# PeopleSafe - Transfer Existing Rx to New Account (Carrier-to-Carrier/Open Rx Transfer)

[Process](#_Toc145312471)

[Possible Errors and Actions](#_Toc145312472)

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**Description**: Steps for functionality that was created to automate the process for transferring open refills from the member’s previous PeopleSafe account with us to a new account with us.

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| Process |

Use when a member needs to transfer remaining refills between PeopleSafe profiles, or from their former Client or RX Group to their new carrier. This is a Mail Order Rx that has not expired, and which has refills available can be transferred, regardless of whether the former PeopleSafe profile is Eligible/Not Eligible.

This Rx transfer process does not apply to controlled substances (C2-C5). If eRx’s are voided then the chain is broken, this cannot be reactivated (for the Rx to remain DEA compliant for eRx’s).

**Examples:**

* Commercial to Commercial
* Our Commercial account to Med D account
* Med D account to Med D

**Note**: The Account that prescriptions are being transferred to must have active eligibility. Prescriptions that are excluded such as controlled substances may not be transferred.

 Arkansas, Nebraska, New York, Puerto Rico, and Utah cannot transfer prescriptions to other states, a new prescription is required.

 For **authenticated** third party callers:

* May transfer Rx’s, place orders, and speak to order status for medications the caller can verify.
* May Not speak to the member’s specific Rx #s or names without the caller firstverifying the drug name or Rx number for each medication.

When the member is requesting an open refill to be processed from one account to another, follow these steps:

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| **Step** | **Action** | |
| **1** | Ask the member if they have a certain Rx number that they want to transfer from their previous account.   * If they do not have the Rx number available, [search, find and view (027257)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=57660ff2-9cac-4009-8267-7231e754b512) their **OLD** profile.   **Note**: To view inactive/termed accounts, select the **Eligibility Filter** radio button for **Inactive** or **All**. | |
| **2** | Once the inactive/termed profile is located, access the PeopleSafe **Main** Screen, click **Order Placement**, and note down Rx numbers for use in the following steps. | |
| **3** | Exit the old profile, making sure to log your activity, then access the member’s new profile. | |
| **4** | From the **Main Screen** of the member’s **new** account**,** select the appropriate family member for whom the prescriptions are to be transferred.  **Example**: Father is calling to transfer prescriptions for the minor child. | |
| **5** | Click the **Order Placement** button.  **Notes:**   * Hold Indefinite (member or our request) prescriptions do not transfer to new vendors when the client/plan has been terminated. This includes from our plan to our plan & client changes. * Place Rx on [participant hold indefinite (027254)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=76ff600a-8205-4ae2-82c0-cf3d007af90c) when transferring through the manual refill task. | |
| **6** | Select **Transfer Refills.** | |
| **7** | Enter the **Rx Number** from the old PeopleSafe accountand click **Search.** | |
| **8** | The screen displays a “Transfer From” section. Verify the following information:   * Member’s complete name including their middle initial * Gender * Date of Birth * Previous and the new client’s name   Compare the “Transfer To” to the “Transfer From” section to validate if this is the same member. | |
| **If the “Transfer To” and the “Transfer From”…** | **Then…** |
| Match | Select the **Continue** button and proceed to next step. |
| Do **not** match | The transfer cannot be completed automatically.  **Do Not continue.**  **Possible Errors:**   * Non match Rx Number (Cannot locate Rx # on any commercial account) * Date of Birth Does Not Match, Can Not Continue.   Skip to [Possible Errors and Actions](#_Available_Task_Types) section below. |
| **9** | The system displays all Open Refills which are available to transfer from the old profile and the system automatically checks all the refills.  Once you transfer one prescription automatically, the system automatically transfers all the members’ eligible prescriptions that have open refills from the old profile to the new.  Complete appropriate scenario: | |
| **If…** | **Then…** |
| No open refills display on the Refill Transfer screen without a pop-up message | There is a system error.  Create an RM Task and include the following information:   * **Task Category:** Order Placement * **Task Type:** Refill Request – Manual * **Queue:** Order Placement – Participant Services * **Notes:**  Include all Member ID’s * Turnaround Time: Up to 5 business days. |
| Open refills display | Proceed to the next step. |
| **10** | Select **Transfer** to transfer all prescriptions to the Refill Request screen. | |
| **11** | Select **OK** to verify the transfer. | |
| **12** | Select **Close**.  **Result:** Refills display on the normal **Refill Request** screen.  **Note**: If the prescriptions do not show up after selecting Close, close out of the account and reopen before proceeding to [Possible Errors and Actions](#_Available_Task_Types). This will sometimes result in the prescriptions populating.  Transferred prescriptions are not displayed on Caremark.com until they have been filled under the new account.Members must contact Customer Care to request the first fill of the new prescription. Once filled and shipped, the prescription will be available for the member to refill online going forward | |
| **13** | Continue with the standard [Prescription (Rx) Refill/Renewal (Order Placement) (004628)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=932f2f09-4581-4c2c-861d-5145ad7ab97a) procedure to complete the refill request.  **Result:** This completes the transfer process and initiates the refill order. | |

