# PeopleSafe - Fulfillment Requests

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**Description:** Direction that helps determine when a fulfillment request should be processed through Fulfillment automation in PeopleSafe or a manual Resolution Manager Task.

 Fulfillment requests can only be submitted for “Active” accounts.

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| Determining How to Handle Fulfillment Requests |

Perform the steps below:

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| **Step** | **Action** |
| **1** | 1. [Search Find and View a Member's Profile in PeopleSafe and RxClaim (027257)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=57660ff2-9cac-4009-8267-7231e754b512). 2. Review the Client Information Form (CIF) in theSource to determine who processes fulfillment orders prior to beginning a process. 3. Access the View Activity screen to determine if the Fulfillment item has already been requested. |
| **2** | Determine what type of fulfillment is needed then refer to the [Fulfillment Table](#_Fulfillment_Table_04/07/2020) below. |

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| Fulfillment Table |

**N****ote:** Letters of Eligibility and/or Termination need to be requested through the members’ benefits office or coverage provider.

Each of the following fulfillment items will be client specific (Review the CIF):

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| **Fulfillment Item** | **Refer to…** |
| Appeals Form | [Fulfillment Requests](#_Various_Work_Instructions_3) |
| Authorization Form: One-time or Extended (Ongoing) Authorization Release | Do not use Fulfillment Automation in PeopleSafe.  [Resolution Manager Task](#_Resolution_Manager_Task_2)  **Or**  The member can download on Caremark.com  **Note:** Review the CIF as some plans do not allow the member to access Caremark.com directly. |
| Benefit Information – Varies by Client. | Verify CIF for details concerning:   * Benefit information access * Who handles fulfillment (could include Caremark, Client, Other)   **Examples** of CIF instructions:   * Company/Plan specific website * Caremark.com access * Phone number listed * Third party Process * Specific RM Task     [Member ID Card/Benefit Info (Kit) & Replacement (008174)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f8164eb0-4f1b-404c-95c8-3d885186138e) or [Resolution Manager Task](#_Resolution_Manager_Task_2)    **Note:** Only use **RM Task** for (and specify in notes “why” the RM task is being used):   * Specific clients * Multiple cards, more than 5 forms requested * When automation does not work   **Example:** Use RM Task process if receive error: “Label not available for this client” displays upon clicking on Order Card, Kitbutton. |
| Cancel Fulfillment Order | Access the PeopleSafe Main Screen select **Order Fulfillment**. Under Fulfillment History select **Cancel Order.**  **Note:** Cancellation is only available for a short time after the fulfillment order has been created. |
| Caremark.com Brochure | [Fulfillment Automation](#_Various_Work_Instructions_3) |
| Claim Form | [Fulfillment Automation](#_Various_Work_Instructions_3) |
| Claim Form for Compound Prescription | [Resolution Manager Task](#_Resolution_Manager_Task_2)  Specify in the task notes that a compound prescription form is needed.  Refer [Paper Claim Multi-Ingredient Compound Prescription (042384)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=06a1b33b-4f4a-4603-a8ab-e0f1376bfdca). |
| Counseling Sheet | [Resolution Manager Task](#_Resolution_Manager_Task_2) |
| Drug List (Plan’s formulary drug list)  **Note:** Review the CIF for online access availability, Caremark.com access | [Fulfillment Automation](#_Various_Work_Instructions_3) |
| Extra Bottle | [Extra Bottle Requests (004624)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=11fcc2d4-1d39-4b76-a6ac-9701e58372dd) |
| Financial Statement of Cost (SOC) | [Financial Statement of Cost (SOC) Member, Spouse or Dependent (043264)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7049837e-d636-430e-b990-ae0706bd09e9) |
| Fulfillment – Alternate or Accessible Formats   * Large print * Braille * Data CD * Audio CD | Refer to [Special Dispensing Instructions ScripTalk, Braille, Large Font and Signature (008618)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=fe97f023-d5aa-4578-ad84-b0e4e7b58b92) or  [Language Assistance Verbal Written Translation and Hearing or Speech Impaired (036465)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=2b1b303b-6046-4a45-8392-da51589d10f5). |
| Fulfillment – Non-English Language | Icon - Important **Do not offer non-English languages unless requested by the member.**  Refer to [Language Assistance Verbal Written Translation and Hearing or Speech Impaired (036465)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=2b1b303b-6046-4a45-8392-da51589d10f5) |
| Inaccurate or conflicting member information | Refer to [Account Executive Consideration Task (AE Task) (027240)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=497dcdb2-2c97-4a3a-afe9-1fa95f6dd734) |
| Mail Service Order Form | Two options are available to obtain these forms:   * Members can download and print the paper order form from [Caremark.com](https://www.caremark.com/wps/portal) use a blank envelope to apply a postage stamp, then mail the order form to the mailing address pre-printed on the order form. * Order the forms and envelopes for the member using [Fulfillment Automation.](#_Various_Work_Instructions_3) |
| Member ID Card - Varies by Client | Validate in CIF to determine who handles ID Cards research any related details concerning ID Cards   * If **Caremark** is listed and Plan allows Caremark.com access: * Offer member option to print ID Card at Caremark.com account * Assist with account access as needed (password change, submit reactivation link) * If member still request an ID Card shipped to address & **Caremark** handles: * Verify the correct address * Continue automation **Order Card, Kit** button save order * Provide estimated TAT: Processed within three days then shipped next business day * Validate in CIF.   Refer to [Member ID Card/Benefit Info (Kit) & Replacement (008174)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f8164eb0-4f1b-404c-95c8-3d885186138e) or [Resolution Manager Task.](#_Resolution_Manager_Task_2)  **Note:** Only use RM Task for specific clients. Use if the error“**Label not available for this client**” displays upon clicking the “**Order Card, Kit**” button. The CIF states Caremark handles these requests.   * If the previous orders for ID Cards indicate that the request has failed more than once, submit an [Account Executive Consideration Task (AE Task) (027240)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=497dcdb2-2c97-4a3a-afe9-1fa95f6dd734) |
| Notice of Privacy Practices (NPP) | [Requests for Privacy Office/Officer (002186)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1b12e088-b8a4-4093-94b4-e8a3093d0398) |
| Package Inserts | [Resolution Manager Task](#_Resolution_Manager_Task_2) |
| Participant AOB (Assignment of Benefits) Form | [Fulfillment Automation](#_Various_Work_Instructions_3) |
| Pharmacy Listing | Members can find their in-network pharmacy list on Caremark.com  **Note:** Review the CIF, some plans do not allow the member to access Caremark.com directly.  High Importance Do **not** use the option in Fulfillment Automation, it may not be accurate. |
| Pre-paid Envelopes | Some clients have a custom process in which we can request postage paid envelopes be sent to members.  For instructions on how to submit these requests, refer to the CIF - Client Specific Process section. |
| Non-Childproof or Easy Open Caps | [Non-Child Proof or Easy Open Cap Requests (004625)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ff151ff4-cc1e-4b4c-90ad-0a579ed1cc90) |

