# PeopleSafe - When to Transfer Calls to Clinical Care

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**Description:** Details the process to handle a clinical inquiry from a member. It is designed to clarify when CCR’s should take ownership of a member call and when they should transfer calls to Clinical Care Services (CCS).

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| Hours of Operation |

Do notprovide the Clinical phone number to the member at any time. All member calls should be directed through Customer Care.

**Hours of Operation:**

* **Monday – Friday** 
  + Clinical Counseling: 7:00 am – 7:00 pm CT
  + Real Time Rx Transfer: 7:00 am – 7:00 pm CT
  + Bridge Supply: 7:00 am – 7:00 pm CT
* **Saturday**
  + Clinical Counseling: 7:00 am – 4:30 pm CT
  + Real Time Rx Transfer: 9:00 am – 4:30 pm CT
  + Bridge Supply: 7:00 am – 4:30 pm CT
* **Sunday**
  + Clinical Counseling: 9:00 am – 6:00 pm CT
  + Real Time Rx Transfer: 9:00 am – 6:00 pm
  + Bridge Supply: 9:00 am – 6:00 pm CT

**HIP (Hawaii) Clinical Hours of Operation:**

* Monday – Friday: 8:00 am – 5:00 pm HT

**Note:** For all offices, holiday hours may vary from those listed above.

 If after hours, refer to [Clinical Counseling Pharmacist After Hours Process (025502)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=11046d79-1420-4e0e-b312-affdbc9efa9a).

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| Call Types Handled by the CCR |

The first resource for assistance should be the Senior Team or a Supervisor. A call to Clinical Care Services should only be made when the call is clinical in nature.

* **Order Status/WIMO (Where Is My Order)**

**Note:** Order Status inquiries can only be addressed by Customer Care; Clinical cannot answer Order Status inquiries. Refer to [PeopleSafe - Order Status (004758)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=684a02bb-9cb0-473d-9b90-56fc922c1ed6) and reference Order Status, Interpretation of Order Status Details, Order Status Research Tips, and Order Status Reference Table sections.

**Reminder:** Questions you are unable to resolve regarding Order Status should be directed to Senior Team or a Supervisor.

* **Order Conflicts**
* Do not contact Clinical Care Services for non-clinical conflicts (**Examples:** AAD, CCA, CCP, CTS, EA, ELG, FRM, FRP, MDB, PAF, PAR, PLN) as they will not be able to speak to the outcome of the conflict.
* It may be appropriate to engage Clinical Care in cases where an order is changed or placed on a [Delayed Prescriber Response/Prescriber Requests Holds (023699)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0df7701a-8e8e-402b-8041-d21ce4828e44) as a result of clinical divert.

**Examples:** Reasons you may need to call Clinical Care for clinical diverts include, but are not limited to:

* + Resolved Interventions diverts
  + Drug Allergy alerts
  + Drug Age Precautions
  + Drug Gender diverts
  + Drug Requires Diagnosis
  + Drug to Drug Interaction
  + Drug/Medical Condition
  + Therapeutic Duplications aka Duplicate Therapy00439

**Note:** Duplicate Therapy caused by “Too Soon to Refill” is handled by CCR.

* + Low and High Dose alerts
  + When the member was expecting one thing but received another

**Examples:**

* + Member was expecting insulin pens but received vials
  + Member was expecting 180 tabs but received 90 tabs (This could indicate an error with the Rx directions.)
  + Prescription should be for twice a day instead of once
* [Compass – Search for CVS Retail Inventory (Drug Shortage / Out of Stock) and View Claim Details (RxConnect) (066768)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c10d717e-f397-4f10-8fb6-3731cd856f5c) **or Not in stock or Not in system (NIS)**