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| Possible Errors and Actions |

Use the appropriate scenario:

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| Error | Action | | | |
| **Match Rx Number**  (Cannot locate Rx # on any commercial account) | Ensure you have the correct Rx number (possible transposing of numbers). | | | |
| **If…** | | **Then…** | |
| Yes | | Access previous account to verify the prescription number, if possible. | |
| No | | Research further into a possible new order. | |
| **If the…** | **Then…** |
| Prescription Number was entered incorrectly | Return to Step 4 and re-enter the correct prescription number. |
| Member verifies the number entered is correct | 1. Verify with the member that the prescription number provided is our Mail Order prescription. 2. Verify the member’s information on the Main Screen including the date of birth, gender and spelling of the name. |
| **Date of Birth does not match, Cannot Continue** | Verify the personal information.  **Example of Date of Birth error:** | | | |
| **If the personal information is…** | | **Then…** | |
| Correct | | Create a Manual Refill Task from the **NEW** account as follows:   * **Task Category:** Order Placement * **Task Type:** Refill Request – Manual * **Queue:** Order Placement – Participant Services   **Note:**   * Indicate in the “Notes” section “Unable to transfer refills due to non-matched date of birth. * Include previous ID number and Client Code from which the prescription will be transferred.   **Create RM Task from the new account as follows**:   * **Task Category:** Customer Care Internal Process * **Task Type:** Participant Callback Request * **Queue:**   **\*** CC Internal Research/Nashville  **\*** CC Internal Research/Richardson  **\*** CC Internal Research/MED D Spanish | |
| Incorrect | | Advise member to contact their Benefits Office for correction to the account. | |
| **Automated Transfer Refills button does not result in successful transfer** | There is a system error.  Submit a task to move all the applicable prescriptions over to the new account as follows:  **Note**: Before submitting the task for transfer, close the account and reopen. This will sometimes result in the prescriptions populating. | | | |
| **Step** | **Action** | | |
| **1** | Create an RM Task and include the following information:   * **Task Category:** Order Placement * **Task Type:** Refill Request – Manual * **Queue:** Order Placement – Participant Services   **Notes:**   * RM task **must** be submitted in new / current account. * RM task **must** be completed under correct member’s name. * Ensure Rx’s have valid refills available. If they do not, refer to [Obtaining a New Prescription (Rx) for the Member (058827)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a1443f4f-499e-442c-be11-fd2b207bf86c). * Turnaround Time: Up to 5 business days. | | |
| **2** | Include the following in the task notes:   * Member ID from account where Rx’s currently reside. * Rx numbers for prescriptions that need to be filled today. * Remaining Rx numbers for prescriptions only to be transferred and not filled today.   **Examples:**  Fill today: Rx xxxxxxxx; xxxxxxxxx  Transfer only: Rx xxxxxxxx; xxxxxxxx | | |
| **3** | Submit the task. | | |
| **4** | Document the call in PeopleSafe. | | |

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| Related Documents |

**Exceptions**: [Participant Hold (027254)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=76ff600a-8205-4ae2-82c0-cf3d007af90c) and [PBM Hold (027255)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b4a37eb-2741-4f6b-ba52-09fa2ec55ccc)

**Note:** The Account that prescriptions are being transferred to must have active eligibility.

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

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

**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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