Healthcare Services Learning & Performance

FG

RxE – RTM System - Based Actions

Duration

360 minutes

Prep-work

- Review the lesson and PowerPoint presentation
- Procure diverse member IDs to be used in RTM Training environment for demonstrations and practice activities.
- For large classes:
  - If there are enough RTM logins for all participants, you can allow them to practice using the system individually during the activity sessions.
  - If there are limited RTM logins, you can create breakout rooms for them to practice using the system with SME guidance during the activity sessions (there must be a login for each SME leading a breakout room – SME's can allow participants to control their screens during teach-backs/practice).
  - If there is only a single login available, allow participants to control the host's screen (with permission) to practice/teach-back using the system during the activity sessions.

Materials

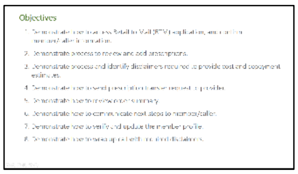
- RTM System Navigation PPT
- RTM System Navigation PG

Pre-requisites

- RxE RTM Access Application
- RxE RTM Member Info Screen
- RxE RTM Prescriptions Tab – Existing Rx
- RxE RTM Prescriptions Tab – New Rx
- RxE RTM Diabetic Supplies Tab
- RxE RTM Send Quote
- RxE RTM View Order Summary Tab – Prescriber Info Review
- RxE RTM Update Checkout
- RxE RTM View Order Summary Tab – Provider Verification
- RxE RTM Create Note

Resources

- RxE Rebuttals to Member Objections
- RxE RTM Eye and Ear Drops Guide
- RxE RTM Inhaler Pricing JA
- RxE RTM Pricing Insulin JA
- RxE Call – Systems-Based Actions Call Closing
- RxE Call – Systems-Based Actions Price Estimate
- RxE Call – Systems-Based Actions Request Permission
- RxE Call – Systems-Based Actions View Prescriptions
- RxE Verify Fax Number Hierarchy JA
- RxE OMS Verify Provider Fax JA
- Associate Jacksonville SharePoint site (Concentrix BPO advocates only)
- RxE Welltok Verification



Introduction

Retail to Mail (RTM) is an application utilized by both Humana and our pharmacy advocates to help members by faxing their prescriptions to Humana's mail-delivery pharmacy.

In this lesson, you will see demonstrations and complete hands-on activities representative of the functionality available in the Retail to Mail application.

Objectives

After completing this lesson, you will be able to:

- Demonstrate how to access the Retail to Mail (RTM) application and confirm member/caller information.
- Demonstrate process to review and add prescriptions.
- Demonstrate process, and identify disclaimers required, to provide cost and copayment estimates.
- Demonstrate how to send a prescription fax request to a provider.
- Demonstrate how to review request summary.
- Demonstrate how to communicate next steps to member/caller.
- Demonstrate how to verify and update the member profile.
- Demonstrate how to wrap up a call with required disclaimers.

If you have not done so already, please locate the participant guide for this lesson in the Learning Center.

Part One Process Steps:

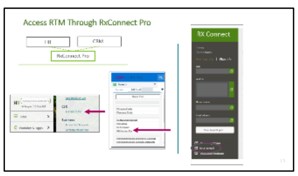
- **Access application, search for the member, obtaining consents, and filling the Associate View – Member Information screen**
- **Review the Prescriptions Tab (existing RX), adding a new Rx, removing an Rx from the cart**
- **Filling the Diabetic Supplies Tab, providing estimates, sending a price quote, and saving a session**

{TRAINER NOTE}

The maximum time limit for Part One is 120 minutes. If the system is available, run a live demo. If the system is not available, use slides. **Note:** Authentication, Power of Attorney, and CRM were covered in previous lessons.

Topics to be demonstrated:

- Accessing RTM through Hi! and CRM
- Associate View: Member Information: Viewing and confirming member information or documenting non-member caller and how POA was confirmed; documenting how caller heard about Humana mail-delivery pharmacy.
- Seeking consent to view Humana prescription claims, statements to be read verbatim, and outcomes in both scenarios (yes and no)
- Pricing disclaimer and statements to be read verbatim

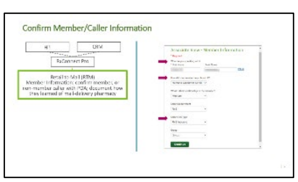


Show **Access RTM through RxConnect Pro** slide.

Retail to Mail (RTM) is accessed through *RxConnect Pro*. There are two ways to access RxConnect Pro:

- In *Humana Hi!* >> *Self Service* (HSS), *RxConnect Pro* is in the CSR section.
- In CRM production, *RxConnect Pro* is listed in the Quick Find section.
- The best practice is to access RxConnect Pro via the CRM.
- Once *RxConnect Pro* is open, if access through the Hi page, input the member's Humana ID in the Search Field, and then select *Retail to Mail* in the lower part of the left side panel.

Show **Confirm Member/Caller Information** slide.

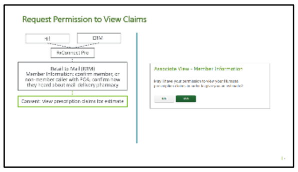


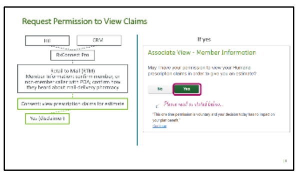
In the *Retail to Mail* (RTM) application, the first screen you see is the *Associate View – Member Information* page.

