**PeopleSafe - Participant Hold**

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**Description:** Procedures to place a participant/member hold on a prescription request until such time that it is needed. Holds are available for new prescriptions and will be visible to all PeopleSafe users.

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| **Reminders** |

The member has 2 hold options:

* Hold Indefinitely
* Hold Until

 Prior to placing a duplicate prescription on hold, verify the drug name, strength, quantity, same date written, and day supply.

 Educate the member that they will receive a letter advising a prescription was placed on hold upon their request.

**** Some orders cannot be placed on hold because they have not yet started processing or were previously voided.

In addition, designated Caremark Pharmacy Operations personnel may also initiate a [PBM Hold (027255)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b4a37eb-2741-4f6b-ba52-09fa2ec55ccc) or a [Delayed Prescriber Response/Prescriber Requests Hold (023699)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0df7701a-8e8e-402b-8041-d21ce4828e44) for a prescription. Customer Care Representatives can request for the release of the Rx hold if everything has been taken care of by [Expediting Mail Order Processing Time and/or Upgrading Order Shipping (118121)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=97e4d878-f5fe-4901-8e76-4439f248ed76).

**Notes:**

* When placing a prescription on hold, add an Order Level Comment of who is requesting the hold. **Examples:** Member’s name or Authorized Party POA.
* Refer to the [HIPAA Grid (028920)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce) to determine who can verify the order number, Rx number, Rx name, and who can place an order on hold.
* Prescriptions enrolled in the Auto Refill Program cannot be placed in a Participant Hold Status. The order must be cancelled. Refer to [Auto Refill Program (ARP) (022387).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=89a5f1e4-2fea-404a-a5f8-6e50549eb3de)

 If the participant hold button is grayed out (unavailable) it may be too far along in processing. Refer to [How to send a Pharmacy Stop Tote Request (017745).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1232023a-60c7-4441-9013-17ecbd554451)

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| **Placing a Prescription on Participant Hold Indefinite** |

Do not place C2 prescriptions on Hold. We can fill C2 prescriptions in which the prescriber has written “do not fill until.” In this case, the member can send the three consecutive 30-day prescriptions in at one time, and we will place them on hold until they are ready to be filled. The member cannot place holds on C2 prescriptions.



Perform the steps below:

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| **Step** | **Action** |
| **1** | Access PeopleSafe **Main** screen and identify the applicable prescription and order to be placed on hold. |
| **2** | Select the applicable Order number.  **Result:** The Order Statusscreen displays.  **Notes:**   * Prior to placing any/all prescriptions on hold, verify the drug name, strength, quantity, same date written, and day supply. * If the prescription is expired, advise the member and follow current processes for handling expired prescriptions. * A prescription cannot be held past the expiration date. C2 medications cannot be placed on hold by the member. |
| **3** | Select the prescription to be placed on hold from the **Order Line Items** box by checking the corresponding check box.  **Result:** Highlights the prescription to be placed on hold. |
| **4** | Click the **Participant Hold** button.  **Result:** Participant Hold pop up box displays  **Notes:**   * When placing an Rx on indefinite hold ask the probing question:  Would you prefer this prescription to be discontinued or just placed on hold indefinitely? Refer to [Discontinued Prescription (008895)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6a069336-d84a-435d-97be-49eaccd5ab77). * Make sure the member understands the difference and may want to simply discontinue the Rx instead. * Placing a prescription on indefinite hold means the prescription will be held until the member or Authorized Party calls back to have the prescription released/filled or until it expires. |
| **5** | Select **Indefinite Hold** from dropdown menu in the pop-up box.  A screenshot of a computer  AI-generated content may be incorrect. |
| **6** | Click the **Save and Close** button. |
| **7** | Add an Order Level comment under the order in question stating why the order was on hold and who requested the hold.  **Note:** This Comment is not auto documented and must be added to the Order Level screen.  **Example:** Member <member’s first and last name> is no longer taking this medication.  Refer to [Viewing and Creating Comments in PeopleSafe (086165)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=dfe59c11-8a1a-4c1e-b939-2825186a20ce) to create an order level comment of who requested the prescription to be placed on hold. |

**Notes:**

* Hold Indefinite (Member or CVS Caremark request) prescriptions will not transfer to new vendors (PBMs) upon client/plan termination.
* This includes Caremark to Caremark plans and client changes, view [Transfer Existing Rx to New Account (Carrier-to-Carrier Rx Transfer/Open Rx Transfer) (004727)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3a6af7a1-b552-4822-b26e-a01fcdafb2a7).
* In escalated situations, contact Clinical Care for possible pharmacist to pharmacist transfer.
* If the member requests the prescription be **returned** (**not** filled), refer to [Exceptions](#_Resolution_Time:)*.*

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| **Releasing a Prescription from Participant Hold Indefinite** |

Perform the steps below:

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| **Step** | **Action** |
| **1** | Check status of Rx on main screen, then Click the **Order Placement** tab.  **Note:** Prescriptions on Indefinite Hold will appear on the main screen as **Reject Hold**.  A screenshot of a medical form  AI-generated content may be incorrect. |
| **2** | Locate the appropriate prescription on the **Refill Request** screen.  **Note:** Prescriptions with **Indefinite hold** are identified on the **Refill Request** screen.  A screenshot of a computer  AI-generated content may be incorrect. |
| **3** | Place the Refill. Refer to [Prescription (Rx) Refill Order (004628)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=932f2f09-4581-4c2c-861d-5145ad7ab97a).  **Reminder:** Ensure ALL steps are completed for placing a refill as we must review and confirm the order information, verify member’s information, provide cost with disclaimer, and verify payment method to be used for the order.  **Note:** If the prescriptions do not show on the Refill Request screen, refer to [Manual Refill (027179)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=eea92f37-f941-4237-9b9e-af999ad68e8f). |

