# PeopleSafe – Commercial Care Document Index (By Topic)

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**Description:** Index of document titles, content ID and their description based on specific topics.

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| Address Change |

Refer to as needed:

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| **Title** | **Content ID # /**  **(last 6 digits)** | **Description** |
| **PeopleSafe - Address, Email and Phone Number Changes** | [CMS-2-004566 (004566)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a09925d4-9dbb-407b-b579-c17eec6e62ee) | Covers the processes and Talk Tracks when a member requests an address change or removal. |
| **Address, Phone and Fax Number Changes for Prescribers and Pharmacies** | [CMS-PCP1-028806 (028806)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=00ea6a48-8a47-415a-b8cf-b816a8c20850) | Used when a pharmacy or prescriber’s office requests updates to their address, phone, or fax number for Home Delivery/Mail Order. Address, phone, and fax changes affect other communications sent to the prescriber’s office and pharmacy such as letters, faxes, phone calls, etcetera. |
| **PeopleSafe - Address Abbreviations for U.S. Territories and Canada** | [CMS-PCP1-026065 (026065)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5c30352b-8c77-4229-9f2f-18599b967424) | Address abbreviations for U.S. Territories and Canada. |

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| Affordable Care Act (ACA) |

## Refer to as needed:

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **CVS Caremark Formulary Drug List Index** | [CMS-PRD1-116624 (116624)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c5ec5253-d3a9-42d5-aeff-6656b12c8dfb) | Centralized index for all CVS Caremark drug lists, also known as a formulary. The ACA Preventive Service List can be found at the bottom of the page. |
| **Affordable Care Act Preventive Services with MAT** | [TSRC-PROD-049554 (049554)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d5200375-908e-4176-ac44-b385b3628487) | List with MAT. |
| **Affordable Care Act Preventive Services without MAT** | [TSRC-PROD-049839 (049839)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3a86d3c0-1d04-4792-8904-68abdcae2f61) | List without MAT. |
| **Breast Cancer Prevention: Addition to ACA Preventive Services** | [CMS-PRD1-088916 (088916)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=74241a25-5022-4833-b62d-48bbd4b51dea) | Breast cancer prevention has been added to the Affordable Care Act preventive service requirements. Clients are now required to select one of two options to add generic raloxifene, generic tamoxifen citrate and the aromatase inhibitors exemestane 25 mg (milligram) and anastrozole one (1) mg at no cost to female members aged 35 and older when their doctor has recommended, they take the medication to reduce their risk of developing breast cancer in the future. |
| **Health Insurance Exchange Marketplaces** | [CMS-PRD1-078381 (078381)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=32f9e836-6dfa-435b-931c-2b6bc62745c4) | Health Insurance Exchanges that were effective 01/01/2014, the online marketplaces where consumers and employers and employees of small businesses can shop for health insurance. On these websites, they can compare the plans available to them and then purchase online. |

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| Billing/Payment |

Refer to as needed:

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Billing & Payments Index** | [TSRC-PROD-049663 (049663)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=be58f9e6-2fde-4398-bce1-6f862189f89c) | List of all Billing and Payments documents relevant to Commercial Care Representatives. |

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| Bridge Supply |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Bridge Supply Short Term Prescription (Rx) Refills** | [CMS-PCP1-017906 (017906)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0d316a1d-f02d-4849-9b36-eb56a6ce9b57) | Provides information for offering a short-term supply or ‘bridge’ of medication(s) to members through a CVS retail pharmacy. |
| **Hawaii Clients Only: HIP Bridge Supply Short Term Prescription (Rx) Refills** | [TSRC-PROD-045269 (045269)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=33608c59-7193-4b11-9673-1ffbf8a66433) | A short-term supply (ten (10) days) sent to a CVS retail pharmacy when member is low on medication and cannot wait for Mail Order/Home Delivery to mail the prescription. |

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| Bulk Up |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **PeopleSafe - Bulk Up Rules CCR** | [CMS-PCP1-030449 (030449)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e92bf2fd-2808-48f6-bb6d-fd22f0077735) | Procedures and parameters before requesting to Bulk Up a home delivery prescription to a 90-day supply. |
| **Mail Pharmacy Quantity Optimization - Bulk Up/Refill Consolidation** | [CMS-2-020766 (020766)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6232a87b-61fe-445f-9605-89b19f0a716f) | Describes Quantity Optimization program in which the mail service pharmacy contacts the prescriber to request a 90-day supply when a new prescription is written for a 30-day supply with at least two (2) refills. |

