# PeopleSafe - Address, Email and Phone Number Changes

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**Description:** Covers the processes and Talk Tracks when a member requests an address change or removal.

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| MED D Quick Reference |

When the caller is a **MED D Beneficiary:**

|  |  |
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| **If…** | **Then…** |
| SSI/NEJE CCR with permanent address change | Refer to [MED D - Address Changes and Out of Area (OOA) (030149)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0ba6dea9-4b34-4351-b06a-ec81046f6c0f). |
| SSI/NEJE CCR with phone change | Refer to [MED D Email and Phone Number Changes (112972)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e0799360-70cd-4d44-a8b0-3112e61449f3). |
| SSI/NEJE CCR with email change | Refer to [MED D Email and Phone Number Changes (112972)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e0799360-70cd-4d44-a8b0-3112e61449f3). |
| All other CCRs with any changes | Proceed to the next section. |

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| Reminders |

Only members (and designated individuals such as POAs) can make account updates as permanent or default changes.



 **Non-Member/Third Party Callers:**

* Are not authorized to make account changes.
* **Legal Guardians:** Caller must have legal documentation on file to make changes.

Refer to [HIPAA (Health Insurance Portability and Accountability Act) Grid - CVS (028920)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce) under Authorized Parties (Non-Member/Third Party) section.

**Reminders:**

* Changes are made to the profile at the member level. This procedure defines address changes that can sometimes be made at an order level.
* Address changes affect other communications sent to the member.

**Example:** Forms, cards, etcetera.

* Military addresses can be added to the account.

**Notes:**

* + - The PBM ships prescriptions to APO, FPO, and DPO Boxes apart from Germany.
    - Controlled substances are shipped.
    - Cold packs cannot be shipped.
  + Input the address like a normal address, however, with the city and states using the information below.

**Example:** SSGT <First Name> <Last Name> <Unit Number> <Box Number> <Military City> <Military State> <zip code>

* + - **Military states:**
      * AE - Armed Forces Europe, Middle East, Africa, and Canada
      * AA - Armed Forces Americas
      * AP - Armed Forces Pacific
    - **Military cities:**
      * **APO** – Army Post Office is used in conjunction with Army or Air Force installations.
      * **FPO** – Fleet Post Office is used in conjunction with Navy installations.
      * **DPO** – Diplomatic Post Office is used for the U.S. Diplomatic locations.

**Notes:**

* Orders not received and not displaying on Main Screen, refer to [Stop See Comments (007009)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6a481d2d-cc6d-40f0-af30-1858db02b7a4).
* For a list of  U.S. Territories and Canadian provinces that mail order ships to refer to [PeopleSafe - Address Abbreviations for U.S. Territories and Canada (026065).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5c30352b-8c77-4229-9f2f-18599b967424)
* Review shipping restrictions before entering address outside of United States, refer to [PeopleSafe - Shipping Guidelines, Fees and Order Tracking (004611)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=49a324cd-73b1-4e49-bdae-9ac58e18d184).

**** If the caller is a **MED D Beneficiary**, follow the steps found under [MED D - Address Changes and Out of Area (OOA) (030149)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0ba6dea9-4b34-4351-b06a-ec81046f6c0f) and [MED D - Email and Phone Number Changes (112972)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e0799360-70cd-4d44-a8b0-3112e61449f3).

Enhancements have been made to increase the efficiency and ease-of-use to include:

* **Streamlined Address View:** One Primary and/or One Alternate address displayed.
* **Selectable Address Change Reasons:** A drop-down list of valid change reasons (LINKS & Verify Order).
* **Audit Trail:** The ability to view who made changes to the address on-file.
* **Notes:** Member addresses and phone numbers in PeopleSafe may be impacted by plan sponsor records.
* If the member does not update their address and phone number with their Plan Sponsor, then the address change may not be permanent. Advise the member to contact their plan to ensure their contact information has been updated.
* If a member wants to place a refill, and change their address, refer to [PeopleSafe - Prescription (Rx) Refill/ Renewal (Order Placement) (004628)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=932f2f09-4581-4c2c-861d-5145ad7ab97a).
* Any address that has even been attached to an order cannot be deleted from the system.