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| Fulfillment – Alternate or Accessible Formats |

Icon - Important **Do not offer alternate or accessible formats unless requested by the member.**

Members may request any of the following fulfillment types in an alternate/accessible format listed.

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| **Fulfillment Type** | **Alternate Formats** |
| All Plan Materials | * Large print * Braille * Data CD * Audio CD   **Note:** The Counsel Sheet (Large Font) option in PeopleSafe will only fulfill the counseling sheet in large print. All other large print requests follow the process below. |

**Note:** Before attempting to resolve any fulfillment request, review the CIF to determine if CVS Caremark handles the fulfillment for the client.

Perform the following steps:

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| **Step** | **Action** | |
| **1** | In what format do you need this letter?  **CCR:** Members enrolled in these plans can request **any plan materials** in an alternate/accessible format. | |
| **If the member requests…** | **Then…** |
| * Large print * Braille * Data CD * Audio CD | I would be happy to submit your request.  Icon - Important Alternate/Accessible formats can be requested only **after a member has received the original letter**, which is used to generate the alternate/accessible format version of the letter.   * Do **not** send requests asking for future letters to be sent in alternate/accessible formats.   I apologize. Alternate/Accessible formats are only provided **after** you receive the letter in its original format. When you receive future mailings, please contact us again to request that document to be mailed in an alternate/accessible format and we will be happy to assist. Thank you.  Submit the following RM Task:   * **Task Category:** Customer Care Internal Process * **Task Type:** Account Executive Consideration * **Queue:** CC Internal Processes – Client Support * **Notes:**  Document the following: * Beneficiary’s Name * Beneficiary’s Mailing Address * Participant External ID (Member ID) * Letter type * Original Letter Date * Alternate/Accessible Format * Confirmed the beneficiary received the original letter   Proceed to Step 2. |
| Non-English Language | Refer to[Fulfillment – Non-English Language.](#FulfillmentNonEnglishLanguage) |
| **2** | Your request should be processed within 3 business days and sent by USPS mail service. | |