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| Call Handling & Quality |

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| **Title** | **Content ID # (Last 6 digits)** | **Description** |
| **Compass and PeopleSafe - Downtime Procedures** | [CMS-2-027110 (027110)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9e6c6901-f053-4575-9238-3f1f68feea78) | Steps to take when our software applications, the Internet, Web Portal, or computers experience outages to minimize member inconvenience, which is paramount to increasing member overall satisfaction. |
| **HIPAA (Health Information Portability and Accountability Act) Grid - CVS** | [CMS-2-028920 (028920)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce) | Personal and System information that you may or may not perform or provide information depending on your caller type. |
| **Compass - Basic Call Handling – Opening the Call, Call Hold, Warm and Cold Transfer** | [TSRC-PROD-066076 (066076)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0) | How to accept and redirect inbound calls within Compass regarding a plan member’s prescription benefit plan. |
| **Call Handling: Phonetic Alphabet and De-escalation Tips** | [CMS-PRD1-108954 (108954)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d340e545-7be8-4bd6-bb1e-87f0e23b0211) | Using these tips will help improve call handling procedures. |
| **Disconnected, Dropped, No Caller (Ghost Calls), Spam, Automated, and Looping Calls** | [CMS-PCP1-021760 (021760)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=480af287-dcb8-4305-84c5-dfe8e0c39312) | Procedures for when a caller has been disconnected or the line has been dropped. Includes instructions for when no caller is on the line (ghost calls), spam/fake calls, when the caller walks away from the phone, and when the caller has not disconnected at the end of the call and procedures for Vendors on how to report phone problems. |
| **Handling Angry and Abusive Calls** | [CMS-2-010219 (010219)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7d5a8c69-8516-46c3-aeea-8389fa5b1015) | Guidelines on handling abusive callers and/or callers displaying inappropriate behavior and/or language and provide details on when and how to escalate the call, if necessary. |
| **Handling Crisis Calls** | [CMS-PCP1-024225 (024225)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=2b3d92dd-46c5-4ee7-b1be-7a4c849206ed) | How to handle a crisis call when a member calls and is in medical distress, makes a threat, or has caused harm to themselves or others. |
| **PeopleSafe - Handling Repeat Callers: Multiple Calls, Same Issue** | [TSRC-PROD-045155 (045155)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=01ded425-9976-4840-b360-4619266505fc) | Steps for Customer Care Representatives across all lines of business to follow when the Repeat Caller indicator populates in PeopleSafe. |
| **Incoming Artificial Intelligence (AI) Calls to Customer Care (Automated or Computer Calls)** | [TSRC-PROD-059690 (059690)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bb0302e9-28d0-4455-b6eb-26c603fbaa3c) | Incoming calls increasingly utilizing Artificial Intelligence cannot be used for authentication or to obtain member information. |
| **Outbound IVR Calling Members** | [TSRC-PROD-062316 (062316)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=084496f8-38c7-4833-86b6-8ec0c1bf7e5b) | Instructions for handling a call where the IVR makes an outbound call to a member and the call is transferred to the CCR for resolution. |
| **Compass and PeopleSafe - Transferring Calls to Dedicated Client Teams** | [TSRC-PROD-062992 (062992)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4c87518d-83f5-4884-8631-1f427b77da7d) | Process for handling calls from members who receive benefits through a client with a dedicated team. |
| **Universal Care - Caller Authentication** | [CMS-2-004568 (004568)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bcb8da72-5501-4631-b9fd-fe675bc4a1fd) | How to take reasonable steps to verify a person’s identity before disclosing PHI. It outlines guidance from the Privacy Office and provides the talk tracks and procedures when making outbound calls from Customer Care. |
| **Universal Care - Consultative Call Flow (CCF) Process** | [CMS-PRD1-095822 (095822)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c954b131-7884-494c-b4bb-dfc12fdc846f) | Provides a foundation that gives representatives control of their call and helps them to create a positive caller experience. |

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| Caremark.com |

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| **Title** | **Content ID #/ (last 6 digits)** | **Description** |
| **Caremark.com - Work Instruction/Job Aid Index** | [CMS-PRD1-105672 (105672)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=8a2da44a-6336-454d-8deb-fca4a71ad69b) | Commonly used instructions to assist a representative with Caremark.com inquiries. |