A screenshot of a computer

AI-generated content may be incorrect.

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| Primary Address Talk Track |

Use the following table to determine what action to take if one of the following scenarios is applicable:

|  |  |  |
| --- | --- | --- |
| **If member calls in and advises they have…** | **Then…** | |
| Sent in a Home Delivery/Mail Order form and questioning the location of their order | Perform the steps below:  If the caller is a MED D Beneficiary, follow the steps found under [MED D - Address Changes and Out of Area (OOA) (030149)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0ba6dea9-4b34-4351-b06a-ec81046f6c0f) and [MED D - Email and Phone Number Changes (112972)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e0799360-70cd-4d44-a8b0-3112e61449f3). | |
| **Step** | **Action** |
| **1** | Verify Order in PeopleSafe.   * If the **Ship To** address is different from what the member states, advise member.   Any address provided on the Mail Service Order form will be considered the **Primary Address** type. |
| **2** | Proceed to [Order Reships (038651)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1d44c6bc-e5ba-4f93-b5ab-0b733ad871d6), section Order Lost in Transit.  **Note:** When there are conflicting addresses on the form (**Example:** Pre-printed address and a different address in the Shipping Section), the system recognizes the address written by the member in the Shipping section as the Primary Address. |
| Attached a note to the Home Delivery/Mail Order form indicating where they wanted the order delivered | Perform the steps below: | |
| **Step** | **Action** |
| **1** | Verify Order in PeopleSafe.   * If the **Ship To** address is different from what the member states, advise member.   The primary address will only be updated if the correspondence clearly states that you have moved. If the PBM cannot determine that the request was for a primary address, the request will be entered as a single use address type. |
| **2** | Proceed to the [Add or Change Address](#_Available_Task_Types) section of this document and update the address to reflect member's request. |

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| Alternate Address Talk Track |

Use the following table to determine what action to take if one of the following scenarios is applicable:

|  |  |  |
| --- | --- | --- |
| **If member calls in and advises they have…** | **Then…** | |
| Sent in correspondence indicating that they would be at another location for an extended period of time | Perform the following steps:  If the caller is a **MED D Beneficiary**, follow the steps found under [MED D - Address Changes and Out of Area (OOA) (030149)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0ba6dea9-4b34-4351-b06a-ec81046f6c0f) and [MED D - Email and Phone Number Changes (112972)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e0799360-70cd-4d44-a8b0-3112e61449f3). | |
| **Step** | **Action** |
| **1** | Verify the Order in PeopleSafe.   * If the **Ship To** address is different from what the member states, advise member.   The address you sent us will be entered for a temporary 30-day range and our mail pharmacy will contact you for clarification. This will allow the current order to continue processing without any delays. |
| **2** | Proceed to the [Add or Change Address](#_Available_Task_Types) section of this document and update Alternate address to reflect the member's request. |

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| Single Use Address Talk Track |

 If **Alternate** is selected, the Effective/Expiration date must be entered in PeopleSafe. Enter dates that the requestor selects.

* When an order is started using a “one-time” address and it diverts to future fill. It releases and selects the member’s default address on file.
* Entering a date range ensures the prescription will ship to the correct address if it is added to Future Fill.

Use the following table to determine what actions are taken if the following is applicable:

|  |  |
| --- | --- |
| **If member calls to…** | **Then…** |
| Verify address on order is correct for single use delivery | If the caller is a **MED D Beneficiary**, follow the steps found under [MED D - Address Changes and Out of Area (OOA) (030149)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0ba6dea9-4b34-4351-b06a-ec81046f6c0f) and [MED D - Email and Phone Number Changes (112972)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e0799360-70cd-4d44-a8b0-3112e61449f3).   * Verify Order in PeopleSafe.   + If the **Ship To** address is different from what the member states, advise member.   The address you sent us will be entered as a single use address type unless the correspondence clearly states that you have moved.   * Proceed to the [Add or Change Address](#_Available_Task_Types) section of this document and update address to reflect member's request.     **Note:** The Mail Order system recognizes a single use address when the appropriate box is selected on the Mail Service Order Form. |

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| Add or Change Address |

 Mail Order prescriptions (including controlled substances) should **never** be sent to a retail pharmacy for pick up. Any member requesting to have a prescription mailed to their local pharmacy or set as an alternate address is not permitted.

