**PeopleSafe - Viewing Prior Authorization (PA) and Clinical Exception Information**

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**Description:** Explanation including screenshots for how to view Prior Authorization (PA) and Clinical Exception Status in PeopleSafe. Also includes Information on the Plan Benefit Override tab and PA Details Screen.

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| Viewing PA Status |

**Reminder:** Review the CIF to ensure we handle the PA/Clinical Exceptions for the client.

Perform the steps below to review the PA Status:

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| **Step** | **Action** | |
| **1** | From the Main Screen in PeopleSafe, click **View Comments** and **View Activity** to review the notes on the member’s account. Look for “CMM” and “ePA” to determine if an ePA request has already been submitted by Customer Care.  Before the prescriber responds to the ePA request, it will NOT appear in on the **View PA Status** screen. You must review the **View Comments** screen for notes on the member’s account.  **Reminder:** Agents should begin Call Documentation notes with “CMM” when you create an ePA in CoverMyMeds (CMM) so that it is easily identifiable on the View Comments screen. | |
| **2** | From the Main Screen, click the Plan Benefit Override button tab to view a list of Overrides and PA Actions.  The following information may be identified on this screen:   * Drug Type/Number/Description * Effective Date * Expiration Date * Agent who entered authorization * Reason Code * Last Updated Date * Incident (if any)   **Note:** Many of these columns can be sorted to assist with locating the appropriate PA. | |
| **3** | Once the member provides the drug name and appropriate drug in question is identified, select the radio button of the drug and then select **View PA Status**.     * If the Prior Authorization contains wildcard numbers (\*\*) within the GPI as shown above, it will cover multiple strengths of the medication. This does not apply to medications with quantity limits. If the member has further questions or concerns regarding prior authorizations for more than one strength of a medication, warm transfer the member to the Prior Authorization Department. See [Phone Numbers (004378)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f22eb77e-4033-4ad9-9afb-fc262f29faad). * If a drug is not listed, or effective/expiration dates are not visible, the Prior Authorization may be pending.   **Result:** The PA status screen displays. The following information may be identified on this screen: | |
| **Field** | **Defined** |
| **Status** | Advises if request is Open or Closed |
| **Prior Authorization Number** | Provides the number assigned to the PA by the CAS system |
| **Create Date** | Advises the date the request was created |
| **Drug Name** | Provides the name of the drug needing the PA |
| **Activity Date** | Provides the date of the last activity |
| **Last Activity** | Describes the last activity (fax sent successfully, approved, denied, closed, no response) |
| **Resolution** | Advises of the decision made on the PA |
| **Approval Form** | Provides the date the approval began |
| **Approval Thru** | Provides the date the approval expires |
| **Approval Reason** | Provides details as to why the PA was approved |
| **Denial Reason** | Provides details as to why the PA was denied. Refer to [Appeals (007339)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cd7126d2-19b7-4743-913c-8e9dd7329c08). |
| **Notes:**   * If pending approval, then advise member to call their prescriber for updates. * If a third party calls to get information about a PA status, refer to [HIPAA Grid (027852)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=555c2e42-bed9-4648-91b9-19dc103b0ff1) for information that can be released. | |
| **4** | Determine the PA status.  Refer to [PeopleSafe – Status of a Prior Authorization or Clinical Exception (059542)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=73f474f3-70d9-45be-9a56-e4a0b42fc181) for steps on advising member of status and next steps.  **Reminder:** PA Status details display in a member-friendly description format.     * Select the radio button to get further details of the status of the PA (for Commercial, Medicaid, and Medicare D accounts).   **Note:** The chart below outlines the difference statuses that will display. | |

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| Viewing Clinical Exception Status |

Clinical Exceptions will not display on the PA Status page. However, they will be entered as longer-term PBOs on the PBO page. View the PBOs on the member’s account (ensure you are viewing the correct member) for the drug they had requested the Clinical Exception.

**Note:** The drug may be listed as the generic name though the member may give you the brand name. The drug may be listed as the generic name even if a generic is not yet available.

**Reminder:** Review the CIF to ensure we handle the PA/Clinical Exceptions for the client.

Perform the steps below:

|  |  |
| --- | --- |
| **Step** | **Action** |
| **1** | From the Main Screen in PeopleSafe, click **View Comments** and **View Activity** to review the notes on the member’s account. Look for “CMM” and “ePA” to determine if an ePA request has already been submitted by Customer Care.  Before the prescriber responds to the ePA request, it will NOT appear in on Plan Benefit Override screen. You must review the **View Comments** screen for notes on the member’s account.  **Reminder:** Agents should begin Call Documentation notes with “CMM” when you create an ePA in CoverMyMeds (CMM) so that it is easily identifiable on the View Comments screen. |
| **2** | From the Main screen, click the Plan Benefit Override button tab to view a list of Overrides (including Clinical Exceptions) and PA Actions.  The following information may be identified on this screen:   * Drug Type/Number/Description * Effective Date * Expiration Date * Agent who entered authorization * Reason Code * Last Updated Date * Incident (if any)   **Note:** Many of these columns can be sorted to assist with located the appropriate Clinical Exception.     * If the Clinical Exception contains wildcard numbers (\*\*) within the GPI as shown above, it will cover multiple strengths of the medication. This does not apply to medications with quantity limits. If the member has further questions or concerns regarding Clinical Exceptions for more than one strength of a medication, warm transfer the member to the Prior Authorization Department. See [Phone Numbers (004378)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f22eb77e-4033-4ad9-9afb-fc262f29faad). * If a drug is not listed, or effective/expiration dates are not visible, the request may be pending. |

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| Using the Plan Benefit Override Tab |

This information is used for troubleshooting claim information, especially if the claim is adjudicating against an established PA or Clinical Exception.

Refer to the following to view details using the Plan Benefit Override Tab:

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| --- | --- | --- |
| **Step** | **Action** | |
| **1** | Select the Plan Benefit Override button tab.  **Note:** The PBO tab in PeopleSafe will appear gold if there is an expiring opportunity. | |
| **2** | Select the radio button next to the PBO in question. | |
| **3** | Click the following buttons as needed to access the additional information about the PBO.    Refer to the following: | |
| **Button** | **Information Displayed** |
| **Edit Optional Fields** | Displays specified values for the days and the quantities approved for the drug selected.  **Note:** Drug limitation hyperlink can be found here. For more information, refer to [Quantity Versus Time Limit (QVT) (021696)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=81832d97-2dbd-48dc-b545-8a413e55450d). |
| **Prices** | Displays information if pricing edits were added to the PBO.    **Note:** If no special pricing was added, a pop-up box displays: “Price list is not available for override”. |
| **Notes** | Displays notes added to the PBO, usually indicating why the PBO was entered. |
| **View Claims** | Displays the claims associated with the PBO. |

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| Using the PA Details Screen |

This is used to access the PA Details screen form the Prescription Details screen when viewing a prescription in “All Claims” mode only. This method provides specific details regarding the PBO applied to the selected claim.

Perform the steps below:

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| **Step** | **Action** |
| **1** | Select the **Override Type/ID** hyperlink on the Prescription Detail screen.    **Result:** Prior Authorizations Details screen displays. |

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| Related Documents |

[Prior Authorization, Exceptions, Appeals Guide (063978)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=657ddfe3-27d1-4a21-8f51-8cbd3961001c)

[Customer Care Abbreviations, Definitions, and Terms (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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