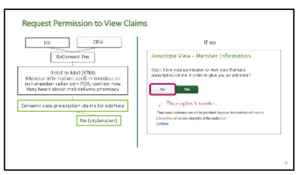
- The first and last name of the member will automatically populate at the top.
- If you are not speaking with the member, select Other.
- Then, a new space will open. You can delete the name from the name fields and input the name of the person to whom you are speaking.
- After entering the name, a new question populates; "How did you verify POA with the caller?"
    - You must indicate how permission was obtained from the member to share Private Health Information (PHI) with this caller. This information is important because it will populate in the automated RTM note.
    - The options to select are: Verbal Approval or POA/Consent Form.
    - Next, ask how they heard about our pharmacy and select the appropriate response from the drop down menu.

- Under Select Department, the answer auto populates to RxE
- If you select Call Type, notice the different options that are available.
  - The RxE Vendor selects RxE Inbound for both Welltok and Inbound.
- Click Continue once you are finished collecting the caller information.

Show **Request Permission to View Claims** slide**.**







You must ask for permission to view the prescription claims.

- Read the Consent statement **verbatim**:
  "May I have your permission to view your Humana prescription claims in order to give you an estimate?"
  - If the member agrees, select Yes and read the note verbatim:
    "This one time permission is voluntary and your decision today has no impact on your plan benefit."
- If the member disagrees, select No. This will automatically suppress the Existing Prescriptions list in RTM.
- Keep in mind that if you select No, you must explain **in your own words** that you can provide copay estimates, but the member will need to provide the names and strengths of the medication. For example, you can say:
  "Copay estimates can still be provided, however, you will need to provide the names and strengths of the medication."

NOTE:

- It is very rare for members to say no and most of the time, when they are told what they need to do, they change their mind and agree to provide consent.

Show **Pricing Disclaimer** slide**.**

Medications the member has filled in the last six months (based on claims made to Humana from retail pharmacies) will populate in the **Prescriptions** tab.

- Read the pricing disclaimer verbatim:
  "The prices I am about to give you are only an estimate, based on your current prescriptions in our system at this time. Actual costs are determined by your prescription drug benefit, the quantity, strength, and dosage of the medication, along with the order or stage you are in when your medications are purchased plus applicable tax."
- Review with the member the name, strength, and savings of all the medications being requested. Select the box next to the *Important message.

NOTE:

- You MUST read the pricing disclaimer before providing estimates.

{TRAINER NOTE}

Show **Call Listening: Request Permission** slide**.**
-Use the call file RxE RTM Systems Based Actions - Request Permission. The call file is embedded on this slide, but also available in the Learning Community.
-Hover over the talking icon on this slide to play the call.
-Learners refer to Call Listening: Request Permission in the participant guide

Now that you have an idea of what the process looks like to gain consent. Let's listen to the first part of a call to hear how the advocate gained consent.

- What information did the advocate gather from the member?
- Did they read the consent statement verbatim?
- Did they read the pricing disclaimer verbatim?

{TRAINER NOTE}

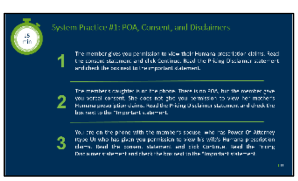
Complete the practice scenarios outlined in the PowerPoint. Depending on the number of logins available there are a few ways you can approach the practice sessions:

1. If there are enough logins for each participant, send them out to practice on their own. Remain available to answer questions.

2. If you only have a few logins available, you can divide the class into cohorts and send them out to breakout rooms with co-facilitators or SMEs. The co-facilitators or SMEs can allow participants to control their computer to practice.

3. You can allow participants to control your computer to practice. This option will take the longest because each participant would have to practice separately instead of concurrently.

Keep your chosen procedure in mind in all upcoming scenarios.



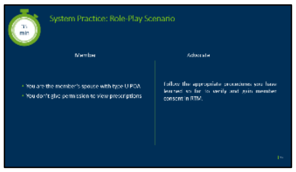
Show **System Practice #1: POA, Consent, and Disclaimers** slide**.**

Take a moment to practice gaining consent and reading the disclaimers in RTM. You will complete each activity that is listed on screen on your own. Make sure to follow the correct process in RTM. If you need help, refer to the System Practice #1: POA, Consent, and Disclaimers process checklist in the participant guide.

{TRAINER NOTE}

Show **System Practice: Role-Play Scenario** slides**.**

-Separate learners into pairs
-Tell learners that the information for this role play scenario is also listed in their participant guide as System Practice: Role-Play Scenario.
-Allow learners to decide who will play the role of member, and who will play the role of advocate. Learners will have the opportunity to take turns playing each role.
-Instruct the advocate to access the RTM system and gather the appropriate information from the member to complete the process
-Instruct the advocate to follow the appropriate procedures, and read the required statements to the member



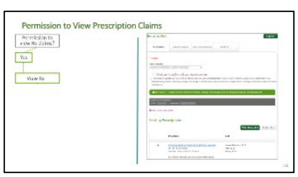
Now let's apply what you've learned so far. You will have the opportunity to work with a partner to practice a role-play scenario. Using the RTM, take turns playing the role of the member and advocate. Gather the appropriate information from the member to complete the process.

{TRAINER NOTE}

If the system is available, run a live demo. If the system is not available, use slides.

Topics to be demonstrated:
- Viewing prescription claims when permission is granted
- Adding prescription information when permission is not granted
- Adding unlisted/new prescriptions (required fields, and name brand/generic)

Show **Permission to View Prescription Claims** slide.



If permission to view Humana prescription claims has been given, confirm the member's name in the member dropdown menu, and then view the existing prescriptions. Offer to review all the medications listed under Existing Prescriptions. Make sure to read the information from left to right.

- For all medications individually, provide the:
  - name
  - strength
  - price (retail price, Humana price, and savings as listed in RTM).
- Click the check box next to the name of the prescription if the member wants it filled by our pharmacy.
- If you need help with medication pronunciation, click over the prescription name for additional drug information. The Drug Information page provides advocates guidance on phonic pronunciation of the medication name - **no other information from that page should be shared with the member – including saying what the medication is for**.