**Notes:**

* If the caller is referring to an address change of an open order, refer to the [Open Order Address Changes](#_Open_Order_Address) section of this work instruction.
* If **order is locked** or if a pop up box stating order locked by “qcpxxx” displays, call the Senior Team or email the filing pharmacy to release the order.
* When the order placed by the member (or faxed or eScribed by the MDO-Medical Doctors Office) is not displaying, refer to [Stop See Comments (007009)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6a481d2d-cc6d-40f0-af30-1858db02b7a4).

Perform the steps below to add or change an address:

|  |  |  |
| --- | --- | --- |
| **Step** | **Action** | |
| **1** | Review High Priority Comments and Stop See Comments to determine if there are address related restrictions on the account.   * If restrictions exist, note the members that are affected and adhere to the restrictions. | |
| **2** | Determine if the address change applies to only the member or the member and minor children.  Advise the member you can **only** update their individual address and those for any minor children.  Only members (and designated individuals such as POAs) can make these requests as permanent or default changes.  **Non-Member/Third Party Callers:**   * Are not authorized to make address changes. * **Legal Guardians:** Caller must have legal documentation on file to make changes. Refer to [HIPAA (Health Insurance Portability and Accountability Act) Grid - CVS (028920)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce) under Authorized Parties (Non-Member/Third Party) section. * Confirmation is required from the other adult members on the account before their individual addresses can be made permanent or default. * Ask if the other adult members are available so that the changes can be made **during the call.** * If the member comes on the line to approve for the caller to update contact information, re-authenticate the member before making any changes. * If a member is unavailable, the other members can call back or update their addresses individually using the Web Portal. | |
| **3** | Access the **Main Screen** and click the **Change Contact Info** button.  **Result:** Contact Info screen is displayed. | |
| **4** | Review the address the member is requesting to determine if located in the list of addresses on the account.   * If yes, select the address to update on the account. Click on **edit**, then select the options to update PCL default, MOR default or Alternate. After selecting the reason for change click **Save**.   **Note:** If choosing an alternate then the effective and expiration dates must be entered.   * If no, proceed to Step 6. | |
| **5** | Click on the **Add** button on the left (middle of screen).  **Note:** If there are too many addresses on file and another address cannot be added, look for duplicate address lines that can be removed. Refer to [Removing a Member’s Address.](#_Removing_a_Member’s) | |
| **6** | Select appropriate Address Typeand input the correct address (Max limit of 30 characters).  Do not abbreviate the address. | |
| **7** | Set correct default indicator(s):   * MOR Primary * MOR Alternate * PCL Default Primary   If PCL Default Primary is selected, this is strictly a paper claim address.  **Example:** Mail Orders are shipped to their vacation address, but they file a paper claim and want their EOBs and Paper Claim reimbursement checks to go to a different address.  If **Alternate** is selected, the Effective/Expiration dates must be entered.  **Note:** When an order is started using a “one-time” address and diverts to future fill it will release and select the member’s default address on file. Entering a date range ensures the prescription ships to the correct address if it is added to Future Fill. | |
| **8** | Select the appropriate settings, as verified above in Steps 2 & 3:  **Only** update the member’s individual address and those for any minor children. | |
| **If the Address Change Applies to…** | **Then…** |
| Cardholder and minor children | * Select the **Apply Changes to Family** checkbox.   **Result:** Screen refreshes and the other family members’ displays with a check mark next to their names.   * De-select the **ALL-FAMILY MEMBERS** option and remove the checkmarks for those members not affected by the change. |
| Member only | Ensure that the **Apply Changes to Family** box is **NOT** checked. |
| **9** | Select the appropriate **Change Reason** via the drop-down menu. Refer to the table below for definition of choices: | |
| **Short Version** | **Long Version** |
| CDH Request | Cardholder Request  Primary cardholder whose name appears on the CVS Caremark card |
| Correspondence | Notification by correspondence |
| Elg as Primary | Selected eligibility as primary |
| Email Received | Email received |
| Family Addr Req | Address applied to family |
| Fax Received | Received fax document |
| Legal Rep Req | Legal Representative Request  Documentation must be on file that is valid under state law to support their legal authority to act on behalf of the patient.This may be a durable POA (Power of Attorney) that was signed while the patient was still competent, or a court appointment of a guardian/custodian or some sort of legal documentation. |
| Member Request | Refers to the Plan Participant over the age of 18 who is covered on the plan (other than the cardholder) |
| Pharmacy Call | Pharmacy Initiated Call |
| Scan Data Updt | Scan Data Update |
| Select Fmly Req | Address Applied selected family |
| Updt Eff / Exp | Effective/Expiration Updated |
| **10** | Click the **Save** button (located at the bottom left corner of screen).  **Note:** On theChange Info screen, the Address field updates with the new address. Updated information is displayed on the Main Screen in the Participant Detail Address field.  Verify and update any “In Process open orders” to reflect the correct address as requested by the member. Refer to [Open Order Address Changes](#_Open_Order_Address). | |
| **11** | Advise the member that the address change has been completed.  **Reminder:** To ensure a permanent address change, the member should update their address with their Plan Sponsor. Member addresses in PeopleSafe may be impacted by plan sponsor records. If the member does not update their address with their Plan Sponsor, then the address change may not be permanent.  **Example:** Primary Cardholder’s Employer, HR office, etcetera. | |

