# **Compass - Prescription (Rx) Transfer**

[Transfer Retail to Mail Process](#_Toc207707158)

[Member Requesting Rx Transfer from our Mail Order to Another Pharmacy](#_Toc207707159)

[Member Requests to Transfer Prescriptions from Another Mail Order to Our Mail Order Pharmacy](#_Toc207707160)

[Pharmacy Prescription (Rx) Transfer Scenario Guide](#_Toc207707161)

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**Description:**How to transfer a prescription, along with additional scenarios and steps for agents to use to submit an offline Support Task (formerly known as Resolution Manager [RM] Task/Service Resolution) with an existing claim in Compass.

*  Do **not** offer to call the Retail pharmacy to initiate the Rx transfer. The pharmacy that will fill the medication must start the Rx transfer process.
* Before any transfers are initiated to Caremark Mail Order, refer to [Medications not Available via Home Delivery (026885)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c46dd06b-3aa7-427e-a8b2-004a4d094c16) to ensure we carry the medication.
* For Rx transfers from one Caremark account to another Caremark account, refer to [Compass - Transfer Existing Rx to Another Account (Carrier-to-Carrier/Open Rx Transfer) (057128)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6763e5a4-e98e-47f0-8738-c79178ab685b).
*  If speaking to a fully verified **Pharmacist** or **Pharmacy Tech** calling to request a transfer of a Rx(s) from our Mail Order to their pharmacy, refer to [Compass - Rx Transfer: Pharmacist Requesting a Prescription Transfer (Retail to Mail) (041409)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5c75c145-b15c-441e-aba2-190ab033d68f). This process is not specific to either Compass or PeopleSafe.
* If CVS Specialty is calling to request a transfer of a specialty medication that has been received by CVS Caremark Mail Order Pharmacy, then warm transfer caller to Clinical Care Rx Transfer Department at **1-866-251-3591 (do not disclose this number, internal only)**and select**Option 1** Pharmacy Requesting an Rx Transfer.



* Any Mail Order Rx that has not expired and which has refills available **can** be transferred, regardless of whether the Compass/PeopleSafe profile is Active or Inactive.

**Note:** Encourage the member to allow us to initiate a request for a New Rx:

* If the member agrees, refer to [Compass - Obtaining a New Prescription (Rx) for the Member (New Rx Request) (054208)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a7684ce9-c2bc-4cbc-ab37-c1ffb7789706) for the process to initiate the New Rx Request.
* If the member refuses the offer to initiate a New Rx, continue to the applicable transfer section of the work instruction.

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| Transfer Retail to Mail Process |

Follow the steps below:

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| **Step** | **Action** | | | | | |
| **1** | Create a Test Claim to confirm the Rx is available through Mail Order. Refer to [Compass – Test Claims (050041)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=60c20ea0-1d07-46e3-809a-b54734b80fbe). | | | | | |
| **2** | Verify that the member has enough medication on hand:  How much medication do you have on hand?   * If less than ten (10) days’ supply on hand, refer to [Compass - Member Low or Out of Medication (063003)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=91f73b9d-e568-48dd-9ab4-88cb2654d4c9)and complete as appropriate. * If more than ten (10) days’ supply is on hand, proceed to the next Step.   **Note:** Retail to Mail Prescription transfer can be initiated for multiple members at one time. A separate support task would be needed for each member. | | | | | |
| **3** | Determine if a Support Task has already been created. Refer to [Compass - View Support Task History (050044)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1674c564-fc41-42ad-a7c2-f3b610716cba). | | | | | |
| **If…** | **Then…** | | | | |
| Yes | Advise the caller a Support Task already exists and provide the turnaround time.  **Turnaround Time:**Up to three (3) business days followed by the standard order process up to five (5) business days’ time which does not include shipping time.  **Note:** The turnaround time (TAT) is dependent on the pharmacy with the prescription sending us the Rx. We cannot guarantee a pharmacy will respond to our request.  Refer to [Compass - Order Shipping Turn Around Time (TAT) (062824).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=31ee69db-e3d5-4717-b336-23ca51f1191e) | | | | |
| No | Proceed to the next step. | | | | |
| **4** | Advise the member we can send a new prescription request to their doctor.  **Note:** There are many reasons a prescription transfer request may fail. Encourage the member to allow you to obtain a new prescription from their doctor. | | | | | |
| **If member…** | | | **Then…** | | |
| Agrees to new prescription (Rx) request | | | Refer to [Compass - Obtaining a New Prescription (Rx) for the Member (New Rx Request) (054208)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a7684ce9-c2bc-4cbc-ab37-c1ffb7789706). | | |
| Refuses | | | Continue to the next step. | | |
| **5** | Advise the caller that the prescription transfer requires enough remaining refills for a 90-day supply. At least one 90 Day Supply (DS) or three (3) 30 DS refills are needed to successfully initiate the Mail Order Rx transfer.  **Notes:**   * If the member wants less than the maintenance dose at Mail Order, then warm transfer the caller to **FastStart** who can assist the member with obtaining a new prescription for less than a maintenance dose. * Transferred Rx’s for a 30-day supply are not automatically sent for bulk up and not all plans allow for a bulk up to 90 days. | | | | | |
| **If a Rx transfer is…** | | | **Then…** | | |
| **Available**  **Example:** The member has a valid prescription at a Retail pharmacy for at least 90 days’ supply inclusive of all refills. | | | Proceed to the next step. | | |
| **Not available**  The Rx transfer is unavailable if any of the following criteria apply:   * Prescription is expired or does not have enough refills remaining. * C2 Controlled Substances. * C 3-5 Rx that has never been filled or has already been transferred. * Compounded Prescription. * Member’s plan does not participate in Mail Order (MOR). * The Retail pharmacy where the Rx was issued is in Arkansas, Nebraska, New York, Puerto Rico, Utah, or Washington state, which cannot transfer prescriptions to other states; instead, a new prescription is required. * **New York (NY)** * When a new electronic prescription is received at a New York pharmacy and then the patient requests that the prescription be filled at a different pharmacy, this state allows the new unfilled prescription to be transferred to another pharmacy within the same state to be filled. * Allow one prescription refill per transfer with the original day’s supply. * When the prescription is transferred and is filled one time at a New York pharmacy, that pharmacy may not transfer the remaining refills back to the original Mail Order Pharmacy. * **Washington (WA)** * The state of WA requires Rx transfers to be completed electronically or via fax. Assist the member with sending a [New Prescription Request](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a1443f4f-499e-442c-be11-fd2b207bf86c)  (058827) to their physician. | | | What we can do is contact your prescriber for a new 90-day supply of your prescription. It will maximize your benefits and ensure you receive the proper days’ supply for mail service.  Then proceed to [Compass - Obtaining a New Prescription (Rx) for the Member (New Rx Request) (054208)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a7684ce9-c2bc-4cbc-ab37-c1ffb7789706).   * If the caller does not want to proceed with a New Rx Request, offer them the following options.   Their prescriber can:   * + **eScribe** the prescription to CVS/Caremark.   **ERX Electronic Address:**  One Great Valley Blvd  Wilkes-Barre, PA 18706   * + **Fax** the prescription to CVS/Caremark at **1-800-378-0323**.   + **Call** the prescription into CVS/Caremark at **1-800-378-5697**.   **Note:** If the members’ plan does not participate in Mail Order (MOR), we cannot assist with a prescription transfer or a new Rx request. Member should contact their preferred in-network pharmacy where they would like to fill the medication at for assistance.  Refer to [Compass - Controlled Substance State Laws (058033).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=76fe19d9-b159-43a4-9db5-077ba1f6a958) | | |
| **6** | Navigate to the **Claims** **Landing Page** to determine if the Rx(s) requesting to be transferred is listed on the Claims table.  **Note:** The Claims view is defaulted to All. Navigate to filter to select desired claim type such as **Example:** Retail view. | | | | | |
| **If…** | | | **Then…** | | |
| Rx(s) is listed in the Claims Table | | | Proceed to the next step. | | |
| The member requests a transfer of Rx(s) that is **not listed** on the Claims table.  **Example:** Filled Rx(s) at a retail pharmacy with Prior PBM. | | | A new prescription is needed.  Refer to [Compass - Obtaining a New Prescription (Rx) for the Member (New Rx Request) (054208)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a7684ce9-c2bc-4cbc-ab37-c1ffb7789706). | | |