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| Fulfillment Automation |

Perform the following steps:

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| **Step** | **Action** | |
| **1** | Click on **Order Fulfillment** Button on the Main screen then review the Fulfillment History section to determine if the Fulfillment item has been requested. | |
| **2** | Verify the address. **Note:**  If member request item(s) to be shipped to location other than what is listed, select **Change Contact Info**. Refer to [Address, Email and Phone Number Changes (004566)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a09925d4-9dbb-407b-b579-c17eec6e62ee).. | |
| **If speaking with…** | **Then...** |
| Member | Verify address for the request and select the radio button for the applicable Ship to Address. |
| Anyone else | Ask the caller to provide the address. |
| **3** | Select the appropriate fulfillment items from the Fulfillment/Print Set drop-down menu. | |
| **4** | Select **Quantity (Qty) of selected item** from drop down menu.  **Note:** The maximum quantity that can be ordered at one time is five. If more than five (5) are needed, create a RM Task (Bulk Literature Request). Educate member that they will receive new pre-populated order forms with every order and many forms are available on Caremark.com per the CIF for printing by the member  **RM Task (Bulk Literature Request)**   * **Task Category:** Fulfillment * **Task Type:** Bulk Literature * **Queue:** Fulfillment – Richardson * Select appropriate Order Item * Obtain Mailing Address (Must be a physical address, orders are sent via UPS) | |
| **5** | Select **Add.**  **Result:** Items display in the “Items Selected” field.  **CCR:** Remove an item by selecting the **Remove item** hyperlink. | |
| **6** | Select **Save Order** to send fulfillment request.  **Result:** Items display in the Fulfillment History section of the window.   * Pre-paid envelopes are not included with any items sent through automation.   **Result:** The **Fulfillment History** screen displays:   * Action: Click **Cancel Order** hyperlink, if available. * Items: Fulfillment items have been added to order(s) * Quantity: Quantity of that fulfillment item (up to 5) * Date Ordered: Date the order was created * Status Date: Date of the item’s last status change (**Examples:** Pending cancelled) * Status: Status of request (**Examples:** Shipped or cancelled) * Source: Source that is fulfilling the request (PeopleSafe or IVR) * Order Details: Other ancillary information regarding the request   **Cancel Order:**   * To cancel the request, click on the **Cancel Order** hyperlink. The Order Details link provides the specifics of the fulfillment order.   + If **no** fulfillment items are set up for the client, the following error pop-up displays:      * + If you receive the pop-up message listed above, review the CIF to determine if we handle the fulfillment item (**Example:** ID cards)     - If yes, send a **Client Issue Form** as indicated below: | |

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| Resolution Manager Task |

Perform the following steps:

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| **Step** | **Action** | |
| **1** | Access the **View Activity** screen to determine if the Fulfillment item has been requested. | |
| **2** | From the PeopleSafe Main Screen click the **Resolution Manager New** tab. The member details should transfer. | |
| **3** | Select the **Fulfillment Task Category and the Fulfillment Type** from drop down menus. | |
| **4** | Populate the required fields (\*). | |
| **5** | Verify shipping address with caller. | |
| **If you are speaking with…** | **Then...** |
| Member | Proactively verify shipping address for the request.  High Importance If member request for item(s) be shipped to a location other than what is listed, input the member’s delivery address they wish to have the item(s) shipped to. |
| Anyone else | Ask the caller to provide the shipping address. |
| **6** | Provide detailed information in the **Notes** field then select **Save and Close**. | |

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| Turn Around Time |

Up to three business days (This timing is only internal processing time and does not include mailing time).

**Exceptions:** [Resolution Manager RM Task Types Process (029980)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3438a8ea-9ad1-4c4b-b710-57dab144493c)

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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)

[General Resolution Times/Turn Around Times (TAT) and Related Documents (028775)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=863acba1-4370-4da9-9f6b-4cadf8633fbf)

**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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