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| Removing a Member’s Address |

If the member has requested to remove an address from their account or if it becomes necessary to remove duplicate lines of address so that another address can be added to the account, perform the steps below:

|  |  |
| --- | --- |
| **Step** | **Action** |
| **1** | **Icon - Important Information** An address may be removed from a member's file entirely **only** if that specific address line has never been used to ship an order in the past.  Ask the member if we have shipped to the addresses on file **before** selecting to remove an address on file entirely. |
| **2** | Access the **Main** Screen click the **Change Contact Info** button.  **Result:** Contact Info screen is displayed. |
| **3** | Select the radio button next to the address line to be removed and click **Remove**, then click **Continue** to remove selected address.    **Note:** If the Remove button is grayed out, Member can add new or update address at Caremark.com. |
| **4** | Return to step 3 of [Add or Change Address](#_Available_Task_Types) to add a new address.  **Note:** If receive the pop-up message below when attempting to add the new address, then any new addresses need to be added manually via Caremark.com. Refer to [Adding Additional Addresses on Caremark.com](#_Adding_Additional_Addresses). |

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| Adding Additional Addresses on Caremark.com |

Perform the following steps:

|  |  |
| --- | --- |
| **Step** | **Action** |
| **1** | Click the **Caremark.com** tab to navigate to member’s Caremark.com account. |
| **2** | Click **Profile**. |
| **3** | Click **My Shipping Information**. |
| **4** | Locate the Primary Address and click **Edit**. |
| **5** | Input the new address and click **Save Changes**. |
| **6** | Click **Logout**.  **Result:** The PeopleSafe main screen displays to confirm that the new primary address has been added.  **Note:** If this is a **Single Use/one-time address**, access **Change Contact Info** and update the alternate address. |

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| Troubleshooting – System Issues |

If you receive a system error while attempting to add an address, follow the steps below according to the error you receive.

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| --- | --- |
| **If error is…** | **Then…** |
| Cannot add an address  **Example:** | When Adding Additional Addresses on Caremark.com does not work, follow steps below:   * + Submit Manual Refill Task:   Only use this when needing to place an order through Task. Add new address in task & notate address could not be added due to max limit reached.   * + Be sure to indicate if the address needs to be set as **Default,** **Single Use/one-time**, or as **Alternative**.   **Notes:**   * If Alternate is selected Effective/Expiration date must be notated in the task as well. * If requesting the removal of the same address entered multiple times, indicate that in the Task, plus that the address needs to remain on the account. |
| Any other type of errors not listed above  **Example:** | Contact the Senior Team to create a Help Desk/IT Ticket from the IT Service Center & select the template:  **PeopleSafe – General Issues**  Refer to [Senior Team - When to Call IT or Create a Ticket (02554)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bcc042fc-c825-4788-8e91-2238a6cb806c) for submission process. |

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| Email Changes |

**** If the caller is a **MED D Beneficiary**, follow the steps found under [MED D - Address Changes and Out of Area (OOA) (030149)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0ba6dea9-4b34-4351-b06a-ec81046f6c0f) and [MED D - Email and Phone Number Changes (112972)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e0799360-70cd-4d44-a8b0-3112e61449f3).