**Note:** CCR cannot assist with CarelonRx/AHD mail order stock inquiries. CCR would need to reach out to AHD Pharmacy.

* [Compass – Member Unable to Locate Medication at Mail Order or Retail (Back Order, Shortage, Not in Stock - NIS) (065451)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=47f1fc7c-d771-45ae-9de3-179ac312f222)
* Balance Adjustments/Payments (Does not include AME adjustments). Refer to [PeopleSafe - Balance Transaction History/Payment Dispute (Mail Order Claims Only) (004578)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ba2c70ed-7f0c-4779-98b6-9bc1eb9bbb1f).
* [Bridge Supply Short Term Prescription (Rx) Refills (017906)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0d316a1d-f02d-4849-9b36-eb56a6ce9b57) Validation
  + For Bridge Supply, calls should be warm transferred to **1-866-234-0457** (internal number, do not disclose).
* [PeopleSafe - Bulk Up Rules CCR (030449)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=e92bf2fd-2808-48f6-bb6d-fd22f0077735)
* [Call Handling - Return to Member (RTP) (008384)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ea8d8c94-3850-4ec6-9f77-8b579abea68b) and [PeopleSafe - Discontinue (Cancel or Stop) Prescription (008895)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6a069336-d84a-435d-97be-49eaccd5ab77) **-** Handle calls concerning the following topics:

 The following issues should **not** be transferred to Clinical:

* + Plan Design
  + Managed Drug List
  + Eligibility/Payment
  + Prior Authorization Status
  + Too Soon To Fill
  + Future Fill
* [PeopleSafe - Cancel Order or Prescription Refill or New Prescription (004761)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=c67b914f-1f29-4331-9bf1-d79214260f5f)
* [Compass - Prior Authorization, Exceptions, Appeals Guide (063978)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=657ddfe3-27d1-4a21-8f51-8cbd3961001c)
  + For Med D refer to [MED D - Coverage Determinations and Redeterminations (Appeals) Landing Page (004825)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1e7d7ad7-e1c1-4fa1-8258-215a1c0ff32b).
  + Prior Authorization questions should **NOT be transferred** to Clinical Care services. For PA questions, follow the appropriate PA procedure or contact Senior Team.

* Controlled Substance State Laws
* For further information on state laws that may impact their prescription, warm transfer the member to Clinical Care Services Clinical Counseling. Refer to [Phone Numbers (Contacts, Departments, Directory, Addresses, Hours, and Programs) (004378).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f22eb77e-4033-4ad9-9afb-fc262f29faad)
* Copay or Coverage Questions
* Damaged Orders – refer to [Order Reships (038651)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1d44c6bc-e5ba-4f93-b5ab-0b733ad871d6)

**Notes:** Request a reshipment of crushed or broken tablets/capsules without contacting CCS and if the member does not have questions regarding the safety or stability of the prescription within the order in question.

* If the member is questioning the safety or use of the order, Care should warm transfer to Clinical Care Services.
* If the Member has a question as to the stability of the order from a temperature standpoint (**Example:** Too hot or too cold), warm transfer to Clinical Care Services.
* Drug Coverage/Price Estimates, refer to[PeopleSafe - Test Claim (004573)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=59c4e7fa-4a87-43c4-89cd-5d4f8c6c3421), Test Claims Brand or Generic Alternatives by GPI
* [PeopleSafe - Handling Maintenance Choice Calls (021863)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e0d014db-0726-40a1-bf1b-c48f9fbdabb3) Validation
  + MChoice Rx Transfers for CVS Pharmacies Only: **1-866-234-0196** **– Option 2**
  + Non-CVS, Non-MChoice Rx Transfers: **1-866-241-7414** (CCRs may provide this number to the Pharmacy)
* Formulary Questions and Alternatives - Must provide Disclaimer when [Providing Potential Prescription Alternatives](#_Providing_Potential_Prescription)

**Note:** If the nature of the call becomes clinical, such as the member having an inquiry related to drug ingredients, potential adverse effect(s) of the alternatives, complete the call by providing the names of the alternative medications, drug coverage and copay information prior to transferring to Clinical Care.