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| Clinical |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **PeopleSafe - When to Transfer Calls to Clinical Care** | [CMS-2-024833 (024833)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ff2706a9-6f42-4ccd-87e1-59cb2ce103a8) | Details of the process to handle a clinical inquiry from a member. |
| **Clinical Counseling Pharmacist After Hours Process** | [CMS-PCP1-025502 (025502)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=11046d79-1420-4e0e-b312-affdbc9efa9a) | Instructions for when a plan member needs to speak with a pharmacist regarding an issue that cannot wait until the next business day, and it is after normal operating hours or on the weekend. |
| **Member Counseling by Pharmacist (Clinical Inquiry)** | [CMS-2-004570 (004570)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=58362b74-6843-4fae-a65d-24a2b0b812e3) | How to handle a call from a member requesting to speak to a pharmacist regarding a clinical question about their prescription. |

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| Complaints/Compliments (member) |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **PeopleSafe - Handling Member & Prescription Complaints, Compliments or Suggestions** | [CMS-PCP1-026703 (026703)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=03e1a9ae-7ffa-4472-8204-64920f27615c) | Describes how to effectively service our members when they are calling and requesting to submit a verbal/written discrimination complaint, compliment, or suggestion regarding our Home Delivery/Mail Order or our Retail Pharmacy services. |
| **HIPAA (Health Insurance Portability and Accountability Act) - Disclosure Reporting and Complaints** | [CMS-PCP1-027852 (027852)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=555c2e42-bed9-4648-91b9-19dc103b0ff1) | Process for handling HIPAA Issue and Disclosure complaints and escalations. |
| **HIPAA (Health Insurance Portability and Accountability Act) Workstation Security, Sending Email or Fax Communications and Complaints** | [CMS-2-026649 (026649)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=15ae96bb-d1a0-4a9f-9356-86a9f47eb996) | Information related to HIPAA to support Workstation Security, proper handling of sensitive information, and how to respond to complaints. |
| **Handling Doctors and Prescribers Phone Calls** | [CMS-2-018350 (018350)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=99045020-7de5-4713-8c66-edad7ef3f200) | Process for handling telephone inquiries or complaints from an external prescriber/prescriber’s office. |
| **Request for Privacy Office/Officer** | [TSRC-PROD-002186 (002186)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1b12e088-b8a4-4093-94b4-e8a3093d0398) | How a CCR will address a member request for a Notice of Privacy Practice or information on how to contact the Privacy Office/Officer. |

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| Compound |

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| **Title** | **Content ID #(last 6 digits)** | **Description** |
| **PeopleSafe - Handling Compound Calls - Care** | [CMS-PCP1-022684 (022684)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9c243979-a697-4afb-90b8-7c1fcc1f4568) | Provides the Point of Sale and Paper Claims procedures when a member is asking about a newly compounded prescription, asking for a refill for compounding medications. |
| **Paper Claim Multi-Ingredient Compound Prescription** | [TSRC-PROD-042384 (042384)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=06a1b33b-4f4a-4603-a8ab-e0f1376bfdca) | Used to determine when a reimbursement claim is filed and when a plan member has paid “out-of-pocket” for a multi-ingredient compounded prescription purchased at a retail pharmacy. |

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| Controlled Substance |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **PeopleSafe - Controlled Substance Information (C2-C5)** | [CMS-PRD1-067214 (067214)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=dc09fa82-fcf6-495a-ae85-50cd798c6815) | Information for when a member needs to fill a prescription for a controlled substance and the signature requirements when the prescription is delivered. |
| **Controlled Substance State Laws** | [CMS-2-004776 (004776)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=10965139-fc1c-42f6-92ac-7933d76a9117) | Information on the process for handling calls referring to state laws for processing and filling Controlled substance prescriptions. |
| **Compass and PeopleSafe - Prior Authorization, Exceptions, Appeals Guide then refer to Prior Authorization (PA) or Clinical Exception Opioid DUR Hard Reject for Above 200 MME/Day Job Aid** | [TSRC-PROD-063978 (063978)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=657ddfe3-27d1-4a21-8f51-8cbd3961001c) | Process steps to ensure agents are determining if a Prior Authorization or Clinical Exception is appropriate, and an index of links to specific Prior Authorization, Clinical Exception, and non-Clinical Exception specific process documents. This document applies to both Compass and PeopleSafe then refers to Information for when a member or prescriber calls requesting more information about Opioid DUR Hard reject for above 200 MME/day. |

