**To:** PBM Customer Care Team

**From:** Customer Care Leadership Team

**Subject:** Plan Benefit Override Access

Although you may not be familiar with all clients, it is imperative that you use the following resources to ensure PBOs are authorized by each client’s plan.

* **Client Information Form (CIF) –** Look up the Override section in the client’sCIF located in TheSource to ensure Care has authorization to enter the PBO and to verify the client’s guidelines, e.g. one time exceptions for refill restrictions.
* **Work Instructions –** Follow the processes documented within all PBO-related work instructions.
* **Announcements –** Check for any announcements in TheSource for situations related to natural disasters or client specific directions.
* **Comment Type - One Time Exception –** Verify the member’s comments to be sure no other exceptions were made on their behalf.
* **If at any time you are unsure of the information provided in any of your resources please submit a PBO task to be worked by the offline support teams.**

Customer Care Reps:

* CCRs will enter only the override types authorized within the relevant TheSource work instructions.

Senior Team Reps:

* The Account Manager must be consulted to obtain approval for any override not noted in the CIF.These authorizations must be obtained through e-mail. Verbal approvals are acceptable provided an e-mail approval follows. It is the end-user’s responsibility to maintain e-mail approvals for potential audit.
* When a member contacts PBM after normal Account Management business hours, on the weekend or holiday and the following conditions exist: 1) PBM is unable to get medication to the member the next day; 2) member is currently out of medication; 3) member is unable to pay out of pocket for the medication; consult with your leader to authorize the override if all alternatives have been exhausted. If the override exceeds $250.00 a Director’s approval is required.
* The authorizing leader is responsible to send an email to the Account Manager alerting them of the override and the Account Manager will follow up with the client. All member accounts must be documented with comments when the CIF guidelines require an Account Manager or Client approval.

This role carries a very important responsibility, requiring utmost integrity and confidentiality. If you notice a potential case of fraud or abuse on behalf of a member or colleague report it to your leader immediately. **Leaders** – please report any potential cases of fraud or abuse to Account Management.

PBM has a fiscal responsibility to our clients and will be held accountable for any client charges in cases where PBOs are entered in error. Periodic audits will be conducted to ensure all PBOs were entered appropriately. All Care users given PBO access are accountable and subject to disciplinary actions if the outcome negatively impacts our clients.

Your signature is an acknowledgment that you understand the above policy and agree to comply with all of its content.

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|  | End-user: Print Name |  | Leader: Print Name |  |
|  |  |  |  |  |
|  | End-user: Sign and Date |  | Leader: Sign and Date |  |

Include the completed scanned attachment of this form and the Policy and Procedure system IT-001 User Request Form then send to: Identity Access Management.