Authorized party callers (benefits offices, prescribers, individuals calling on behalf of the member, etcetera.) are not authorized to make email address changes. Only members (and designated individuals such as POAs) can make these requests.

Confirmation is required from the other adult members on the account before their email address can be added or changed.



**Note:** Anyone who is fully authenticated and is authorized to order a refill for a member can set up Messaging Platform Alert messages. To protect patient privacy, the caller must positively identify the email address listed in PeopleSafe.

Ask if the member is available to make changes during the call. If the member comes on the line to approve the caller to update contact information, you must have the member re-authenticate before making any changes.

Perform the following steps if a member requests that an email address change/update be made to their profile:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Step** | **Action** | | | | |
| **1** | Review High Priority Comments first to determine if there are email addresses related restrictions on the account.   * If restrictions exist, take note of which members are affected and adhere to the restrictions. | | | | |
| **2** | Obtain member’s email address and enter on the **Contact Info** screen.   * Refer to the scenarios below for changing, editing, and/or removing email addresses: | | | | |
| **If…** | **Then…** | | | |
| Member wants to add a new email address | Perform the steps below to add a new email address: | | | |
| **Step** | **Action** | | |
| **1** | On the Main screen, click on the **Change Contact Info** button. | | |
| **2** | On the Contact Info screen, type in the Email address then click the **Update** button. | | |
| System indicates the email address is invalid | Email addresses are flagged as invalid if recent email messages are caught in spam filters or the message “bounces.”  **Example:** Message is rejected by the provider as undeliverable (refer to [PeopleSafe - Obtaining an Email Address and Managing Messaging Platform Alerts (027674)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=918203d3-2d76-4044-b2d9-0ced0504d471).    Determine if the Email address in the system is correct: | | | |
| **If the Email address is…** | | **Then…** | |
| Correct | | Perform the steps below to reset the Invalid Email Indicator: | |
| **Step** | **Action** |
| **1** | On the Main screen, click on the **Change Contact Info** button. |
| **2** | On the Contact Info screen, click on the **Reset** button in the Email Address section. |
| Incorrect | | Perform the steps below to update the Email Address: | |
| **Step** | **Action** |
| **1** | On the Main screen, click on the **Change Contact Info** button. |
| **2** | On the Contact Info screen, type in the Email address then click the **Update** button. |
| Does not want to provide us with an Email address or wants it removed | Click to place a checkmark in the box in front of **Don’t Ask for Email Address** button. | | | |
| **3** | Ask the member if they would like us to notate their account to send them specific prescription information from the PBM. | | | | |
| **If member wants…** | | | **Then…** | |
| To be notified of their specific prescription information, such as when refills are available, when their order has shipped, etcetera.  For clients that use or have not previously registered on Caremark.com  I am going to send you an email with a personalized registration page on Caremark.com. You will be able to check the order status, order refills, and check drug costs and coverage.    If the member declines…  OK, if you change your mind, you can go to Caremark.com to register any time. | | | Assist the member in signing up for the PBM Message Platform. Refer to [PeopleSafe - Obtaining an Email Address and Managing Messaging Platform Alerts (027674)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=918203d3-2d76-4044-b2d9-0ced0504d471). | |

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| Phone Number Changes |

**** Once a phone number is added and saved to a member’s profile, it cannot be edited. The option exists to add another phone number. [Senior Team (016311)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9eef064d-c7d7-42f7-9026-1497496b4d51) does not have access to have the phone number removed.

** Note:** International phone numbers are not permitted.

Perform the following steps if a member requests that a phone number be changed on their profile.

**** If the caller is a **MED D Beneficiary**, follow the steps found under [MED D - Address Changes and Out of Area (OOA) (030149)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0ba6dea9-4b34-4351-b06a-ec81046f6c0f) and [MED D - Email and Phone Number Changes (112972)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e0799360-70cd-4d44-a8b0-3112e61449f3).

