# PeopleSafe - Alleged Non-Conformance and Call Pull Requests

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**Description:** Instructions for handling a claim or incident.

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| Reminder |

**Examples:** Include the member stating that we:

* Incorrectly translated a prescription.
* Incorrectly placed their new prescription or refill order. These requests are only honored if within 90 days from ship date (ship date is **Day 1**).
* Did not comply with the member’s wishes, such as applying a payment to the proper payment method or customer care representative (CCR) provided incorrect information. If the alleged error was made by a CCR, a request can be submitted to pull the call to verify.  
  **Note:** If a payment issue involves the installment payments, refer to [Copay Installment Payments (087380)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=9765cf50-e615-4720-83e4-32ad0bd81c64).

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| Alleged Error in Translation of a Prescription |

Perform the following steps:

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| **Step** | **Action** |
| **1** | Locate and click the order number containing the prescription number(s) of the medication in question.  **Result:** Order Status screen displays. |
| **2** | Determine if this request is within 90 days from ship date **(ship date is day 1)**.   * If request is within 90 days, go to Step 3. * If request **is not** within 90 days from ship date, inform plan member that return will not be accepted and no credit will be given. |
| **3** | Click the **Plus** (**+**) button for the prescription number to expand or display Prescription Details.   * Determine if there is a DAW, TIP, or CCM intervention indicated on the screen. If so, refer to [Intervention Changebacks (004594)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=92f4cbaf-20a3-4f57-a897-7b2f9f1b4f36) procedure. * Determine if a change was made to the prescription due to doctor call/fax. If so, inform member.   + If we have incorrectly translated the fill or refill, ask member to hold and [Warm transfer (066076)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0) to [Clinical Care Services Clinical Counseling (004378)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f22eb77e-4033-4ad9-9afb-fc262f29faad)     - Ensure Clinical Care Services are within their hours of operation.     - Continue to **warm** transfer when the matter is **complicated or escalated**. These are not appropriate calls for a cold transfer.     - Continue to **warm transfer Medicare D** members.     - Check client specific process. |

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| Alleged Error in Placing Order |

Perform the following steps:

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| **Step** | **Action** | | |
| **1** | From the  click on the prescription number to access  to verify what the member intended to order:  Rx Number  Name of Medication  Strength  Quantity  Compare member’s intentions with what was ordered. | | |
| **2** | On the , locate the order containing the prescription in question. | | |
| **3** | Verify how order was received:   * Web * IVR * CSR * Phone * ERX * Mail * Auto Refill * Auto Renewal * SMS Text   **Tip:** Information located on the  on the left side of the screen in Prescription List Detail.  **Note:** If the order was received by Web or IVR, determine if the member made the error in inputting the information. | | |
| **If…** | **Then…** | |
| Yes | Determine if the plan allows for an override to utilize an early fill. | |
| **If…** | **Then…** |
| Yes | Proceed with process to request override. |
| No | Advise the member that they are responsible for 100% of the out-of-pocket cost for the replaced medication. |
| No | Proceed to the next step. | |
| **4** | Review the following screens:   * Activity Screen * View Comments * Transaction History * Order Status (Settlement Codes, Conflict Codes, and Prescription Notes) * theSource Plan Design | | |
| **5** | Determine if there was CCR or PBM Non-Conformance in processing the order, by reviewing the above screens for errors. | | |
| **If…** | **Then…** | |
| No | Educate the member that the information is accurate. | |
| Yes, and the order is in process **and** the order can be canceled | Refer to [Cancel Order, Prescription Refill or New Prescription (004761)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c67b914f-1f29-4331-9bf1-d79214260f5f). | |
| Yes, and the order has shipped or is beyond the point of canceling **and** there was a PBM error in translating | [Warm transfer (066076)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0) to Clinical Care Services.   * Ensure Clinical Care Services are within their hours of operation. * Continue to **warm** transfer when the matter is **complicated or escalated**. These are not appropriate calls for a cold transfer. * Continue to **warm** transfer **Medicare D** members. * Check client specific process.   **Result:** Clinical Care Services discusses with the member and issues a copay credit if appropriate. | |
| Yes, and the order has shipped or is beyond the point of canceling **and** there was a CCR error in placing the order | Refer to [Alleged Error Requiring a Call Pull.](#_Alleged_Error_Requiring) | |

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| Alleged Error Requiring a Call Pull |

Calls may be pulled and reviewed when the member believes they were provided incorrect information or an order was placed incorrectly by a CCR.

**Examples**: Include CCR ordered incorrect medication, misquoting pricing, eligibility for a return/mail tag, or providing clinical advice. A call may also be pulled if the member reports being mistreated by a CCR (failing to be courteous, yelling at the member, etcetera).

Perform the steps below when handling an issue of non-conformance:

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| **Step** | **Action** | | |
| **1** | Locate prescription in question from the . | | |
| **2** | Review these screens to validate CCR/PBM non-conformance:   * Activity Screen * View Comments * Transaction History * View Problems (View Notepad, View Versions, View Settlement Codes) * View CIF in theSource * View Plan Summary | | |
| **If the CCR determines that…** | **Then…** | |
| No, there was no non-conformance | Educate member that the information is accurate. | |
| Yes, there was non-conformance | Determine the nature of the Non-Conformance. | |
| **If the non-conformance was...** | **Then…** |
| Due to CCR error. | * Gather all applicable information. * Contact the [Senior Team (016311)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9eef064d-c7d7-42f7-9026-1497496b4d51) for further assistance.   Issue ship free credit if able to recognize between PBM Non-Conference or CCR error:  **Example:** Member calls to escalate because they were charged $17 or received $23 credit in error. Verify and adjust shipping fee. |
| Clinical | [Warm transfer (066076)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0) to [Clinical Care Services Clinical Counseling (004378)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f22eb77e-4033-4ad9-9afb-fc262f29faad).   * Ensure Clinical Care Services are within their hours of operation. * Continue to **warm** transfer when the matter is **complicated or escalated**. These are not appropriate calls for a cold transfer. * Continue to **warm** transfer **Medicare D** members. * Review client specific processes.   **Result:**  Clinical Care Services discusses with the member and issues a copay credit, if appropriate. |
| There is **no** supporting documentation within the member’s file to indicate if there was non-conformance | Contact the [Senior Team (016311)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9eef064d-c7d7-42f7-9026-1497496b4d51) for assistance and to determine if a call pull is necessary. | |

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| Resolution Time |

For orders, refer to [Order Shipping Turn Around Time (TAT) (018691)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3338f261-4696-4e84-9019-43cc2eef3352).

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| Alternatives |

Refer to Plan Design for retail options.

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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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