# PeopleSafe - Payment Fill and Bill

[Process](#_Toc204056726)

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**Description:** Provides information on the Fill & Bill product which is client-specific and allows the member to have a bill sent with their order, instead of paying upfront with an electronic method of payment or check/money order.

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| Process |

**Reminder:** The maximum balance amount is client specific and can be found in the CIF Client Specific Process Section or Peoplesafe in the Order Screen.

Perform the following steps:

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| **Step** | **Action** | |
| **1** | Access the **Order Placement** screen. | |
| **2** | Place the plan member’s prescription refill order following the standard procedure. | |
| **3** | On the **Order Placement Refill Summary** screen, determine if the **Bill Participant button** is displayed. | |
| **If…** | **Then…** |
| **Displayed** on the Refill Summary screen | Click **Bill Participant** button **ONLY** if the member requests an invoice with the order.   * If over the available amount due limit, obtain information for an electronic method of payment.   **Reminder:** The maximum balance amount is client specific and can be found in the CIF – Client Info (Figure 1 below) or PeopleSafe in the Order Screen (Figure 2 below).  **Examples:**    **Figure 1: CIF – Client Info**    **Figure 2: Order Screen in PeopleSafe**  Refer to [Payment Maintenance Add, Edit and Remove (Credit Card and eCheck) (010987)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=b0d1693e-3ebd-45e7-811a-adbe7e2c9f83). |
| **Not Displayed** on the Refill Summary screen  **And**  **CIF states Client does** allow Fill & Bill | Submit a manual refill request by creating the following task:   * **Task Category:** Order Placement * **Task Type:** Refills Request – Manual * **Queue:** Order Placement – Participant Services * **Note:** Automation not working – Fill & Bill Client   **Reminder:** A manual refill task cannot be used for a prescription that has no refills. Follow the process for FastStart. Refer to [Obtaining a New Prescription (Rx) for the Member (058827)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=a1443f4f-499e-442c-be11-fd2b207bf86c). |
| **Not Displayed** on the Refill Summary screen  **And**  **CIF states Client does not** allow or has no information for Fill & Bill | Member would need to use an electronic method of payment.  Refer to [Payment Maintenance Add, Edit and Remove (Credit Card and eCheck) (010987)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b0d1693e-3ebd-45e7-811a-adbe7e2c9f83). |
| Member has a $0 copay | Click **Save Order** button.  **Notes:**   * If Save Order button is not displayed and/or the member does not wish to have a payment method on file: Open a Manual Refill Task. Refer to [PeopleSafe - Manual Refill (027179)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=eea92f37-f941-4237-9b9e-af999ad68e8f).   If the plan is not a fill & bill client and they do not have a history of being billed later, do not offer to send a bill. If the call is escalated reach out to [Senior Team (016311)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9eef064d-c7d7-42f7-9026-1497496b4d51). Remind the member that sending task will not guarantee a bill will be sent it is only a request. |

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| Resolution Time |

Immediate

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| Related Documents |

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

**Parent Document:** [CALL 0011 Authenticating Caller](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0011)

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