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| COVID |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **COVID-19 At-Home Tests Talk Tracks** | [TSRC-PROD-049260 (049260)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=07c658ca-a5bd-4b6b-be11-28baed7d3a07) | Talk Tracks to assist with handling calls related to general information, ordering and reimbursement for the COVID-19 at-home tests. |
| **PeopleSafe - Submitting an Online Claim on Caremark.com for the COVID-19 at-home Test** | [TSRC-PROD-049265 (049265)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=2b90ee41-2755-45df-9ec5-1241b989d91e) | Provides the information to walk a member through the process of submitting their purchase receipts on Caremark.com for reimbursement of COVID-19 at-home test(s) purchased for their personal use, the turnaround time and what to do when the amount reimbursed is less than expected. This applies to Commercial plans only and there is not a digital option available for MED D/Medicaid plans at this time. |
| **MinuteClinic, E-Clinic, Telehealth and Telemedicine Frequently Asked Questions** | [CMS-PRD1-090037 (090037)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cbbae264-df50-49cb-9fab-e58e2996af2c) | Information about our MinuteClinic locations within our CVS Retail pharmacy stores along with E-Clinic and Telemedicine. MinuteClinic provides plan members with increased access to low-cost, convenient health care, as well as a financial incentive from co-pay reductions for many services. |
| **New York State (NYS) Medicaid Pharmacy Billing Guidance for At Home COVID-19 Tests** | [TSRC-PROD-049092 (049092)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=06e3fad8-5cd8-469a-95a5-208a05280b18) | Provides information when answering questions related to the New York City Medicaid Pharmacy Billing Guidance for at Home COVID-19 Tests. |

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| DAW |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Dispense as Written (DAW) Index** | [TSRC-PROD-059000 (059000)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=465090ff-6ad0-4556-8287-450ab184290d) | Listing of all related Dispense as Written (DAW) documents. |
| **PeopleSafe - Branded Generics** | [CMS-PRD1-059091 (059091)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e4b59eca-33ba-4e5c-bb8f-e54669906f71) | Information about Dispense as Written (DAW) 5 (Brand as Generic) Drugs, and instructions for when a member calls with questions about receiving a branded generic or about receiving the brand name version instead of a branded generic medication. |
| **Commercial as Tier 1 Preferred (DAW 9)** | [TSRC-PROD-049768 (049768)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=294e5d29-e781-4b76-b80a-4623740b9913) | Information about DAW 9, when a brand-name drug is a preferred and covered option over a generic. It includes instructions and suggested verbiage to use in the event a member questions why they received a brand-name drug at a Tier 1 copay. |

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| Diabetic |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Diabetic Programs & Supplies Index** | [TSRC-PROD-049788 (049788)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=91eac667-77eb-4131-8351-979ec7e1ae2e) | Hyperlinks to documents with descriptions related to diabetic supplies and programs. |

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| Documents Frequently Used |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Compass and PeopleSafe - Frequently Accessed Documents (Greatest Number of Views)** | [CMS-PRD1-089133 (089133)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4438f7ec-f0f1-4285-8cd2-f1cca22619de) | Titles, hyperlinks, and descriptions to documents with the greatest number of views in alphabetical order. If you find yourself looking for the same documents, bookmark the document in Google Chrome for easy reference in the future |

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| Drug (Medication) Information/Formulary |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **CVS Caremark Formulary Drug List Index** | [CMS-PRD1-116624 (116624)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c5ec5253-d3a9-42d5-aeff-6656b12c8dfb) | Centralized index for all CVS Caremark drug lists, also known as a formulary. |
| **Caremark.com - Covered Drug List - Formulary** | [CMS-PCP1-038389 (038389)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c0d789ba-e92a-46dc-8d94-061c20d54508) | Information on how members can view and print their Covered Drug List (Formulary). |

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| Drug List |

Refer to as needed:

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Compass – Search for CVS Retail Inventory (Drug Shortage / Out of Stock) and View Claim Details (RxConnect)** | [TSRC-PROD-066768 (066768)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c10d717e-f397-4f10-8fb6-3731cd856f5c) | Steps to search the CVS Retail Inventory to identify available medications, drug shortages, and view claim details. |
| **Medications not Available via Home Delivery** | [CMS-PCP1-026885 (026885)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c46dd06b-3aa7-427e-a8b2-004a4d094c16) | Provides a list of some of the medications that are not available through mail service due to regulations, dispensing requirements, etcetera. |

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| Eligibility |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **PeopleSafe - Resolution of Eligibility Issues** | [CMS-2-004587 (004587)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad278185-117d-433f-bdc2-9327b93c1944) | Process for when a member states that they should be eligible to have their prescriptions filled at our PBM but there seems to be some type of eligibility issue. |
| **PeopleSafe - Twins (Rx) Adjudication (Multiple Births)** | [CMS-PCP1-025065 (025065)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bc2957e6-d277-44fd-bdb0-37ce06631786) | Procedures for processing twin’s Rx adjudication. |