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Step** | **Action** | | | | | |
| **1** | Review High Priority Comments first to determine if there are phone number related restrictions on the account.   * + If restrictions exist, take note of which members are affected and adhere to the restrictions. | | | | | |
| **2** | Determine if the phone number change applies only to the member or the member and minor children.  Advise the caller you can **only** update their individual phone number and those for any minor children.  **Note:** Unauthorized party callers (benefits offices, prescribers, individuals calling on behalf of the member, etcetera.) are not authorized to make phone number changes without placing an order. Only members (and designated individuals such as POAs- Power of Attorneys) can make these requests.  Confirmation is required from the other adult members on the account before their individual phone number can be made permanent or default. A Default am and pm number must be selected, or the system will not allow Messaging Preferences to be set up via automated call.   * Ask if the other adult members are available so that the changes can be made during the call.   + If the member comes on the line to approve the caller to update their contact information, re-authenticate the member before making any changes.   + If the other adult members are unavailable, they can call back or update their phone number individually at the Member Web Portal. | | | | | |
| **3** | Refer to the scenarios below for changing, editing, and/or removing a phone number: | | | | | |
| **If…** | **Then…** | | | | |
| Member’s phone number needs to be added or updated | Perform the steps below: | | | | |
| **If Member’s phone number…** | | **Then…** | | |
| Is New | | Perform the steps below to add a new phone number: | | |
| **Step** | | **Action** |
| **1** | | Access the Main screen, click on the **Change Contact Info** button. |
| **2** | | On the Contact Info screen, click on the **Add** button in the Phone section. |
| **3** | | Select the appropriate **Phone Type:** Home, Cellular, Office, etcetera. |
| **4** | | Type in the plan member’s phone number and click the **Save** button |
| Needs to be updated | | Refer to New Process above. | | |
| Needs to be removed | | Currently, we do not have access to remove a number. Refer member to Caremark.com. | | |
| System indicates the phone number is invalid | Telephone numbers will be flagged as invalid if the phone is disconnected, busy, or does not have voice mail.  Messaging Platform attempts to contact plan members two times via phone before flagging a telephone as invalid (refer to [PeopleSafe - Obtaining an Email Address and Managing Messaging Platform Alerts (027674)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=918203d3-2d76-4044-b2d9-0ced0504d471).    Determine if the phone number in the system is correct: | | | | |
| **If the phone number is…** | | | **Then…** | |
| Correct | | | Perform the steps below to reset the Invalid Phone Indicator: | |
| **Step** | **Action** |
| **1** | On the Main screen, click the **Change Contact Info** button. |
| **2** | On the Contact Info screen, Select the radio button of the number listed in red then click the **Reset** button in the Phone section. |
| Incorrect | | | Perform the steps below to update the phone number: | |
| **Step** | **Action** |
| **1** | On the Main screen, click the **Change Contact Info** button. |
| **2** | On the Contact Info screen, click the **Add** button. |
| **3** | Type in the correct phone number. |
| **4** | Set the appropriate default indicator(s):   * Default Daytime (Home Delivery (Mail Order) default) * Default Nighttime (Home Delivery (Mail Order) default) * Text Messages (if cell phone)   A Default am and pm numbers must be selected, or the system does not allow Messaging Preferences to be set up via automated call. | | | | | |
| **5** | Select the appropriate settings for the family, as verified above in Step 2 & 3:  You can **only** update the member’s individual phone number and those for any minor children. Confirmation is required from the other adult members on the account before their individual contact information can be made permanent or default. | | | | | |
| **If the Phone Number Change Applies to…** | | **Then…** | | | |
| Member and minor children | | 1. Select the **Apply Changes to Family** checkbox.   **Result:** Screen refreshes and the other family members are displayed with a check mark next to their names.   1. De-select the **ALL-FAMILY MEMBERS** option and remove the checkmarks for those members not affected by the change. | | | |
| Member only | | Ensure that the **Apply Changes to Family** box is **NOT** checked. | | | |
| **6** | Click the **Save and Close** button. | | | | | |

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| MED D Add or Change Address, Phone or Email |

**** If the caller is a **MED D Beneficiary**, follow the steps found under [MED D - Address Changes and Out of Area (OOA) (030149)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0ba6dea9-4b34-4351-b06a-ec81046f6c0f) and [MED D - Email and Phone Number Changes (112972)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=e0799360-70cd-4d44-a8b0-3112e61449f3).