* [Intervention Changebacks (004594)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=92f4cbaf-20a3-4f57-a897-7b2f9f1b4f36) in Process
* Managed Drug List
* [Order Reships (038651)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1d44c6bc-e5ba-4f93-b5ab-0b733ad871d6) (LIT/Reships)
* [Participant Hold (027254)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=76ff600a-8205-4ae2-82c0-cf3d007af90c)
* Plan Design and Plan Design Issues

* [PeopleSafe - Resolution of Eligibility Issues (004587)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=ad278185-117d-433f-bdc2-9327b93c1944)
* Prescription Quantity Shorted – Refer to [Order Reships (038651)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1d44c6bc-e5ba-4f93-b5ab-0b733ad871d6)
* [PeopleSafe - When to Transfer Calls to Participant Services (051206)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=b5a38f4f-50c0-4df1-bcc3-88187af8c2b1)

**Note:** For any Participant Services (PSC) conflicts, transfer to that business area as Clinical Care cannot resolve.

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| Providing Potential Prescription Alternatives (Customer Care Disclaimer) |

To ensure that members, and their prescribers, understand that Customer Care’s purpose for advising of prescription alternatives is strictly related to helping members understand how to maximize their benefits and understand what potential drugs are covered under their plan, we have developed the following disclaimer.

This disclaimer is to be used by Customer Care representatives providing potential prescription alternative medication information to members. A Customer Care conversation regarding alternative medications should include:

 Based upon your plan design, our system indicates that there is a more cost-effective alternative medication for the medication you are currently taking, Zocor. Are you interested in exploring prescription alternative medications with your prescriber that might result in a cost savings to you?

 Before I disclose the name(s) of the alternative prescription medications, please understand that I am a Customer Care Representative, not a pharmacist, and I am only informing you of this (these) potential alternative medication(s) because you may save money under your plan.

**DISCLAIMER**

 This (these) potential alternative medication(s) must be discussed with your prescriber because it is possible that the alternative medication(s) may not be appropriate for your specific condition. Only your prescriber can make that decision.

 If you would like to discuss this (these) alternative medication(s) in relation to your condition now, I can connect you with Clinical Counseling to review that information.

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| Transfer Calls to Clinical Process |

**Note:**If the plan member is complaining of chest pain, severe discomfort, or a life-threatening drug reaction and cannot wait for a pharmacist, advise them to immediately call their local emergency response unit **(911)**.

A call to Clinical Care Services should only be made if the CCR is able to determine, with certainty, that the call is clinical in nature.

Clinical Care calls should be warm transferred to **1-866-251-3591** (internal number, do not disclose).

**Note:** Hawaii’s Clinical Care calls should be warm transferred to **1-877-418-4130** (internal number, do not disclose).

* Option 1 – Pharmacy Help Desk
* Option 2 – Mail Order, Clinical and FastStart departments

 Review for client-specific process, if applicable.

Resolve Care related issues.

**Note:** All calls that are clinical in nature should be warm transferred for clinical assistance by referring to [Clinical Call Types](#ClinicalCallTypes) chart below. Complete the transfer and release the call. Log and document the call as appropriate.

**** Prior to any warm transfer, ensure clinical is open by referring to their [hours of operation](#_Hours_of_Operation).

 If the member is a PBM employee, read this disclaimer prior to warm transferring:

**** Please be aware that our pharmacists on call are <brand> employees, and if I transfer you to a pharmacist on call, that <brand> employee will have access to your personal health information and will know of your medical condition. I can assure you that the pharmacist on call and other <brand> employees who provide services to <brand> plan members are required and agree to keep any personal information they learn in the course of providing their services strictly confidential, and so your privacy will be protected. Would you like me to transfer you to a pharmacist on call?

 Is there anything else that I can assist with before transferring you?

**Reminder:** Whenever possible, Customer Care should complete Care-related requests prior to calling Clinical Care Services.

