# Universal Med D – Requests to Account Management Through Nintex

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**Description:** This document provides instruction on submitting a request via the Form-to-Case process using a Nintex formfor request and inquires for MedD account management.

**Note:** Please bookmark the [Med D Account Management SharePoint](https://aetnao365.sharepoint.com/sites/AetnaSSIMedDAcctMgmt) for easy access to the forms and other important information.

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| Process |

To send a request to the AM Team using **Nintex**, follow the steps below:

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| **Step** | **Action** |
| **1** | Click the Inquiry/Request Form link ([Nintex Form](https://aetna-537298.workflowcloud.com/forms/ae90571f-58f9-4ad7-8f5a-0c5493fe719b)) or navigate to the Med D Account Management SharePoint site and select the Inquiry/Request Form. |
| **2** | Once the form populates, enter your **Name** and the **Carrier ID**; the gray boxes will auto populate with the rest of the required information. Add your backup partner and the **Solon Senior FollowUp Team** to the “*include these people on the email*” field of the form.    **Notes**:   * Group/team emails cannot be used in the **Your Name** or **Notify** **this additional person** fields. The group/team email can be CC’ed in the email by being entered into the **Description** field. * The Carrier ID **cannot** include an ‘x’ and should auto populate the Client details with the correct Carrier ID. * Some Carrier IDs will not automatically populate information in the gray boxes. The form is functioning properly in these instances and will still be routed correctly. The Carrier ID itself is most important to our triage process. |
| **3** | Click the Subject drop down and select the appropriate one for your request. |
| **4** | Fill out the rest of the information in the **Member ID** and **Description** fields.  If there are any Escalations or Urgent requests, please note this at the beginning of the **Description** field so the team will see it. If needed, an email can be send to the [RS9040@CVSHealth.com](mailto:RS9040@CVSHealth.com) in extremely urgent circumstances.  **DO NOT** include any member information in the description. |
| **5** | It is **required** to attach the [PHI/PII Form](https://aetnao365.sharepoint.com/sites/CSXSalesforceEnhancements/_layouts/15/download.aspx?UniqueId=b79ea3a9%2D901d%2D463c%2Dbe26%2Dbd5502f893b7) and any documents that are necessary to the bottom of the form (paper claim receipts/documents, grievance template requests, etc).  **Note:**   * The Internal ID field does not need to be completed. The PHI Form **only** needs the information that is relevant to each request. * This form can be used to provide the members name and/or prescription information that might not be provided on other attachments. There is also a link to the PHI/PII Form on the [Med D Account Management SharePoint](https://aetnao365.sharepoint.com/sites/AetnaSSIMedDAcctMgmt). |
| **6** | Confirm all the information in the form is correct. Click **Submit**.   * An email confirmation will be sent to the form submitter stating the request has been received. This email will contain the Salesforce case number and link, and an estimated turnaround time for the case to be completed. The Med D Account Management Triage Team will assign the case to the appropriate Account Manager. |
| **7** | You will receive a response to the request via email within **5 business days**. If you have questions or require follow up prior to the Account Manager response, you can contact the teams shared email box at [RS9040@CVSHealth.com](mailto:RS9040@CVSHealth.com).  Please wait the estimated turnaround time before reaching out for status updates. |

[Top of the Document](#_top)

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