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| Placing a Refill Address Change |

Perform the steps below to process an address change when placing a refill:

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| --- | --- |
| **Step** | **Action** |
| **1** | Click on the **Order Placement** tab on the **Main** screen. |
| **2** | Select the check box next to the Rx# the member wants refilled then click the **Continue** button.  **Notes:**   * + When confirming the address and the member states the address is different, click on **the Change Contact Info** button and place the new address in the system.   + When an order is started using a “one-time” address and diverts to future fill it will release and choose the member’s default address on file, entering a date range will ensure that the prescription will ship to the correct address if it is put into Future Fill. |
| **3** | After adding the address, select the radio button next to the address that you saved and then click the **Select** button in the lower left-hand corner of the screen.  **Result:** Displays the new address up on the Refill screen. |
| **4** | Finish the refill and close the call. Refer to [Universal Care - Consultative Call Flow (CCF) Process (095822)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c954b131-7884-494c-b4bb-dfc12fdc846f). |

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| Open Order Address Changes |

The process for changing an address on an Open Order differs from a Permanent Address Change process listed above. When receiving calls from the member requesting an address change for an Open Order, the following should be used to determine if the request can be honored:

**Reminders:**

* Address changes on an open order cannot be completed online. The member would need to call Customer Service.
* Members or authorized 3rd party can make changes while the medication is in the Holding period, which is 8-23 days prior to anticipated medication depletion.

**Questions and Answers:**

* **Who can change an address or request an alternate address for an existing order (order already in process)?**

**Answer:** Authorized Third Party callers can make address changes for an open order for those who are under the age of 18, as well as for those who are age 18 or older. If there is a need to establish a permanent address change on file for the individual, then the legal guardian, cardholder, or Power of Attorney must call to change the address (legal documentation must be on file). Parents who are insured on the account can make permanent address changes for those under 18 as well. If a member is over 18 and the caller does **not** have legal documentation on file, ask if the member is available to make changes during the call. If the member comes on the line to approve the caller to update contact information, you must have the member re-authenticate before making any changes.

* **Is the member requesting a permanent or alternative address change while there is an (open order that is in process)?**

**Answer:** Be sure to verify with the member if they want allopen orders to be shipped to the new or alternative address. If yes, proceed to Step 1.

**Notes:**

* When an order is started using a “one-time” address and diverts to future fill it will release and choose the member’s default address on file, entering a date range will ensure that the prescription will ship to the correct address if it is put into Future Fill.
* **What is the status of the order?** The status of the order can be found by clicking on the prescription number.

Refer to the appropriate scenario below:

|  |  |
| --- | --- |
| **If the order status is…** | **Then…** |
| Scanned, Entered, Opened, or Adjudicated/Adjudication | * Address change request can be processed. * To complete the Address Change request, proceed to [Steps](#Steps) below. * This is the Holding period (8-23 days prior to anticipated medication depletion) when changes or cancel order are allowed. |
| Ready Label or Dispensing-Label Print | * Address Change request cannot be processed by normal means. * A [Stop tote (017745)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1232023a-60c7-4441-9013-17ecbd554451) can be sent by CCR’s with email access. |
| Packed, Metered, or Shipped | * Address Change request **cannot** be processed. * Order is sent to the address on the order. * If the member disputes this, follow current escalation policies and procedures. * If the order has shipped, CCR can reach out to senior for possible re-direct with shipping carrier. |

