# M3P Request for Information (RFI) Process

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**Description:** This work instruction covers the steps to complete the Request for Information (RFI) process from the **Pending** queue in Captiva.

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| Request for Information |

If all the required information is available on the paper election form and you can find active Part D coverage for the member, but the form is missing a signature from the member or their AOR/POA…

Follow the steps below:

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| **Step** | **Action** | |
| **1** | Determine if the member is contacted: | |
| **If…** | **Then…** |
| Member is contacted… | “I’m calling because we received a paper election request to opt-into the Medicare Prescription Payment Plan and it was missing a signature so we need to get verbal attestation to the [Terms & Conditions](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a14af54-a431-4a96-9021-37075f724bf6) under Step 5, before we can complete the request.”  Read terms & conditions, obtain member attestation, follow the [opt in process](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a14af54-a431-4a96-9021-37075f724bf6).  **Note**: If member states they no longer want to opt-in, add comment in Captiva with exception reason, date/time of outreach and outcome of call and select **Election Withdrawal** + Submit |
| If the member does not answer… | Select the corresponding HCF Plan ID in MPPP360 that is found on the bottom of the paper election form and enter member MBI then click on ‘Search’. |
| **2** | Select the **Opt in Now** button in the prescription payment plan opt-in status section. | |
| **3** | In the MPPP360 Opt-In tab:   * Enter effective date (during AEP this will be 01/01/2025, during the plan year default to current date) and source **Paper Form**.   The **Application Date Time** field should auto-populate to current time in PST.   * Enter **Application Date** (current date). * Enter **Application Received Date** (should usually be current date unless there’s been a delay). * Enter Authorized Representative details in MPPP360 Opt-In tab (if applicable) tab. * Select **Next** button. | |
| **4** | Upload letter image (unique ID) in MPPP360 Opt-In tab using image location in Captiva UI.   * Click **copy** on the image path in Captiva      * Click **browse** in the supporting documents section in WiPro then paste the file path into the **file name** field in the file explorer pop-up. * Select **Paper Enrollment** in the Document Type drop down | |
| **5** | Check the **Pend** box. The **Opt-In Status** drop down will default to RFI. Click **Submit**.    **Note**: Member Opt-In status will be updated to Pending status in MPPP360 portal. | |
| **6** | A pop-up window asking‘**Are you sure you want to update**? will display – click **yes**. | |
| **7** | Now that the member’s election request is in pending status, navigate to the Billing Portal in MPPP360 to trigger the RFI letter. | |
| **8** | In the **Member** tab of the billing portal copy the MBI into the **Plan Member Id** field and click search. This should populate the member information to find the M360 ID. Copy this ID. | |
| **9** | Go to the **Letter Request** tab. Click **New Letter Request** button. | |
| **10** | Select **Member** in the **Source** dropdown and paste the M360ID into the M360 ID field and hit **Lookup**. This should populate the member details below.  Choose **MPPP-Request for Additional Information Letter** in the **Description** drop down. | |
| **11** | Checkmark the box for the appropriate RFI reason, then select **Create**. | |
| **12** | In Captiva, Select **RFI Letter** + Submit | |
| **13** | A **Submission Successful** pop up will display to confirm you completed the image disposition. Click **OK** when you’re ready for the next image to populate. | |

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| Releasing Pending RFI Status in MPPP360 |

If a member responds via phone to the RFI letter within 21 days, a task will be sent from Care to release the pending status in MPPP360.

Follow the steps below:

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| **Step** | **Action** |
| **1** | In the Billing Portal go to the **Workflow** tab. |
| **2** | In the **Medicare ID** field, enter the member’s MBI and click **search**. |
| **3** | To change the case status, you must first assign the case to yourself. Select the checkbox next to the case you are working then click on **transfer selected**. |
| **4** | Find your name in the **To User** drop down and enter comments with the COMPASS Support Task or PeopleSafe RM Task # you are working along with a note that the member provided verbal attestation to change status to Opt-In.  **Example**: RM TASK #123/COMPASS TASK #123, member confirmed terms and conditions, changed status to Opt-In. |
| **5** | A pop up will display asking if you are sure you want to transfer selected cases – click **yes**. |
| **6** | Another pop up will display confirming the transfer was completed successfully. Click **ok**. |
| **7** | On the left side of the Workflow tab, change the **assigned to user** drop down to your name. Make sure case status is set to **OPEN**. And hit **search**.  All the open cases assigned to you should now populate on the screen. |
| **8** | Select the case you are working and then click **resolve**. |
| **9** | The member details will display below. Select **model segment** then change the status to **ACTIVE-Opt-In** and click **update**. |
| **10** | A pop up will display asking if you are sure you want to update, select **yes**. |
| **11** | Another pop up will display confirming you updated the status to ACTIVE with a confirmation number. |
| **12** | Close the Support Task/RM Task following the steps in [**M3P Compass- Working Support Task**](TSRC-PROD-073329) |

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