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| Emergency/Closure/Threats |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Call Center Emergencies** | [CMS-PRD1-058755 (058755)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7cbf7a7e-2479-43fc-8bb9-b1aefff2aed8) | Process for Customer Care Representatives (CCRs), Supervisors, Managers, and Resource Planning to follow in the event of an emergency at the Call Center, such as tornado, fire, flooding, etcetera. |
| **Customer Care Work from Home (WFH) Call Center Emergencies** | [TSRC-PROD-018628 (018628)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3f0beafc-0c03-4c61-853c-a09d6d3be278) | Process for Customer Care Representatives (CCR’s), Supervisors, Managers and Resource Planning to follow in the event of an emergency that work from home, such as tornadoes, fire, flooding, etcetera. |
| **Handling Crisis Calls** | [CMS-PCP1-024225 (024225)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=2b3d92dd-46c5-4ee7-b1be-7a4c849206ed) | Instructions for Customer Care representatives, Senior Team agents, and Case Coordinators on how to handle a crisis call when a member calls and is in medical distress, make a threat, or has caused harm to themselves or others. |

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| FastStart/New Prescription |

Refer to as needed:

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **PeopleSafe - Obtaining a New Prescription (Rx) for the Member** | [CMS-PRD1-058827 (058827)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a1443f4f-499e-442c-be11-fd2b207bf86c) | Handling calls from a member or authorized party regarding a new prescription request are included. |
| **PeopleSafe - Multiple Requests for the Same New Prescription** | [TSRC-PROD-045082 (045082)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=2c29a9e1-82af-4494-8ba2-be7e499096d0) | Steps to when a member has sent in multiple requests for a new prescription that we have not received and how to ensure that the member’s request is processed. |

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| Financial Statement of Cost (SOC) |

Refer to as needed:

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| **Title** | **Content ID #/ (last 6 digits)** | **Description** |
| **PeopleSafe - Financial Statement of Cost (SOC) Member, Spouse or Dependent** | [TSRC-PROD-043264 (043264)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7049837e-d636-430e-b990-ae0706bd09e9) | Use when a caller is requesting total co-pay and/or total cost of prescription (Rx) drug history. It displays prescriptions processed through the member’s prescription benefits. |
| **Duplicate Statement of Cost (SOC) Statements** | [CMS-2-004602 (004602)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3481aa7e-e514-45a8-8c9c-84e664588cf2) | Includes the process of how to respond to a member’s request to create a duplicate Statement of Cost (SOC). |

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| Forms (Member) |

Refer to as needed:

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **PeopleSafe - Forms Members Can Submit to Authorize Access and Release of Information for Their Account** | [TSRC-PROD-007394 (007394)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=970803bb-c0d8-4180-ae71-a8feab415b65) | Provides information about the types of forms that a member can submit to authorize access to and release of their Protected Health Information (PHI). |
| **Home Delivery Order Form Frequently Asked Questions and Sample** | [CMS-PCP1-027162 (027162)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bfbf4fbb-a1ba-4967-a7b8-6162be99ff11) | Answers to frequently asked questions regarding the Home Delivery Order form. |
| **Caremark.com - Forms for Print and Adobe Reader** | [CMS-PCP1-038391 (038391)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0bbf55de-6048-4d78-be0e-e40dde8f724b) | Information on how to assist a member with locating and/or printing forms on Caremark.com. |

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| Fulfillment |

Refer to as needed:

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Fulfillment Requests** | [CMS-2-004595 (004595)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a33eb9f2-234e-4c71-bd84-d64eae88e8af) | Direction that helps determine when a fulfillment request should be processed through Fulfillment automation in PeopleSafe or a manual Resolution Manager Task. |

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| Health Engagement Engine |

Refer to as needed:

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Health Engagement Engine (HEE) Index** | [CMS-PRD1-106189 (106189)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c9265c2b-45b5-4bcf-b292-ba06e9860ef1) | One-stop shop for all your HEE needs. |

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| HIPPA - Health Information Portability and Accountability Act |

Refer to as needed:

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **HIPAA (****Health Information Portability and Accountability Act) Grid - CVS** | [CMS-2-028920 (028920)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce) | Personal and System information that you may or may not perform or provide information depending on your caller type. |
| **HIPAA (Health Insurance Portability and Accountability Act) - Disclosure Reporting and Complaints** | [CMS-PCP1-027852 (027852)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=555c2e42-bed9-4648-91b9-19dc103b0ff1) | Process for handling HIPAA Issue and Disclosure complaints and escalations. |
| **HIPAA (Health Insurance Portability and Accountability Act) Workstation Security, Sending Email or Fax Communications and Complaints** | [CMS-2-026649 (026649)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=15ae96bb-d1a0-4a9f-9356-86a9f47eb996) | Information related to HIPAA to support Workstation Security, proper handling of sensitive information, and how to respond to complaints. |

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| Legal Documents |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Power of Attorney (POA)** | [TSRC-PROD-044584 (044584)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=73866a13-cfa1-4deb-98d5-1373c8dc6cf1) | How to add and revoke a Power of Attorney Authorization form on file with us. |
| **PeopleSafe - Forms Members Can Submit to Authorize Access and Release of Information for Their Account** | [TSRC-PROD-007394 (007394)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=970803bb-c0d8-4180-ae71-a8feab415b65) | Provides information about the types of forms that a member can submit to authorize access to and release of their Protected Health Information (PHI). |

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| Letters |

Refer to as needed:

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Locating Letters Sent to Members** | [CMS-PCP1-038297 (038297)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=31619608-1d27-4a49-8703-0be4dc59827c) | Instructions for when a member calls in regarding a letter that they received. |

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| Medical Foods |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **PeopleSafe - Medical Foods** | [TSRC-PROD-043204 (043204)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=164b984c-6cae-4744-a5f6-1aaa849709cf) | Information and procedures related to handling Medical Foods. |

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| Non-Conformance/Fraud |

Refer to as needed:

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Alleged Nonconformance and Call Pull Requests** | [CMS-2-004622 (004622)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=281be95a-6049-430b-a58d-aa829ad6f11c) | Instructions for handling a claim or incident. |
| **PeopleSafe - Reporting Alleged Fraud CCR** | [CMS-2-007636 (007636)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c7d99a52-ae23-4ff8-a5ea-0bd3d2760015) | Provides procedures to resolve possible fraud cases where our members’ accounts may have been charged due to fraud or other errors. |
| **Transmission of Customer Care Fraud, Waste and Abuse** | [TSRC-PROD-055426 (055426)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=24c4fba5-e15b-4bb6-ba1a-45f07498453c) | Overview and guidelines to Customer Care personnel for sending allegations of potential fraud, waste and abuse to the designated Fraud Waste and Abuse (FWA) program. |

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| Order Placement |

Refer to as needed:

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **PeopleSafe - Prescription (Rx) Refill/Renewal (Order Placement)** | [CMS-2-004628 (004628)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=932f2f09-4581-4c2c-861d-5145ad7ab97a) | Process used when a plan member contacts Customer Care to refill a Mail Order prescription or renew a previous Mail Order prescription. |

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| Order Status |

Refer to as needed:

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Order Status Document Index** | [CMS-PRD1-088294 (088294)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4b4447a3-18f2-4b8e-a229-f2a1fe1a488f) | Contains links to the Customer Care work instructions pertaining to Order Status. |

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| Overrides |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Override Index** | [TSRC-PROD-050481 (050481)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a384094a-ab2d-4b30-ba1b-18a94be0849c) | Document titles, hyperlinks and the description for all documents that pertain to Overrides. |

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| Overseas |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **PeopleSafe – Shipping Guidelines and Fees and Order Tracking** | [CMS-2-004611 (004611)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=49a324cd-73b1-4e49-bdae-9ac58e18d184) | Guidelines to determine the company Home Delivery standards, tracking information, and costs associated with expedited shipping orders. |

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| Paper Claims |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Paper Claim Index** | [TSRC-PROD-042914 (042914)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1f72603c-4632-4e85-8d97-16cb51a3be1f) | List of Paper Claims hyperlinked documents. |
| **Paper Claim Research (Submissions, Locating, Rejections and Reimbursements)** | [TSRC-PROD-059668 (059668)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4e81c6b3-9feb-442a-b625-508abf839729) | Describes the process to follow when determining if a paper claim was received and filed with our PBM including the process of locating, identifying the reason for the rejection, if applicable, and researching the status. |

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| Prescription Transfer |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Rx Transfer Index** | [CMS-2-004726 (004726)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=db939cc1-1f5e-44de-89df-985827477553) | Titles, document numbers, hyperlinks, and descriptions for everything related to prescription transfers. |

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| Prescription Verification |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Prescription Verification** | [CMS-2-008134 (008134)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=524fc0e9-7c7b-4f21-8a43-36a8783b4c50) | Used when a member calls Customer Care to verify how their mail order prescription was filled. |