Complete the following steps:

|  |  |  |
| --- | --- | --- |
| **Step** | **Action** | |
| **1** | Review the status of the Open Order in the Order Status field.    The status on the main Order Status screen may be inaccurate, you **MUST** click the Order number from this page to confirm accurate status.  **Reminder:** The Address Change can be processed with any of the following statuses:   * Scanned * Entered * Opened | |
| **2** | Click the **Shipping Information** up arrow at the bottom of the Order Status screen. Scroll down to the Address field, click the **Change Contact Info** button.      **Result:** Contact Infoscreen displays. | |
| **3** | Click on the **Add** button on the left (middle of screen). | |
| **4** | Select appropriate **Address Type**and input the correct address.  Do not abbreviate the address. | |
| **5** | Set correct default indicator(s):   * MOR Primary * MOR Alternate * PCL Default Primary    If PCL Default Primary is selected, this is strictly a paper claim address.  **Example:** Mail Orders are shipped to their vacation address, but they file a paper claim and want their EOBs and Paper Claim reimbursement checks to go to a different address.     If **Alternate** is selected, the Effective and Expiration date must be entered.  When an order is started using a “one-time” address and diverts to future fill it will release and select the member’s default address on file. Entering a date range ensures the prescription ships to the correct address if it is added to Future Fill. | |
| **6** | Select the appropriate settings.   **Only**update the member’s individual address and those for any minor children. | |
| **If the Address Change Applies to…** | **Then…** |
| Cardholder and minor children | 1. Select the **Apply Changes to Family** checkbox.   **Result:** Screen refreshes and the other family members’ displays with a check mark next to their names.   1. Deselect the **ALL-FAMILY MEMBERS** option and remove the checkmarks for those members not affected by the change. |
| Member only | Ensure that the **Apply Changes to Family** box is NOT checked. |
| **7** | Select the appropriate **Change Reason** via the drop-down menu. Refer to the table below for definition of choices: | |
| **Short Version** | **Long Version** |
| CDH Request | Cardholder Request  Primary cardholder whose name appears on the CVS Caremark card |
| Correspondence | Notification by correspondence |
| Elg as Primary | Selected eligibility as primary |
| Email Received | Email received |
| Family Addr Req | Address applied to family |
| Fax Received | Received fax document |
| Legal Rep Req | Legal Representative Request  **Note:** Documentation must be on file that is valid under state law to support their legal authority to act on behalf of the patient. This may be a durable POA that was signed while the patient was still competent, or a court appointment of a guardian/custodian or some sort of legal documentation. |
| Member Request | Member Request refers to the Plan Participant over the age of 18 who is covered on the plan (other than the cardholder) |
| Pharmacy Call | Pharmacy Initiated Call |
| Scan Data Updt | Scan Data Update |
| Select Fmly Req | Address Applied selected family |
| Updt Eff / Exp | Effective / Expiration Updated |
| **8** | On the Contact Infoscreen, select the correct address that was updated by selecting the radio button to the left of the address. | |
| **9** | Click the **Select** button (ensures the updated address is entered into the Open Order).  **Result:** Order Statusscreen displays. | |
| **10** | Click the arrow in the payment and shipping toolbar to expand the section. | |
| **11** | Click the **Update** button to save address change to the order.    **Result:** Stores the changes properly. | |

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| Process Audit |

To retrieve details on when an address was added, changed/updated and by whom, this information may be reviewed under the Address Change Audit screen. Perform the steps below:

|  |  |
| --- | --- |
| **Step** | **Action** |
| **1** | On the Mainscreen click the **Change Contact Info** button.  **Result:** Contact Info screen displays. |
| **2** | Click on **View Audit** button to display the audit trial. |

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| International Addresses |

Mail Service ships orders to Canada; however, the address will need to be input by the pharmacy.

Inform the member that they are responsible for completing any paperwork required by Customs to allow the order to be shipped into their country.

Perform the following step:

|  |  |  |
| --- | --- | --- |
| **Step** | **Action** | |
| **1** | Identify the type of prescription(s) that need to be ordered.  **Note:** Restrictions may apply. Refer to [PeopleSafe - Shipping Guidelines and Fees and Order Tracking (004611)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=49a324cd-73b1-4e49-bdae-9ac58e18d184). | |
| **If…** | **Then…** |
| New prescription(s) or existing prescription already on file | Create a **Manual Refill** task and include the address in the comments. |
| Member is mailing in a new order | Contact the [Senior Team (016311)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9eef064d-c7d7-42f7-9026-1497496b4d51) or a supervisor to have an email sent to Participant Services notifying them of the address change. |

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| Resolution Time |

Varies based on situation.

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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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