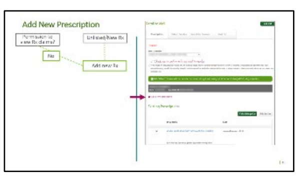
NOTE:

- Unless the medication is 30-day restricted, RTM will always display 90 day estimates. Test claims in RxNova Call Connect need to be performed for 30 or 60 day estimates.
- Most estimates for a 30-day prescription cannot be assumed to be the cost of a 90-day prescription divided by three.
- Human Pharmacy will fill prescriptions the way a doctor writes them, but faxed requests, which we will discuss later in the process, can only be sent for 90-day supplies.
- Do <u>not</u> provide retail estimates from past claims because:
    - Past claims may be from a Non-Preferred Retail Pharmacy and
    - The past claims may be from a different plan stage (which are shown in *RxConnect Pro)*

RTM estimates are an apples-to-apples comparison of *Preferred Mail Order* to *Preferred Retail*. You learned several sales best practices during the RxE Sales Tools for Confidence lesson that will help you present sales estimates to members. As a reminder, the sales best practices include:

- Having a high-energy and friendly tone of voice
- Finding common ground and building rapport with members
- Having the right mind-set
- Sharing your knowledge of pharmacy services
- Having the ability to respond to unusual situations

For this lesson, we are just focused on learning the system.



Show **Add New Prescription** slide.

If permission to view Humana prescription claims has NOT been given, prescriptions will not auto-populate. The only way to provide price/copayment estimates is to add them manually and run the cost calculation.

Adding prescriptions manually is ALSO done when:

- Advocate asks member if there are any other unlisted medications for which the member would like price or copayment estimates.
- There are new prescriptions to add to the member's profile to be filled by Humana mail-delivery pharmacy. You can add up to 31 medications using the *Add a New Prescription* feature.

Complete all required fields in order to return an accurate match.

- Start typing the name of the medication under **Drug Name**. A list will start to appear, but **do not** type the entire medication name. RTM won't accept the entry.
- Select the drug name.
- Then, select the **Dosage, Package, # Taken / # Packages,** and **How Often.**
    - Keep in mind that the As Needed option is not available under How Often.

- As Needed is reserved for drugs that occur less than once a month (i.e. vaccines, flu shots, etc.) and only auto-populates for special medications.
    - You should only use the As Needed selection when RTM defaults to As Needed.
    - You can check with Clinical Services to help determine if a medication would use the As Needed selection.
    - Keep in mind that when a member says a medication is taken as needed, they are referring to the directions. In this case, you should ask the member what quantity the doctor prescribed for a 30-day supply.
- Lastly, in your own words, ask the member *"Are there any additional medications you would like an estimate on?"* or, *"Do you take any additional medications you would like an estimate on?"*

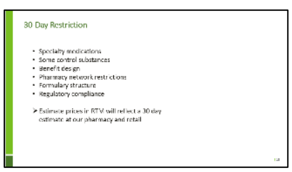
NOTE:

- You can add up to 31 new prescriptions.

When the brand medication has a generic equivalent, the information will populate under the Brand Name.

- Complete all necessary fields under the brand name.
- Pricing can calculate for brand <u>or</u> generic, but not both at the same time.
- Select the radio button for either the brand or generic equivalent.

Show the **30-Day Restricted Medications** slide



Humana insurance has implemented a 30-day restriction through our pharmacy and retail pharmacies on certain medications for a variety of reasons. These reasons include:

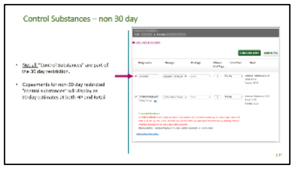
- Specialty medications
- Some controlled substances
- Benefit design
- Pharmacy network restrictions
- Formulary structure
- Regulatory compliance

Estimates provided in RTM will reflect a 30-day estimates at our pharmacy and retail pharmacies for the restricted medications.

When entering the specialty medications in RTM, a message populates. You will need to read the information in the message to the member including the phone number and hours of operation.

For specialty medications, offer to transfer the member at the conclusion of the call.

Show the **Controlled Substances – non 30-day** slide

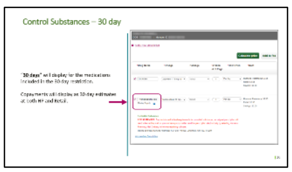


It's important to remember that not all controlled substances are part of the 30-day restriction. 30 days will display for the medications that are included in the 30-day restriction.

Copayments are different for 30-day and **non-30-day** restricted controlled substances.

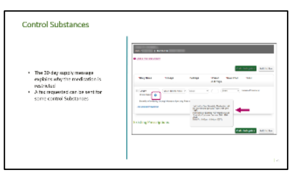
- Copayments for **non-30-day** restricted controlled substances will display as 90-day estimates at both our pharmacy and retail.

Show the **Controlled Substances –30-day** slide



- Copayments for **30-day** restricted controlled substances will display as 30-day estimates for both our pharmacy and retail.

Show the **Controlled Substances** slide



When you hover over the question mark icon next to the 30-day Supply text, a message appears. Read this information to the member if they ask why the medication is restricted to a 30-day supply.

The member's questions need to be directed to their plan benefits (the number on the member's Humana ID card).

NOTE:

- A fax request can be sent for some controlled substances
- 30-Day restricted medications will be on their own fax template when sent to a provider office
- RTM will display a message when a fax request is restricted along with the options for submitting the medications. You should provide all the options to the members.
- DO NOT inform members to keep these items locally, because our pharmacy will fill it at either 30 days or 90 days depending on whether the controlled substances is part of the 30-day restriction.