| **7** | Check the box next to the **Rx #** for each medication the member wants to transfer to the Mail Order Pharmacy.    **Result:** The Transfer Retail to Mail button illuminates.    **Notes:**   * The **Transfer Retail to Mail** button is disabled until at least one Rx is selected. * The **Transfer Retail to Mail** button does not display on screen if no claims are listed.   Review the Pharmacy Name and store number for the selected Rx(s). | | | | | |
| **If…** | | | | **Then…** | |
| The member is only transferring one Rx. | | | | Continue to step 8. | |
| All Rx’s are at the same retail pharmacy. | | | | Only one support task is required, continue to step 8. | |
| All or some prescriptions are located at multiple retail pharmacies. | | | | A separate support task will need to be submitted for prescriptions being transferred from each pharmacy.  Complete steps 7-12 for the transfer of prescriptions from each pharmacy. | |
| **8** | Click the **Transfer Retail to Mail** button.    **Result:** Transfer Retail to Mail Support Task screen displays.  **Notes:** If selected Rx(s) are ineligible, a dynamic **Transfer Retail to Mail Notifications** popup displays indicating the reason for ineligibility. For assistance, refer to Scenario Guide.  **Example:** A prescription filled at a pharmacy in Arkansas displays: “The retail pharmacy is located in a state that does not allow transfers to mail.”     * To exit, click **Close**.   **Result:** Compass automatically runs a Test Claim. | | | | | |
| **9** | Review the Test Claim results at the top of the **Transfer Retail to Mail Support Task** screen to ensure the medication is covered through Mail Order. Refer to [Compass - Test Claims (050041)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=60c20ea0-1d07-46e3-809a-b54734b80fbe) as needed.    **Notes:**   * Compass displays the following message when a Test Claim **cannot** be completed: “Test claims failed to run. **Try rerunning test claims**.” Refer to the [Scenario Guide](#_Pharmacy_Prescription_(Rx)) for further information. * If the member decides not to transfer any of the medications selected on the previous screen, click **Cancel** at the bottom of the screen. * If the member decides to remove medication(s) from the Rx Transfer request, from the Test Claim section, click the **Row Level Action** drop-down arrow for that medication and select **Remove**. | | | | | |
| **10** | 1. Offer the member a **New Rx Request**.   **Note:** Prescription transfers can fail for multiple reasons, always offer a New Rx Request before proceeding with a prescription transfer.   1. Check the acknowledgment box stating that “Caller has declined a New Rx Request and confirmed the Rx at the pharmacy is valid and has refills available” that will display in the Pharmacy Contact information section of the Transfer Retail to Mail Support Task. | | | | | |
| **If member…** | | **Then…** | | | |
| **Accepts** New Rx request | | Refer to [Compass - Obtaining a New Prescription (Rx) for the Member (New Rx Request) (054208)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a7684ce9-c2bc-4cbc-ab37-c1ffb7789706). | | | |
| **Declines** New Rx request and would like you to proceed with prescription transfer | | Check the acknowledgment box stating that “Caller has declined a New Rx Request and confirmed the Rx at the pharmacy is valid and has refills available” that will display in the Pharmacy Contact information section of the Transfer Retail to Mail Support Task.  Proceed to next step. | | | |
| **11** | Complete the required fields for the **Transfer Retail to Mail Support Task**.     * Ensure the task is submitted under the line of eligibility for the applicable member (select the correct family member). * Review and confirm the member’s shipping address and phone number are correct before submitting the request.     **Note:** If the member’s address, phone number, or payment method need to be changed, click the related drop-down menu to select from existing shipping addresses/phone numbers/payment methods on the member’s account.  Refer to [Compass - Create a Support Task (050031)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6). | | | | | |
| **If the Shipping Address/Phone Number/Payment Method, the member provides is…** | | | | | **Then…** |
| Available to select from the related drop-down menu. | | | | | Select the existing Shipping Address/Phone Number/Payment Method and proceed to the next step. |
| **Not** available to select from related the drop-down menu | | | | | 1. Click the **Add/Update** button next to the related drop-down menu and add the new/updated information to the member’s account. Refer to the below for more information as needed:    1. [Compass - Add / Edit / Delete Mailing Address (053255)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9cfb4422-7129-4bca-b1ea-f1d6fa964906).    2. [Compass - Add / Edit / Delete Phone Number (053256)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c37d4289-63b2-4732-a35c-c411cc26a29c).    3. [Compass - Add, Edit, and Delete Mail Order Payment Methods (Credit Card & eCheck) (056289)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a1a67eb-a7b1-4ae5-bcfe-e986bbe4aa3d). 2. Click **Refresh for Updates** to add it to the related drop-down menu. 3. Click the **drop-down menu** and select the newly added/updated information. 4. Proceed to the next step. |
| **12** | Click **Submit Support Task** once all fields are complete and verified.  **Note:** If a pop-up message displays indicating the Test Claim failed or Rx(s) is Not in Stock at Mail, refer to the [Scenario Guide](#_Pharmacy_Prescription_(Rx)).    **Notes:**   * To exit, click **Cancel**. * If Automation fails, refer to [Compass - Obtaining a New Prescription (Rx) for the Member (New Rx Request) (054208)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a7684ce9-c2bc-4cbc-ab37-c1ffb7789706). * If a member does not want us to send a new Rx request, the member can mail in a new written Rx, or their prescriber can:   + **eScribe** the prescription to CVS/Caremark.   **ERX Electronic Address:**  One Great Valley Blvd  Wilkes-Barre, PA 18706   * + **Fax** the prescription to CVS/Caremark at **1-800-378-0323**.   + **Call** the prescription into CVS/Caremark at **1-800-378-5697**. | | | | | |