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| **Clinical Call Types** | **Refer to the following documents before transferring:** |
| Bridge Supply | [Bridge Supply Short Term Prescription (Rx) Refills (017906)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0d316a1d-f02d-4849-9b36-eb56a6ce9b57) |
| Changeback Requests | [Intervention Changebacks (004594)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=92f4cbaf-20a3-4f57-a897-7b2f9f1b4f36) |
| Clinical questions from doctors’ offices | [Handling Doctor and Prescribers Phone Calls (018350)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=99045020-7de5-4713-8c66-edad7ef3f200) |
| Compound Clinical Inquiries  Due to guidelines issued by the USP, Home Delivery pharmacies do not fill compound prescriptions as of March 1, 2019. | [PeopleSafe - Handling Compound Calls - Care (022684)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9c243979-a697-4afb-90b8-7c1fcc1f4568) |
| Controlled Substance Law Inquiries | * [PeopleSafe - Controlled Substance Information (C2-C5) (067214)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=dc09fa82-fcf6-495a-ae85-50cd798c6815) * [Controlled Substance State Laws (004776)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=10965139-fc1c-42f6-92ac-7933d76a9117) |
| Defective Products | Refer to **Defective Products** section of [Order Reships (038651)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1d44c6bc-e5ba-4f93-b5ab-0b733ad871d6) |
| Drug Recall Process | If the member would like more information about the recall itself of their Mail Order prescription, warm transfer to Clinical. If the member is needing to start the recall process for a Mail Order prescription, please refer to [PeopleSafe - Medication Recall & Replacement (020095)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=707dbcfd-76e8-4ba4-84cd-5fd01169fa97). Otherwise, they should contact the pharmacy that filled their prescription for more information on that pharmacy’s recall process. |
| Duplicate Archive Error | **Note:** Review the Member level comments. If found, assure the member that their prescription has been received from the prescriber, and we will work to get it to them as quickly as possible.  Contact [PeopleSafe - Clinical Care Services (024833)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ff2706a9-6f42-4ccd-87e1-59cb2ce103a8) to request a rescan of the archived prescription. Refer to [Identified as Duplicate Archive Error CCR (005029)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=39ef0fd5-2019-4597-8694-5ef9b14e3b85). |
| FDA Regulations of Pharmaceuticals | N/A |
| Foreign Sourced Medications | N/A |
| Ingestion of wrong (incorrect) medication | * [Member Counseling by Pharmacist (Clinical Inquiry) (004570)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=58362b74-6843-4fae-a65d-24a2b0b812e3) * [Clinical Counseling Pharmacist After Hours Process (025502)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=11046d79-1420-4e0e-b312-affdbc9efa9a) |
| Instructions for disposing of medication/Expiration concerns | [Discard Date/Expiration Date Inquiry (004582)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=dd8f17fd-3045-4599-9d41-8545884bf5fa) |
| Medication Recall | [PeopleSafe - Medication Recall and Replacement (020095)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=707dbcfd-76e8-4ba4-84cd-5fd01169fa97) |
| Member Requests to speak with RPh (Pharmacist)  **Examples:**   * Brand vs. Generic Differences (No price quotes) * Drug Interactions * Medication Usage (Missed a dose, taken more than prescribed dosage, etc.) * Side Effects/Adverse Reactions * Storage/Stability/Temperature | * [Member Counseling by Pharmacist (Clinical Inquiry) (004570)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=58362b74-6843-4fae-a65d-24a2b0b812e3) * [Clinical Counseling Pharmacist After Hours Process (025502)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=11046d79-1420-4e0e-b312-affdbc9efa9a)   CVS Caremark Pharmacist can consult on all medications retail or mail order including but not limited to OTC products.  If calling about a Specialty medication, warm transfer to Specialty Pharmacy (1-800-237-2767) for a pharmacist consultation.  If regarding a recall medication filled locally, refer to the local Pharmacy. |
| NDC Numbers  **Example:** Issue is locating an Active NDC Number | [Inactive NDC (022377)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e8ae12f9-7004-49d0-b6c0-a6c2151a0993) |