{TRAINER NOTE}

If the system is available, run a live demo. If the system is not available, use slides.

Topics to be demonstrated:
- Calculating price estimate and identifying supply period (30/60/90-day).
- Calculating copayment estimates, and sample statements if copayments through Humana mail-delivery pharmacy are not competitive.
- Sending a fax request to the provider via embedded fax capability.

Show the **Calculate Price Estimates** slide.

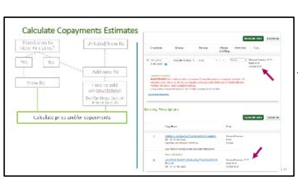
In order to calculate the price estimate, you will need to complete all the required fields including the diabetic supplies tab. The Diabetic Supplies tab needs to be reviewed before clicking the Calculate Price button. The Diabetic Supplies tab will be a plum color if it needs to be reviewed. Otherwise, it will be greyed out indicating it does not need to be reviewed.

- You will need to ask the member if they need diabetic supplies. The member's response will automatically populate in the call notes.
- If the member does not need supplies, continue to the View Order Summary tab
    - Always make sure you've selected the radio button to the left of each medication that is on the list, as well as any added medications or supplies.
- Then select Calculate Price

NOTE:

- Estimates are for 90-day supply unless labeled 30-day.
    - When the member wants a 30-day estimate for a 90-day listed estimate then use RxNova Call Connect. You will learn more about this in a lesson later on.
    - When a provider submits a 30 or 60-day prescription, Humana Pharmacy will fill the prescription as such.
    - Inform the member if they want a day supply less than 90 days to have the provider submit the prescription by escribe, fax, call, or mail in. (Member can also mail in the prescription)

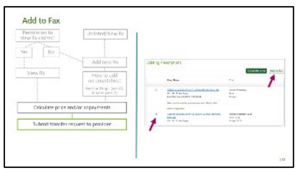
Show the **Calculate Copayment Estimates** slide.



For all medication estimates, provide our Pharmacy price, Retail Price, and Savings for each in any order.

- When there is no savings, say “There is no savings, but you will get all your medications from one pharmacy with no shipping or handling cost.” **Do not** skip this statement, as often convenience is more important to the member.
- Do not proactively suggest that the member keep a medication at a local pharmacy because of savings.

Show the **Add to Fax** slide.



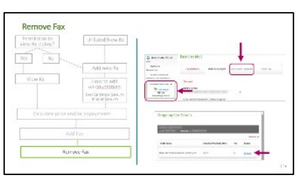
Make sure all radio buttons are selected for medications and or diabetic supplies to be Faxed to the provider.

- Unselect the radio button for any medication that is not to be faxed to the provider.
- Then click Add to Fax
    - RTM will display the total order cost and allow access to the View Order Summary Tab

NOTE:

- The shopping cart displays the total order cost as well as the total savings.
- If you click on the cart, a new window opens displaying detailed information about each prescription including the tier number.

Show the **Remove Fax** slide.



If a member changes their mind and they don’t want a prescription, you can remove the information from the fax. There are two ways to do this either from the checkout cart or from the view order summary page. Each option offers a link to remove the item(s).

You should always verify with the member which medication(s) they want to remove. Do not assume. You can remove the medication(s) individually or remove them all.

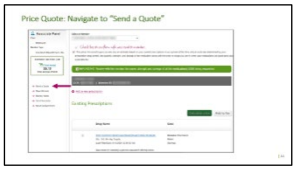
{TRAINER NOTE} <<

If the system is available, run a live demo. If the system is not available, use slides. Topics to be demonstrated:

- Navigating the Associate Panel to get to the “send a quote” section to send the member a quote for the items included on the fax request from our Pharmacy.

- Select method of mail (email or letter)
- Confirm quote sent - Save session (with notes)

-Show **Price Quote: Navigate to “Send a Quote”** slide.



There are several reasons a member may request a price quote. For example, they might want to share the quote with a doctor, friend, family member, or receive something in writing prior to making a decision. If a member declines our mail order service, you should offer to send a price quote letter. The letter will serve as a reminder for the member to call us back.

You can send a price quote to the member by email or letter for the items included on the fax request to their provider. Sending a price quote is optional and it can be sent at any point during the RTM process.

To send a quote, select Send a Quote from the Associate Panel. This will generate an estimated price quote.

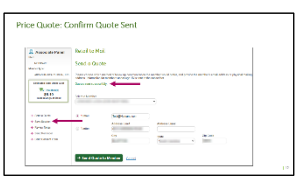
Show **Price Quote: Select Letter or Email** slide.

Next, determine if the member would like their price quote via email or letter. Select the appropriate radial button. Then click Send Quote to Member.

NOTE:

- Email option will include a link to HumanaPharmacy.com to price their medications.
- Price quotes for adult-aged dependents should be sent to the dependent.
- Price quotes for dependents under age 18 will be addressed to the member.

Show **Price Quote: Confirm Quote Sent** slide.

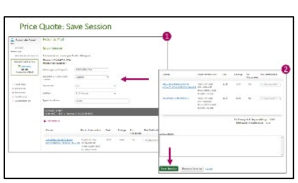


If completed successfully, a *Quotes sent successfully* message displays.

NOTE:

- To return to the “main screen/page”, click the Cancel button located next to the Send Quote to Member button.

Show **Price Quote: Save Session** slide.



During your call, a member may ask to end the session and complete the process later on. This is not a typical request, and rarely occurs.

If the member has to end the discussion before the fax request can be completed, the RTM session can be saved so information already discussed with a member is retained for when they call back. Use the Save Session link in the Associate Panel to retain the session information.

Confirm the selection menus are listed correctly and update any items that are not accurate.