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| Price Estimate (Test Claim) |

Refer to as needed:

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Test Claims Index** | [TSRC-PROD-046965 (046965)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=772063f7-03f8-400d-a07a-5c7f11d0a10a) | Listing of all the Test Claims documents. |

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| Prior Approval, ePA, IBR (Initial Benefit Review), Appeals |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Compass and PeopleSafe – Prior Authorization, Exceptions, Appeals Guide** | [TSRC-PROD-063978 (063978)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=657ddfe3-27d1-4a21-8f51-8cbd3961001c) | Process steps to ensure agents are determining if a Prior Authorization or Clinical Exception is appropriate, and an index of links to specific Prior Authorization, Clinical Exception, and non-Clinical Exception specific process documents.  **Note:** Most documents associated with this topic are set to be non-searchable in theSource and cannot be changed. Access this document to view many topics with the opportunity to hyperlink to view more information. |

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| Programs |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Client Programs Work Instruction Index** | [CMS-PRD1-061276 (061276)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0609eb74-869f-422a-ba76-d5c3a5b4da40) | Hyperlinks to documents describing the various programs and benefits available to CVS Caremark Clients and their Members. |
| **PeopleSafe - Client Program Offerings Comparison Guide** | [CMS-PCP1-027425 (027425)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b6e05522-5955-4535-ad00-01d20dbe09e8) | Overview and comparison of the different CVS Caremark plan designs |
| **CVS Weight Management Program (Pilot Transition)** | [TSRC-PROD-059686 (059686)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0649ac2e-3b0a-410e-8fd1-7ccbed6e8ee3) | Provides support to members who are eligible for anti-obesity medication (Anti-Obesity Medication) and assists them in living healthier lives while avoiding or optimizing the use of Anti-Obesity Medications. |
| **Health Advisor Program (Medical Cost Avoidance & Site of Care)** | [TSRC-PROD-061330 (061330)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a296b722-c0b8-4816-a2dc-0bf99cf86c64) | Provides information about the enhanced Health Advisor Program including Medical Cost Avoidance & Site of Care |

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| Refill/Renewal |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **PeopleSafe – Prescription (Rx) Refill/Renewal (Order Placement)** | [CMS-2-004628 (004628)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=932f2f09-4581-4c2c-861d-5145ad7ab97a) | Member contacts Customer Care to refill a Mail Order prescription or renew a previous Mail Order prescription. |
| **PeopleSafe - Manual Refill** | [CMS-PCP1-027179 (027179)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=eea92f37-f941-4237-9b9e-af999ad68e8f) | Utilized when the member is unable to place a refill via Website, IVR or if the CCR is unable to fill through the Refill screen. |
| **PeopleSafe - Auto Refill Program (ARP)** | [CMS-PCP1-022387 (022387)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=89a5f1e4-2fea-404a-a5f8-6e50549eb3de) | Process to assist eligible members with Automatic Refill Program. |

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| Refunds/Reimbursement |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **PeopleSafe - Refund** | [CMS-2-010221 (010221)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=89febb33-693a-4e14-9e2c-f13c4935ce26) | Steps to determine why a refund check was issued, and details how to initiate a refund to a member’s account. |
| **Refund Stop Payment Check Reissue** | [CMS-2-004580 (004580)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b529fcee-1566-4001-a703-ce8b63186cb2) | Process when member needs assistance dealing with a check that has been issued and may now need a copy or for it to be replaced. |
| **PeopleSafe – Unclaimed Property/Checks Not Cashed** | [TSRC-PROD-018700 (018700)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0f2c2186-2c53-441a-be44-3d0940df202f) | Steps to use when a caller needs assistance with a Due Diligence or Unclaimed Property (UCP) letter. |

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| Resolution Manager (RM) Tasks |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Resolution Manager (RM) Task Types and Uses** | [TSRC-PROD-029980 (029980)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3438a8ea-9ad1-4c4b-b710-57dab144493c) | RM task type information such as ensuring a task is not in process, turnaround time, uses, hyperlinked procedures and how to create or cancel a task. |

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| Rejections |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Member Unable to Fill Opioid Prescription (Rx)** | [TSRC-PROD-018274 (018274)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6e2fdd2a-a222-4d16-82c1-f7e411d99220) | Provides the instructions of how to process a request when the member is unable to get their opioid prescription filled. |

