate one letter in the last name field and check the “No Patient Found” box The only information that should be entered as part of intake are: ¹Patient’s Initials (i.e., S.F.) ²HCP Information
Inbound Parent Case	<ul style="list-style-type: none"> Send only the HIPAA coversheet fax to the HCP and in the comments section include the following: <ul style="list-style-type: none"> “Please note that a fax was sent to the incorrect location at [Date & Time] for [Patient Initials].” <ul style="list-style-type: none"> No additional patient or HCP information should be included in the comments and the documents received should NOT be attached/included
Anonymizing the Record	<ul style="list-style-type: none"> Once the fax is sent and has a status of “Delivered”, the agent closes any open cases, and anonymizes the patient record Create a SNOW ticket for TT Ops to delete the document in the S3 bucket [Refer to WI-072]

Scenario: Inbound Document(s) received for other Company brand (Non-PSC)	
STEP	PROCESS
During Pre-Intake	<ul style="list-style-type: none"> Index without any patient information
During Intake	<ul style="list-style-type: none"> When searching for duplicates, populate one letter in the last name field and check the “No Patient Found” box The only information that should be entered as part of intake are: ¹Patient’s Initials (i.e., S.F.) ²HCP Information
Inbound Parent Case	<ul style="list-style-type: none"> Send the HIPAA coversheet fax and the document(s) received to the other company brand and in the comments section include the following: When generating the fax, include the following in the comments section: <ul style="list-style-type: none"> “Please note that a fax was sent to the incorrect location, forwarding the documents to the appropriate team.”

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	<ul style="list-style-type: none"> No additional patient or HCP information should be included in the comments
Anonymizing the Record	<ul style="list-style-type: none"> Once the fax is sent and has a status of "Delivered", the agent closes the case any open cases, and anonymizes the patient record Create a SNOW ticket for TT Ops to delete the document in the S3 bucket [Refer to WI-072]

6. PROCESS GUIDANCE FOR INBOUND CALLS

Scenario: Inbound Call received for Non-Company brand		
STEP	PROCESS	
1	Confirm caller intent	
	IF	THEN
<ul style="list-style-type: none"> Prior to a record being created in Salesforce, caller states they are calling in regards to a Non-Company brand 		<ul style="list-style-type: none"> The agent should enter "Anonymous Anonymous" for the first and last name (no additional information should be collected/documented) Refer the caller back to their HCP or pharmacy to provide correct contact information for the non-company brand <ul style="list-style-type: none"> If any patient/caregiver information was collected, anonymize the record Sample Comment: <i>"IBC in regards to a Non-company medication, referred the caller back to their HCP/pharmacy."</i>
<ul style="list-style-type: none"> After a record is created in Salesforce, caller states they are calling in regards to a Non-Company brand 		<ul style="list-style-type: none"> Refer the caller back to their HCP or pharmacy to provide correct contact information for the non-company brand Once the call is complete, the agent should document the reason for the call in the case comments and note that the record will be anonymized <ul style="list-style-type: none"> Sample Comment: <i>"IBC in regards to a Non-comapny medication, referred the caller back to their HCP/pharmacy and anonymized the record"</i> Anonymize the record in Salesforce



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Scenario: Inbound Call received for other Company brand (Non-PSC)		
STEP	PROCESS	
1	Confirm caller intent	
	IF	THEN
	<ul style="list-style-type: none"> • Prior to a record being created in Salesforce, the caller states they are calling in regards to a Non-PSC company brand 	<ul style="list-style-type: none"> • The agent should enter “Anonymous Anonymous” for the first and last name (no additional information should be collected/documented) • If we have the brand’s phone number, provide it and offer to cold transfer • If we do NOT have the brand’s phone number, clarify if the caller is looking for a specific department (i.e., CIC, MIC or NPAF). If caller is unsure, offer to provide the CIC phone number and warm transfer • If for any reason, patient/caregiver information was collected, anonymize the record • Sample Comment: <i>“IBC in regards to a Non-company medication, referred the caller back to their HCP/pharmacy.”</i>
	<ul style="list-style-type: none"> • After a record is created in Salesforce, the caller states they are calling in regards to a Non-PSC company brand 	<ul style="list-style-type: none"> • Provide the phone number for the other company brand and offer to cold transfer • Once the call is complete, the agent should document the reason for the call in the case comments and note that the record will be anonymized <ul style="list-style-type: none"> ○ Sample Comment: <i>“IBC in regards to a Non-company medication, referred the caller back to their HCP/pharmacy and anonymized the record”</i> • Anonymize the record in Salesforce



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7. REFERENCE & RELATED DOCUMENTS

The below list is accurate as of the approval of this document, please refer to the WPD repository for all current documents

Document #	Name
JA-005	Data Intake for Drug B
JA-033	Data Intake for RLT
JA-043	Drug C Data Intake & Missing Information
JA-051	Pre-Intake for Drug B
WI-001	Intake for Drug B
WI-018	Caller Lookup & Customer Record Creation
WI-028	Reporting a PAE/PTC
WI-072	Pre-Intake
WI-075	Intake for Therapies
WI-088	Intake for Drug C
WPD-PSS-CEC-001	Potential Adverse Event, Special Scenarios and Technical Complaint