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| Member Requesting Rx Transfer from our Mail Order to Another Pharmacy |

* If speaking to a member and they request Caremark to transfer from mail to retail, determine if it is an MChoice transfer.
* If yes, refer to [Compass - Maintenance Choice (MChoice) Rx Transfer (056032)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cc2503bf-62dc-4db1-ad98-abfe4e9e98d4).
* If not, provide the member with the customer care phone number listed in the CIF, Client Information screen. This is the phone number they need to provide to their pharmacy.

 The filling pharmacy must request the transfer. Turnaround time is dependent on when the retail pharmacy calls for transfer. Do not create Support Task or provide Clinical Care Services phone number.

* If speaking to a fully verified Pharmacist or Pharmacy Tech from the pharmacy, note their first name & last initial, job title and Pharmacy NPI for your Notes, then warm transfer caller to Clinical Care Rx Transfer Department at **1-866-251-3591 (do not disclose this number, internal only)**and select**Option 1** Pharmacy Requesting an Rx Transfer.

**Note:** For additional information and Hours of Operation, refer to [Phone Numbers (004378) section titled Clinical Care Services Clinical Counseling](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f22eb77e-4033-4ad9-9afb-fc262f29faad).

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| Member Requests to Transfer Prescriptions from Another Mail Order to Our Mail Order Pharmacy |

Perform the steps below:

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| **Step** | **Action** | |
|  | From the Claims Landing page, **Mail Rx** tab, check the **Prior PBM Prescription** drop down to verify if the Rx has been transferred.  **Note:** For more information, refer to the “Selecting Prior PBM Prescriptions” section within the scenario guide of [Compass - Mail Rx Refill/Renewal (Order Placement) (054262)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=ad3a7263-725b-4d5d-a2ec-440f1f30d79c). | |
| **If the prescription is…** | **Then…** |
| **On File** | Place the refill as normal, refer to [Compass - Mail Rx Refill/Renewal (Order Placement) (054262).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad3a7263-725b-4d5d-a2ec-440f1f30d79c) |
| **Not on file** | Proceed to the next step. |
|  | From the **Case Data** section that displays at the top of all Compass screens, click the **Create Support Task** button.  Ensure the task is submitted under the line of eligibility for the applicable member (select the correct family member).  **Note:** Check that a support task for this has not been initiated in Compass and select the “View PeopleSafe Activity” link to ensure that no RM task was created. | |
|  | Submit the following Support Task:  **Task Type:** Transfer Other Mail Rx to Our Mail Order  **Complete all required fields.**   * **Drug Names:** IncludeRx Number, Rx Name and Rx Strength * **Pharmacy Phone #:** PBM phone # including area code * **Pharmacy Name:** PBM where the Rx is currently at * **Acknowledgement:** Rxis valid/has more refills   **Add in the Notes Section:**  Transfer to Home Delivery, Day Supply of Rx is <enter day supply>.  **or**  Transfer to Home Delivery member is aware of current day’s supply of Rx is less than 90 days.  Refer to [Compass - Create a Support Task (050031)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6) or [Compass - Support Task Types and Uses List (058147)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6753488f-3996-45d9-88ba-257575369a98), as needed. | |

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| Pharmacy Prescription (Rx) Transfer Scenario Guide |

Utilize the scenario guide for the following situations:

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| **Scenario** | **Action** | |
| **Test Claims Failed to Run** | * 1. Click the **Try rerunning test claims** hyperlink.     **Result:** The Transfer Retail to Mail Support Task – Test Claim Results screen displays.   * The Approved/Rejected column displays: “Test Claim failed.” * The following message displays in the Cost section: “Test Claim failed. Run a manual test claim.”   1. Click the **Run a manual test claim** hyperlink.     **Result:** The Test Claim subtab opens.  **Notes:**   * Test Claim Status field displays: “Test claim failed.” * The Total Cost is blank.   1. Return to Transfer Retail to Mail Process [Step 8.](#RetailtoMailStep8) | |
| Clicking Submit Support Task  The test claim failed to run automatically. | When the Review the Following pop-up message displays, a manual Test Claim is needed to provide the member with the copay amount:  “The test claim failed to run automatically. Verify you have provided the copay.” | |
| **If...** | **Then...** |
| Manual Test Claim has been run | 1. Click the **checkbox** to indicate “I have run a manual test claim and provided the copay amount to the member.”   Please note the prices quoted are estimates and may not reflect your actual out-of-pocket costs.    **Note:** The disclaimer only needs to be communicated once to the member during the same call.  **Result:** ThePlace Order button illuminates.   1. Click **Place Order** to continue with the order.   **Note:** Click **Cancel** to return to the Transfer Retail to Mail Support Task screen. |
| Some Rx(s) are Not in Stock at Mail | * Educate member on Rx(s) Not in Stock at Mail, which will be removed from the transfer request. * To submit the request for other available Rx’s, click **Submit Support Task**.     **Result:** The Transfer Retail to Mail Support Task is successfully submitted.  **Notes:**   * To exit, click **Cancel**. * If Automation fails, refer to [Compass - Obtaining a New Prescription (Rx) for the Member (New Rx Request) (054208)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a7684ce9-c2bc-4cbc-ab37-c1ffb7789706). * If a member does not want us to send a new Rx request, the member can mail in a new written Rx, or their prescriber can:   + **eScribe** the prescription to CVS/Caremark.   **ERX Electronic Address:**  One Great Valley Blvd  Wilkes-Barre, PA 18706   * + **Fax** the prescription to CVS/Caremark at **1-800-378-0323**.   + **Call** the prescription into CVS/Caremark at **1-800-378-5697**. | |
| All Rx(s) are Not in Stock at Mail | * Educate member on **All** Rx(s) ineligible to transfer to mail. * To cancel transfer request, click **Cancel Transfer**.   **Result:** Agent is returned to the Claims Landing Page.    **Note:** To return to the Transfer Retail to Mail Support Task screen, click **Close.** | |
| All Rx(s) ineligible to Transfer to Mail | * Educate member on **All** Rx(s) ineligible to transfer to mail. * Click **Close**.     **Result:** Agent is returned to the Claims Landing Page.   * Proceed to [Step 7](#RetailtoMailStep7) in the Transfer Retail to Mail Process. | |
| Rx(s) selected are located at multiple pharmacies | Transfer Requests can only be submitted to Rx(s) at the same pharmacy.   * Inform member a separate transfer request will be submitted to each pharmacy. * Click **Close**.     **Result:** Agent is returned to the Claims Landing Page.   * Proceed to [Step 7](#RetailtoMailStep7) in the Transfer Retail to Mail Process. | |
| Some Rx(s) are ineligible to Transfer to Mail | * Educate member on Rx(s) that will be removed from the transfer request. * Click **Continue with Transfer**. * If member does not want to continue, click **Cancel**.   **Note:** If agent clicks **Cancel**, the pop up will close and the Transfer Retail to Mail Support Task subtab will close without submitting the Transfer Retail to Mail support task.    **Result:** Transfer Retail to Mail Support Task screen displays.   * Proceed to [Step 9](#RetailtoMailStep9) in the Transfer Retail to Mail Process. | |

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| Retail to Retail Transfers |

Inform the member that the receiving pharmacy will need to call their pharmacy.

 CCR’s are **not permitted** to initiate this transfer on behalf of the member. A Registered Pharmacist from the pharmacy that will fill the medication must request a prescription to their pharmacy.

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| Turn Around Time |

**Support Task:** Up to three (3) business days followed by the standard order process time up to five (5) business days; however, this does not include shipping time.

**Note:** Advise the member that once the prescription is transferred to Mail Order, it fills and ships like a new prescription.

If the member wants the prescription placed on hold until a future date, add a Mail Alert to the account instructing Mail Order to place the transferred Rx on hold. Refer to [Compass - Viewing, Adding, and Editing Alerts (054194)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=36c941d2-25a6-4075-993d-f12deb31be18).

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| Related Documents |

**Parent Document:**[CALL 0049 Customer Care Internal and External Call Handling](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0049)

[Customer Care Abbreviations, Definitions, and Terms Index (017428)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c1f1028b-e42c-4b4f-a4cf-cc0b42c91606)

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