Then click the Save Session button at the bottom of the screen.

{TRAINER NOTE}

Show **Call Listening: View Prescriptions** slide**.**
-Use the call file RxE RTM Systems Based Actions- View Prescriptions. The call file is embedded on this slide, and is also available in the Learning Community.
-Hover over the talking icon on this slide to play the call.
-Learners refer to Call Listening: View Prescriptions in the participant guide

Now that you have an idea of what the process looks like to view and add prescriptions. Let's listen to part of a call to hear how the advocate reviewed the prescriptions.

- What information did the advocate gather from the member?
- What questions did the advocate ask about the prescriptions?

{TRAINER NOTE}

Show **Call Listening: Calculate Price** slide**.**
-Use the call file RxE RTM Systems Based Actions- Price Estimates. The call file is embedded on this slide, and is also available in the Learning Community.
-Hover over the talking icon on this slide to play the call.
-Learners refer to Call Listening: Calculate Price in the participant guide

Now that you have an idea of what the process looks like to provide price estimates and communicate next steps. Let's listen to part of a call to hear how the advocate communicated this information.

- What information did the advocate verify with the member?
- What questions did the advocate ask?
- What type of information did the advocate provide to the member?

Part Two Process Steps:

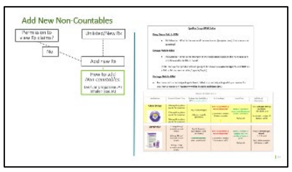
Pricing Non-Countables, and Diabetic Meters and Supplies

{TRAINER NOTE}

The maximum time limit for Part Two is 60 minutes.

Show the **Add New Non-Countables** slide

-Tell learners to locate the job aids in Mentor.



Uncountable prescriptions, such as creams, eye drops, eardrops, and inhalers do not fit the parameters on this form. Liquid and aerosol doses are by volume, not by count. To get appropriate estimates of amounts and frequencies, refer to the RTM pricing Job Aids (inhaler JA, and ear/eye drop JA)

The eye/ear drop job aid provides questions to ask members that will help you get the information needed to enter into the RTM fields including:

- Drug Name
- Dosage
- Package
- #Taken/# of Packages
- How often

Access the pricing inhalers job aid. Then, enter the information across the columns into the corresponding columns in RTM.

- In the inhaler job aid, the columns across the top align to the columns in RTM. In these columns, you may find red or green font.
    - The red font is questions you can ask the member to get needed information to calculate the price, and green font is information to help you calculate the price.
    - The Additional Information column provides how many puffs are in a specific inhaler, which you may need to determine how many inhalers a member uses each month.

Let's take a look at the job aids so you can become familiar with the content. Access and review the following:

- RxE RTM Inhaler Pricing JA
- RxE RTM Pricing Insulin JA
- RxE RTM Eye and Ear Drops Guide

Take a look at the questions you will need to ask the member.

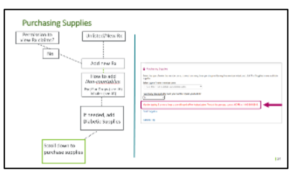
Show the **Diabetic Supplies Tab** slide

If you recall from Part One, the final step when adding a new prescription is to complete the Diabetic Supplies tab.

- If diabetic supplies are needed, and the member is required to test by their provider, ask the member what kind of meter they currently use.
    - If the member does not have a meter, follow the meter hierarchy and offer only one meter at a time for the member to see.
- If their current meter is their preference, offer to add it. Do not change to a different meter. You will only need to offer supplies.
- Next, open the Diabetic Supplies tab and complete the following information:
    - Select the Meter. RTM will indicate which meter(s) are preferred options for the member.
        - Click over the meter name to access additional information (talking points) that you can share with the member.

Show the **Purchasing Supplies** slide

If the member wants supplies, complete the Purchasing Supplies section. To do so:



- Select the type of supplies needed from dropdown menu.
- Then ask, *"How many times per day does your doctor require you to test?"*
    - This question **is not** about how many times the member tests, but how many times they have to do it per doctor's orders.
    - If the member gets tested six or more times, RTM will display a note informing a Prior Authorization (PA) is needed.
        - The note states: "Member testing six or more times a day will need a Prior Authorization. To start this process, contact HCPR at 1-800-555-2546."
    - If the member gets tested six or more times, you must continue the call. **Before ending the call,** transfer the member to get the PA started, per Mentor instructions.
    - You must provide the member with the number to the department they are going to be transferred. In this case, it will be the HCPR number for PA.
- Next, click Find Supplies. RTM will populate supplies that are specific to the meter selected.
- You can then select the supplies that are needed

- If diabetic supplies are not needed, do the following:
    - Click Calculate Price
    - **If you haven't done so**, read the pricing disclaimer located on the Prescriptions Tab
    - Click Add to Fax. RTM will display the total order cost and allow access to the View Order Summary Tab

NOTE:

- The shopping cart displays the total order cost as well as the total savings.
- If you click on the cart, a new window opens displaying detailed information about each prescription including the tier number.

{TRAINER NOTE} <<

Complete the practice scenarios outlined in the PowerPoint. Depending on the number of logins available there are a few ways you can approach the practice sessions:

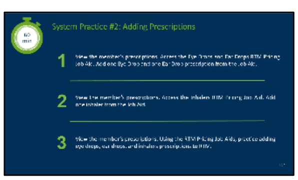
1. If there are enough logins for each participant, send them out to practice on their own. Remain available to answer questions.

2. If you only have a few logins available, you can divide the class into cohorts and send them out to breakout rooms with co-facilitators or SMEs. The co-facilitators or SMEs can allow participants to control their computer to practice.

3. You can allow participants to control your computer to practice. This option will take the longest because each participant would have to practice separately instead of concurrently.

