# MED D - SSI PDP - Broker Support for Agents

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**Description:** This document provides guidance on what changes and/or updates an Agent can make on behalf of the beneficiary.

**Target Audience:** SilverScript PDP

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| Authentication of Agent |

Agent or Authorized Office Staff may call to request changes/updates to a beneficiary’s account. Full authentication is required by the Agent or Authorized Office Staff member.

**Example Introduction of Authorized Office Staff:** Hi my name is Ally and I am calling on behalf of Mr. Member and I need to order a replacement ID card. Can you help me?

The Agent will need to provide the Customer Care Representative with the following information to verify they are the Agent of Record for the specific beneficiary.

* Broker/Agent Name
* Employer’s Name
* Tax Identification Number (TIN) or National Producer Number (NPN)
* And two of the following additional identifiers:
  + Beneficiary’s Name
  + Member ID
  + Beneficiary’s Date of Birth
  + Beneficiary’s address (only street address is required)

**Note:** The CCR can assist the Agent as long as they are able to provide the above information.

No changes to the account can be made by the agent.



Refer to **Broker** section of the [Caller Authentication and HIPAA Grid - CVS](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce) document for additional information.

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| Request from an Agent |

An agent who completed full authentication may be limited to the items that can be requested on behalf of the beneficiary, if the beneficiary is not on the call.

Items an Agent **can** request on behalf of the beneficiary:

* Order replacement ID cards
* Order replacement fulfillment items
* Inquire about claims and billing issues

Items an Agent **cannot** request without the beneficiary on the call:

* Filing of a Grievance
* Initiate or provide status of a Coverage Determination/Appeal
* POA or AOR

**Note:** If the broker is requesting to change the beneficiary’s permanent and/or mailing address, the beneficiary must provide verbal approval for the change.

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| Capture Activity |

All calls received from a broker **MUST** include the following in Capture Activity:

* **Activity Log Notes:** <Broker Name> called on behalf of <Beneficiary Name>
* **Source of Contact:** Client

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| Related Documents |

Grievance Standard Verbiage (for use in Discussion with Beneficiary) section in [MED D - Grievances Index](file:///C:\Users\C337799\Downloads\TSRC-PROD-007931)

**Parent SOP:** CALL-0048: [Medicare Part D Customer Care Call Center Requirements-CVS Caremark Part D Services, L.L.C.](https://policy.corp.cvscaremark.com/pnp/faces/SecureDocRenderer?documentId=CALL-0048&uid=pnpdev1)

**Abbreviations/Definitions:** [Abbreviations / Definitions](file:///C:\Users\C337799\Downloads\CMS-2-017428)

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