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| Return Order (RTP-Return to Participant) |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Call Handling - Return to Member (RTP)** | [CMS-2-008384 (008384)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ea8d8c94-3850-4ec6-9f77-8b579abea68b) | Process for when a member questions why a prescription was returned and how to verify if a prescription was returned to the member. |
| **Return Order Request (Formerly Refund Copay Credit/Mail Tag Request)** | [CMS-PRD1-060206 (060206)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7b80562c-60b7-4616-b431-c0a481c4c9cb) | Provides instructions for when a member requests to return an order or medication received through Mail Order service. |

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| Shipping |

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| **Title** | **Content ID #/ (last 6 digits)** | **Description** |
| **PeopleSafe - Order Shipping Turn Around Time (TAT)** | [TSRC-PROD-018691 (018691)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3338f261-4696-4e84-9019-43cc2eef3352) | Information related to the time it will take to process a prescription. |
| **PeopleSafe - Shipping Guidelines, Fees, and Order Tracking** | [CMS-2-004611 (004611)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=49a324cd-73b1-4e49-bdae-9ac58e18d184) | Guidelines to determine the company Home Delivery standards, tracking information, and costs associated with expedited shipping orders. |

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| Specialty |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **PeopleSafe - Specialty Pharmacy (CTS - Caremark Therapeutic Pharmacy Services) Call Handling** | [CMS-2-007148 (007148)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=2eb2f621-bbbb-4e0e-9189-6b47d44f42b3) | Procedures when handling requests for CVS Specialty Pharmacy, commonly known as “Specialty Pharmacy.” |
| **PeopleSafe - CVS Specialty CoPay Plan Design Strategies** | [CMS-PRD1-113263 (113263)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=40a923d2-74fb-47db-8ae6-d150fcb77e1f) | Information about the CVS Specialty Copay Plan Design Strategies, True Accumulation and the PrudentRx solution and varies by client. |
| **CTS Specialty Drug List** | [CMS-5-005035 (005035)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4285ff10-756a-437f-8415-0cd84e7e98b4) | CTS Specialty List updated throughout the year |

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| Vaccines |

Refer to as needed:

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **PeopleSafe - Retail Pharmacy Vaccine & Flu Shot Administration** | [CMS-PCP1-040512 (040512)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c7ac0f02-7365-4ce0-8878-2a55d3b91cb5) | Process to determine if a client offers vaccine coverage through this program and the cost to the member |
| **Vaccines** | [TSRC-PROD-008966 (008966)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=442488f7-4aaf-4f47-b1bf-97809946f909) | Downloadable Excel sheet with information about common vaccines for test claims |

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| Related Documents |

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| **Title** | **Content ID # / (last 6 digits)** | **Description** |
| **Compass and PeopleSafe - General Resolution Times/Turn Around Times (TAT) and Related Documents** | [CMS-2-028775 (028775)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=863acba1-4370-4da9-9f6b-4cadf8633fbf) | General Resolution Times/Turn Around Times for various types of processes and requests along with related documents. |
| **PeopleSafe - Botox No Longer Dispensed by CVS Health (Specialty Pharmacy, Home Delivery/Mail Order or CVS Retail)** | [TSRC-PROD-042758 (042758)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=992ad7cf-40fb-4614-ac47-759e666a853f) | Use when a member calls regarding a rejection or letter about CVS Specialty not stocking or dispensing Botox. |
| **PeopleSafe Manufacturer Coupons** | [CMS-2-004784 (004784)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=43587366-52c2-46d9-97cc-06c649e45152) | Mail Order process when responding to questions regarding manufacturer coupons. |
| **Drug Pronunciations** | [CMS-PRD1-066717 (066717)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0e1ce673-08c2-479c-a09b-acb5f10c779a) | Pronunciation of drug names used in the pharmacy environment. |
| **Customer Care Abbreviations, Definitions, and Terms Index** | [CMS-2-017428 (017428)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c1f1028b-e42c-4b4f-a4cf-cc0b42c91606) | index for abbreviations, terms, and definitions |
| **Member Cannot Afford Medication (Alternatives and Financial Assistance)** | [CMS-PCP1-026963 (026963)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=62aa67ac-8298-4fa1-b1ba-fda383d15b4c) | Use when a member states that they are not able to afford the cost of a prescription. |
| **Incoming Artificial Intelligence (AI) Calls to Customer Care (Automated or Computer Calls)** | [TSRC-PROD-059690 (059690)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bb0302e9-28d0-4455-b6eb-26c603fbaa3c) | Incoming calls increasingly utilizing Artificial Intelligence cannot be used for authentication or to obtain member information. |

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