# **Aetna - Verify Password/Restrictions**

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**Description:**  This document covers where to locate and verify a member’s privacy record/restrictions.

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| **General Information** |

A  **Privacy Health Record**(padlock) icon indicates that the member has a privacy record on their account. To protect member privacy, on every call CCRs MUST review the Privacy Information screen before releasing member information to the caller.

Privacy records are created on a member’s account when a member:

* Requested a password be placed on their account
* Requested restricted access to their information
* Submitted a legal document concerning who can access their PHI. This may include Third Party Authorizations (TPA) or Power of Attorney (POA)

Reasons for placing a password on the account may include, but are not limited to the member:

* Wants to prevent others from “calling on their behalf”
* Is concerned that someone may call in and pretend to be the member

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| **Process** |

Perform the following steps to verify if there are any Password or HIPAA Restrictions on the member’s profile:

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| **Step** | **Action** | | |
| **1** | Access the member’s profile in PeopleSafe and look for the  **Privacy Health Record**(padlock) icon on the Main Screen. | | |
| **If the Privacy Health Record (padlock) icon is...** | | **Then...** |
| Displayed | | 1.  Click the **Privacy Health Record**(padlock) icon.  **Result:**  The Privacy Information screen displays.  2.  Proceed to Step 2. |
| NOT displayed | | There are no privacy records located in the Privacy Information screen on the member’s account.    **Note:**  If the member requests to add a restriction, warm transfer to the Senior Resolution Team. The Senior Resolution Team will refer to [Aetna Senior Team - Authorization Form for Restrictions and Confidential Communications - HIPAA](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5e38d3d4-0d24-4269-9c22-8234ea062f56). |
| **2** | Proceed depending on if there are passwords or restrictions on the member’s profile.    [Password is located](#PasswordLocated)  [Restricted Access is located](#RestrictedAccessLocated)  [Other Legal Document (OLD) located - TPA or POA is listed](#OLDLocated) | | |
| **If…** | **Then…** | |
| Password is located | The caller must provide the password shown in order to continue call (this includes the member).    **Notes:**   * If the caller is unable to provide the password, the CCR should not provide any information, even if the caller is able to authenticate and provide specific information, such as a drug name. * If the member requests to add, change, or remove a password (including if they state they forgot their own password), address ALL the member’s other needs and questions, and then warm transfer them to the Senior Resolution Team. | |
| Restricted Access is located | If caller matches the name listed on restricted access on profile, the CCR cannot continue the call.    **Note:**  If member requests to add a restriction, transfer to the Senior Resolution Team. The Senior Resolution Team will refer to [Aetna Senior Team - Authorization Form for Restrictions and Confidential Communications - HIPAA](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5e38d3d4-0d24-4269-9c22-8234ea062f56).    **Example:**Restricted access; block on file. If John Doe calls in, Customer Care cannot continue the call with them. | |
| Other Legal Document (OLD) located - Third Party Authorization (TPA) or Power of Attorney (POA) is listed | If caller matches the TPA or POA on file, refer to Step 4 in the Process section of [Aetna - Caller Authentication and HIPAA Grid](CMS-PRD1-058702) to determine the level of information you can discuss with caller.   * If member requests to add a TPA or POA, refer to [Aetna - Handling of HIPAA-Related Requests](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ffa2ed6e-f05c-4ac8-add4-84ec5e977e43).     **Example:**  Other legal document (OLD) displayed as the Privacy Type on this member’s profile. To see more details about this Privacy Type, select the name, and click on the More Details button. The bottom of the screen will populate with additional information (in this example, the wife has Power of Attorney). | |
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