Keep your chosen procedure in mind in all upcoming scenarios.

Show **System Practice #2: Adding Prescriptions** slides.

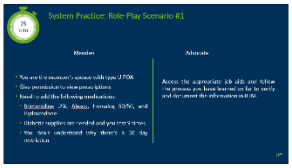


Take a moment to practice adding prescriptions into RTM on your own. If you need help, refer to the System Practice #2: Adding Prescriptions process checklist in the participant guide. You will also need to refer to the following job aids while you complete this activity:

- RxE RTM Inhaler Pricing JA
- RxE RTM Pricing Insulin JA
- RxE RTM Eye and Ear Drops Guide

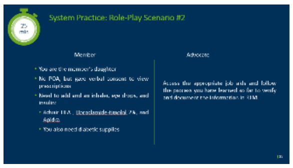
{TRAINER NOTE} <<

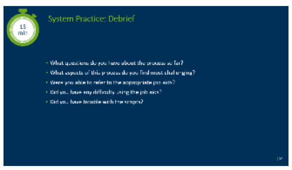
Show **System Practice: Role-Play Scenario** slides.
-Separate learners into pairs
-Tell learners that the information for this role play scenario is also listed in the System Practice: Role-Play Scenario of the participant guide.
-Allow learners to decide who will play the role of member, and who will play the role of advocate. Learners will have the opportunity to take turns playing each role.
-Instruct the advocate to access the RTM system and gather the appropriate information from the member to complete the process
-Instruct the advocate to follow the appropriate procedures, and read the required statements to the member



Now let's apply what you've learned so far. You will have the opportunity to work with a partner to practice a role-play scenario. Using RTM, take turns playing the role of the member and advocate. Gather the appropriate information from the member to complete the process.

Show **System Practice: Debrief** slides**.**





Now that you've had some time to practice adding prescriptions into RTM. Let's reflect on your experience.

- What questions do you have about the process so far?
- What aspects of this process do you find most challenging?
- Were you able to refer to the appropriate job aids?
- Did you have any difficulty using the job aids?
- Did you have any trouble with the scripts?

{TRAINER NOTE}

Complete the practice scenarios outlined in the PowerPoint. Depending on the number of logins available there are a few ways you can approach the practice sessions:

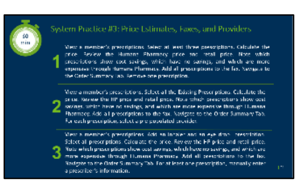
1. If there are enough logins for each participant, send them out to practice on their own. Remain available to answer questions.

2. If you only have a few logins available, you can divide the class into cohorts and send them out to breakout rooms with co-facilitators or SMEs. The co-facilitators or SMEs can allow participants to control their computer to practice.

3. You can allow participants to control your computer to practice. This option will take the longest because each participant would have to practice separately instead of concurrently.

Keep your chosen procedure in mind in all upcoming scenarios.

Show the **System Practice #3: Price Estimates, Faxes, and Providers I** slide.



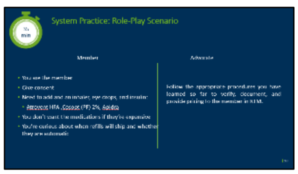
Take a moment to practice obtaining price estimates and adding prescriptions to fax to the provider. Complete each task on your own and follow the correct process in RTM. If you need help, use the System Practice #3: Price Estimates, Faxes, and Providers 1 process checklist in the participant guide. Refer to the following job aids while you complete this activity:

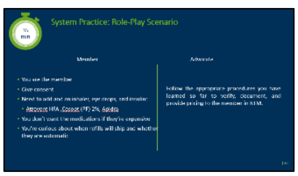
- RxE RTM Inhaler Pricing JA
- RxE RTM Pricing Insulin JA

- RxE RTM Eye and Ear Drops Guide

{TRAINER NOTE}

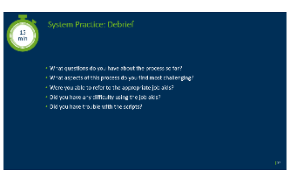
Show the **System Practice: Role-Play Scenario** slide.
-Separate learners into pairs
-Tell learners that the information for this role play scenario is also listed in the System Practice: Role-Play Scenario in the participant guide.
-Allow learners to decide who will play the role of member, and who will play the role of advocate. Learners will have the opportunity to take turns playing each role.
-Instruct the advocate to access the RTM system and gather the appropriate information from the member to complete the process
-Instruct the advocate to follow the appropriate procedures, and read the required statements to the member





Now let's apply what you've learned so far. You will have the opportunity to work with a partner to practice a few role-play scenarios. Using the RTM and job aids, take turns playing the role of member and advocate.

Show **System Practice: Debrief** slides.



Now that you've had some time to practice providing price estimates and adding prescriptions to fax to a provider, let's reflect on your experience.

- What questions do you have about the process so far?
- What aspects of this process do you find most challenging?
- Were you able to refer to the appropriate job aids?
- Did you have any difficulty using the job aids?
- Did you have any trouble with the scripts?

{TRAINER NOTE}

Complete the practice scenarios outlined in the PowerPoint. Depending on the number of logins available there are a few ways you can approach the practice sessions:

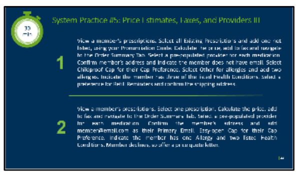
1. If there are enough logins for each participant, send them out to practice on their own. Remain available to answer questions.

2. If you only have a few logins available, you can divide the class into cohorts and send them out to breakout rooms with co-facilitators or SMEs. The co-facilitators or s SMEs can allow participants to control their computer to practice.