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| **Placing a Prescription on Participant Hold Until** |

**DO NOT** place C2 prescriptions on hold. State Laws restrict C2 prescriptions from being placed on hold.



Perform the steps below:

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| **Step** | **Action** |
| **1** | On the **Main** screen identify the applicable prescription and order to place on hold. |
| **2** | Click on the applicable order number.  **Result:** The **Order** **Status** screen displays.   * + If the prescription is expired, advise the member and follow current processes for handling an expired prescription.   **Note:** A prescription cannot be held past its expiration date. CII medications **cannot** be placed on **Hold Until**. |
| **3** | Select the prescription to be placed on hold from the **Order Line Items** box by checking the corresponding check box.  **Result:** Highlights the prescription to be placed on hold. |
| **4** | Click the **Participant Hold** button.  **Result:** Participant Hold pop up box displays. |
| **5** | Select **Hold Until** from dropdown menu in the pop-up box.  A screenshot of a computer  AI-generated content may be incorrect. |
| **6** | Ask the member what date they would like the prescription filled. |
| **7** | Type the requested date in the **Hold Until** field.  A screenshot of a computer  AI-generated content may be incorrect. |
| **8** | Click the **Save and Close** button.  **Note:** The prescription displays a Future Fill date on the Main screen. The Status field displays TRANS–DIV.  A screenshot of a computer  AI-generated content may be incorrect. |
| **9** | Refer to [Viewing and Creating Comments in PeopleSafe (086165)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=dfe59c11-8a1a-4c1e-b939-2825186a20ce) to create an order level comment of who requested the prescription to be placed on hold. |

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| **Releasing a Prescription from Participant Hold Until** |

Perform the steps below:

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| **Step** | **Action** | |
| **1** | On the PeopleSafe **Main** screen identify the applicable prescription and confirm the **Future Fill** date. | |
| **2** | Click on the applicable order number.  **Result:** The **Order** **Status** screen displays. | |
| **3** | Locate the applicable prescription under the Order Items section. | |
| **4** | Click on the **(+)** button to expand or view the Prescription Details. | |
| **5** | Determine the type of hold for the applicable prescription. | |
| **If the prescription is on…** | **Then...** |
| Participant Hold (FFL - PPT Hold) | Proceed to [Step 7](#Step7). |
| Caremark Hold | Refer to [PBM Hold (027255)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b4a37eb-2741-4f6b-ba52-09fa2ec55ccc). |
| Delayed Prescriber Response Hold (FFL DPR Hold) | CCR cannot release these holds. Refer to [Delayed Prescriber Response/Prescriber Requests Hold (023699)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0df7701a-8e8e-402b-8041-d21ce4828e44).  **Med D process:** [MED D - Delayed Prescriber Response/Prescriber Hold Process (107511)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ecdd6f9e-cbde-4226-a5df-50db47f4215b). |
| Hold due to Stop See Comment by member requesting to hold prescriptions until Member approves shipment | Add Order Level comment stating who gave consent. Click Expedited shipping button.  If order is not in process, place the order via Order placement screen and document who gave consent in notes. |
| **6** | Select the prescription from the **Order Line Items** box by checking the corresponding check box.  **Result:** Highlights the prescription to be released from hold. | |
| **7** | Click the **Participant Hold** button.  **Result:** Participant Hold pop up box displays. | |
| **8** | Select **Ship Now** from dropdown menu in the pop-up box.  A screenshot of a computer  AI-generated content may be incorrect. | |
| **9** | Click the **Save and Close** button.  **Result:** The order is released from hold and resumes processing.  If unable to release order using steps 7-Clicking Save and Close, create the following task:   * **Ask Category:** Order Status * **Task Type:** Expedite Order In Process * **Queue:** Order Status – Participant Services   **Notes:**   * Include the following: “Could not release via automation, sending task per work instruction.” * Include detailed notes about the situation and include the number of days’ supply the member has on hand.   Do not use the Save and Create Callback button unless the member asks for a callback.  For all Expedite order In Process tasks, method of payment must be included in task if client is not Fill and Bill. | |
| **10** | Add Order Level Comments. Refer to [Viewing and Adding Comments in PeopleSafe (086165).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=dfe59c11-8a1a-4c1e-b939-2825186a20ce) | |

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| **Hold of Prescriptions NOT in Process** |

When a member requests to hold a prescription that is **NOT** currently in process:

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| **Step** | **Action** |
| **1** | Create a Stop See conflict at the member level. Refer to [Stop See Comments (007009).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6a481d2d-cc6d-40f0-af30-1858db02b7a4) |

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| **Hold of AutoFill Order** |

When a member requests to hold a prescription that ison the [Auto Refill Program (ARP) (022387)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=89a5f1e4-2fea-404a-a5f8-6e50549eb3de):

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| **Step** | **Action** |
| **1** | Prescriptions enrolled in the Auto Refill Program cannot be placed in a Participant Hold Status. The order must be cancelled. Refer to **Canceling an AutoFill Order** in [Auto Refill Program (ARP) (022387).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=89a5f1e4-2fea-404a-a5f8-6e50549eb3de) |

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| **Exceptions** |

Member requests prescription returned (**Never** filled and not metered).

**Participant Hold Indefinite and Participant Hold Until:**

* **Task Category:** Order Status
* **Task Type:** Cancel Prescription
* **Queue:** Order Status – Participant Services
* **Notes:** Indicate “Please RTP – member requested prescription returned NEVER filled.”

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| **Related Documents** |

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

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

**Parent Documents:** [CALL 0049 Customer Care Internal and External Call Handling](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0049), [CALL 0011 Authenticating Callers](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0011)

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