| OTC drugs and Nutritional Supplements | [Over the Counter (OTC) Health Solutions (045610)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=23106c01-cf42-4b22-8c20-6bb6d370659a)  [Member Counseling by Pharmacist (Clinical Inquiry) (004570)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=58362b74-6843-4fae-a65d-24a2b0b812e3)  [Clinical Counseling Pharmacist After Hours Process (025502)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=11046d79-1420-4e0e-b312-affdbc9efa9a) |
| Pharmaceutical Supply Chain Safety | N/A |
| Prescription Transfers | [Rx Transfer Index (004726)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=db939cc1-1f5e-44de-89df-985827477553) |
| Product (medication/pill) Identification  **Examples:** Colors/Shape of Prescription, Manufacturer or NDC numbers | Warm transfer the call to Clinical – refer to [Phone Numbers (Contacts, Departments, Directory, Addresses, Hours, and Programs) (004378)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f22eb77e-4033-4ad9-9afb-fc262f29faad). |
| Requests for Specific Generic Manufacturer | [Requests for Specific Generic Manufacturer In and Out of Stock Process (059539)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=11e1c2cf-37f3-40b7-a948-48edf8c18f55) |
| Request to return a medication or receive a refund  **Note:** Review the referenced work instruction for all scenarios to determine if the call should be transferred to clinical or senior team.  **Examples** of clinical related:   * Alleged Doctor Error * Member Deceased * Non-Conformance – Clinical Error   For the following clients listed below, we are unable to provide the Alleged medical error (AME) credit:   * FEP * GEHA * 3M * ERS * WellCare * MED D (including SilverScript * Wells Fargo – MED B * Aetna Med-D * Bank of America | * [Return Order Request (Formerly Refund Copay Credit/Mail Tag Request) (060206)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7b80562c-60b7-4616-b431-c0a481c4c9cb) * [Compass and PeopleSafe – Transferring Calls to Dedicated Client Teams (062992)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4c87518d-83f5-4884-8631-1f427b77da7d) |
| Request to change the language on medication bottles that have already shipped | [Special Dispensing Instructions ScripTalk, Braille, Large Font and Signature (008618)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=fe97f023-d5aa-4578-ad84-b0e4e7b58b92) |
| Prescription Verification/Interpretation:   * Member name * Medication name, strength, directions, quantity, refills, DAW * Prescriber name, date written * Order mailed to wrong member | * [Prescription Verification (008134)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=524fc0e9-7c7b-4f21-8a43-36a8783b4c50) * [Alleged Switched Labels on Medication (004740)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a5b036eb-8c22-41ff-8072-db617951abcd) |
| Returned to Participant (RTP) and Discontinued Prescriptions as a result of the following:   * Drug – Drug interaction * Duplicate Therapy * High Dose Alert * Drug/Medical Condition * Allergy Alert * C-2 Protocol | [Call Handling - Return to Member (RTP) (008384)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ea8d8c94-3850-4ec6-9f77-8b579abea68b) |
| Splitting (Separating/Reducing) Mail Order Pre-packed prescriptions (**Example:** Insulin, gels, or liquids).  Calls from a member who received their prescription, but the Day Supply of the medication was less (reduced) than expected due to the medication being pre-packaged. | Warm transfer the call to Clinical – refer to [Phone Numbers (Contacts, Departments, Directory, Addresses, Hours, and Programs) (004378)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f22eb77e-4033-4ad9-9afb-fc262f29faad). |
| Therapeutic Equivalents | [PeopleSafe - Test Claim (004573)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=59c4e7fa-4a87-43c4-89cd-5d4f8c6c3421) |
| Updates to a patient profile for Allergies or Health Conditions only | Warm transfer the call to Clinical – refer to [Phone Numbers (Contacts, Departments, Directory, Addresses, Hours, and Programs) (004378)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f22eb77e-4033-4ad9-9afb-fc262f29faad).   * If member is calling about medication filled locally, refer to the local pharmacy. |

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| Related Documents |

[Log Activity/Capture Activity Codes (005164)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bdac0c67-5fee-47ba-a3aa-aab84900cf78)

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

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

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