3. You can allow participants to control your computer to practice. This option will take the longest because each participant would have to practice separately instead of concurrently.

Keep your chosen procedure in mind in all upcoming scenarios.

Show **System Practice #4: Price Quotes, Faxes, and Providers II** slide.

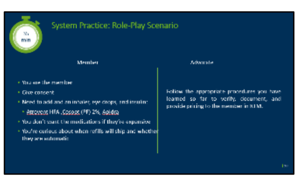


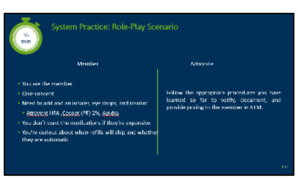
Take a moment to practice sending price quotes and saving the session. Complete the tasks on your own and refer to the System Practice #4: Price Quotes, Faxes, and Providers II process checklist in the participant guide. Use the job aids below as you complete the assignment.

- RxE RTM Inhaler Pricing JA
- For Concentrix BPO advocates only, refer to the Associate Jacksonville SharePoint website for allergy and health information.

{TRAINER NOTE}

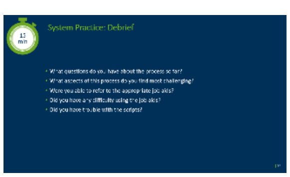
Show the **System Practice: Role-Play Scenario** slide.
-Separate learners into pairs
-Tell learners that the information for this role play scenario is also listed in their participant guide in the System Practice: Role-Play Scenario.
-Allow learners to decide who will play the role of member, and who will play the role of advocate. Learners will have the opportunity to take turns playing each role.
-Instruct the advocate to access the RTM system and gather the appropriate information from the member to complete the process
-Instruct the advocate to follow the appropriate procedures, and read the required statements to the member





Now let's apply what you've learned so far. You will have the opportunity to work with a partner to practice a few role-play scenarios. Using the RTM and job aids, take turns playing the role of member and advocate.

Show **System Practice: Debrief** slides.



Now that you've had some time to practice providing sending quotes and saving a session, let's reflect on your experience.

- What questions do you have about the process so far?
- What aspects of this process do you find most challenging?

- Were you able to refer to the appropriate job aids?
- Did you have any difficulty using the job aids?
- Did you have any trouble with the scripts?

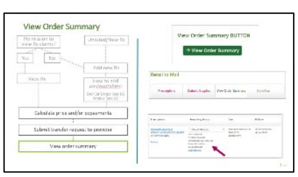
Part Three Process Steps:

- **Review prescriber information with the member (View Order Summary Tab)**
- **Review member information, cap preferences, health and allergies, communication preferences, shipping and payment information**
- **Obtaining final permission (absolute Yes)**

{TRAINER NOTE}

The maximum time limit for Part Three is 90 minutes.

Show the **View Order Summary** slide.



After all requirements have been met, View Order Summary will be enabled. Click View Order Summary Button on the lower right hand corner or click View Order Summary on the Tab.

The View Order Summary tab will allow you to:

- Select a Pre-populated provider by first and last name
- Update Phone, Address and/or Fax number
- Add a different Provider

You will need to review the prescriber information. Complete the following steps while on the call with the member

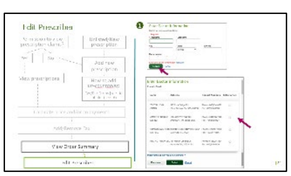
- To confirm the correct provider is listed and contacted, you must do the following for each medication listed:

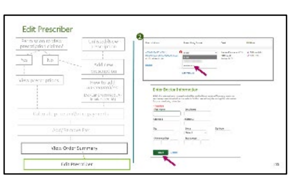
- Ask the member for the provider's first and last name for all items being requested or read name listed in RTM system.
- Ask the member for the provider phone number. If the member does not know the number, you can read what is listed and ask the member if the information is correct.
- Verify the provider address. Ask the member for the address they use for their doctor visits. If the member does not have the address, you can read what is listed and ask the member if the information is correct.
- Suggested Scripting: "Do you see the provider at 3333 W Baroda St in Any City, State 00000?"
- Do not frustrate the member if they do not have the provider address they go to, no address just eliminates using OMS to verify the provider address.

NOTE:

- The provider NPI is listed when there is a claim in RxNova Call Connect.
- Fax can be sent to a member's current provider(s), but fax cannot be sent to Emergency Room doctors or to a clinic name. (Ex.: Greenville Clinic)

Show the **Edit Prescriber** slide.





As you review the provider information with the member, you may need to edit the prescriber information. To do so:

- Review the prescriber information for each prescription.
- If prescriber information is not accurate, click Edit Phone/Fax option.
- Edit the provider name, phone and address as needed or per process
  - **Do not** update the fax number yet. This is done during After Call process.

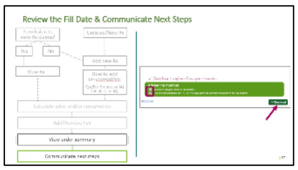
- There are two ways to add a new prescriber:
  - The first way to add a new prescriber is from the search function
    - You can search for the doctor by entering the First and Last name, selecting the state, and clicking Search. This will reveal a list of doctors to choose from.
  - The second way is by entering the information manually.
    - Select Add Doctor from the Prescribing Doctor drop-down menu
    - Add the new doctor's information by entering the first name, last name, selecting the state, and adding the phone number. Enter the phone number as the fax number until the fax number is verified. Then click Save.

NOTE:

- The Auto Refill option will only display if the mediation has auto refill available. You will learn more about auto-refills in a lesson later on.

Show the **Review the Fill Date & Communicate Next Steps** slide.

Once you've edited the prescriber information, you will need to review the Fill Date information with the member. To do so:



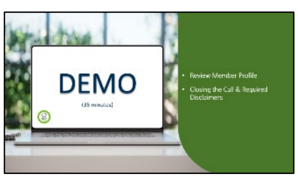
- Discuss the following Advise the Member items:
    - The member should inform their provider's office of the fax request
    - For new prescriptions the turnaround time (TAT) is 7-10 days after the provider responds to the fax request.
- Then click on Checkout.
- RTM will then gather information from OMS to see if the member has a pharmacy account already.

NOTE:

- If, after clicking Checkout, the member does not want to use our pharmacy, the member will still have a pharmacy account. The pharmacy account will be created once the checkout button is selected.

{TRAINER NOTE} <<

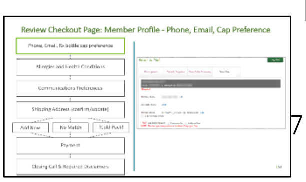
If the system is available, run a live demo. If the system is not available, use slides.



Topics to be demonstrated:

- Review checkout page member profile
    - Phone, email, prescription bottle cap preference
    - Allergies and health conditions
    - Communications preferences
    - Shipping address
    - Payment
- Closing the call and required disclaimers

Show **Review the Checkout Page: Member Profile Phone, Email, Cap Preference** slide.



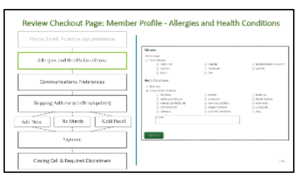
Before closing the call, you will need to verify, Add or Edit the members Phone Number and Email.

- An alternate phone number is not required and does not have to be asked for
- When a member provides a mobile number as primary number the advocate can use it.
- When the member states they do not have an email address, select the radio button next to "I do not have email".

NOTE:

- Try to obtain an email address. Let the member know that an email summary of the conversation and next steps with the pharmacy can be sent via email.
- The member might want to put a family/friend email who assist with their prescriptions. Read the "Include medication names in emails" statement.
- Verify the member's medicine cap preference. Previous preference will be listed.

Show the **Review the Checkout Page: Member Profile Allergies and Health Conditions** slide.



It's important to verify the member's allergies and health conditions, as they may impact medications.

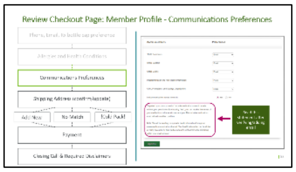
If updates are required, select Update after entering the allergy and health condition information.

Business Partner Organization (BPO) advocates can use the Associate Jacksonville SharePoint site to access the allergies and health condition list to assist in spelling.

Note:

- Allergies are not just medications.
- Allergies and Health Conditions options cannot be read to the member.
- Any previous marked or unmarked options **cannot** be read to the member.
- Ask the member to spell the allergy or health condition and use phonetics like A as in Alpha
- Do not use acronyms; spell out the allergies and health conditions (ex/MS-Multiple Sclerosis)
- Be Specific on allergies, instead of just antibiotic list the type such as Penicillin
- Do not include items that are not truly allergies or health conditions (ex/allergic to wife, work, etc.)

Show the **Review the Checkout Page: Member Profile Communications Preferences** slide.

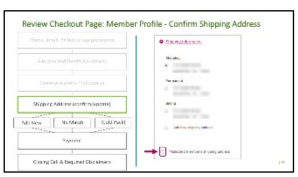


You will need to verify the member’s communication preferences for refill reminders.

- If the member provides an email, ask if they’d like to include the medication names in the email. If yes, read the following statement:
  - *To protect your privacy, we don't include medication names in emails without your permission. By choosing "Yes", you can receive the names of your medications in the emails we send you. This includes medications used to treat sensitive condition.*
    (Note): We will be sending your private health information through an unsecured communication channel. Your health information can be at risk of being accessed by third parties when it's sent and/or while remaining within your email account.

NOTE:

- Refill reminders are done by Phone or Email. **Do not** provide the option NONE.
- To save changes, select Update.
- DO NOT offer Text Messages

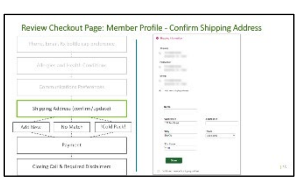


Show the **Review the Checkout Page: Member Profile Confirm Shipping Address** slide.

You will need to verify or update the member’s full shipping address including zip code.

NOTE:

- All the member’s known addresses will populate.
- When verifying the address make sure to include the word “Shipping” address.



Show the **Review the Checkout Page: Member Profile Shipping Address- Add New** slide.

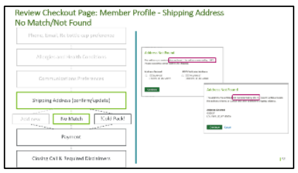
To add or update a shipping address, click Add new shipping address and fill out the appropriate fields. Then select Save.

- Required Fields: address, city, state, zip code
- Addresses added will populate into OMS and CRM as shipping address

NOTE:

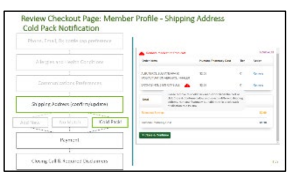
- Add a shipping change note for any new shipping addresses added in RTM.
- Also confirm the new address reflects in CRM.
- If needed, update the address type in CRM.
    - If the new address is a primary address change, then the address type needs to be permanent.
    - If the updated address is a shipping address change, then the type needs to be shipping.

Show the **Review the Checkout Page: Member Profile Shipping Address- No Match/Not Found** slide.



This is a message you will receive when a newly entered address in RTM does not match what is returned by the United State Postal Service (USPS). Confirm the member's correct address. Then select either the pre-populated address from RTM, or the USPS validated address. When finished, select Continue.

Show the **Review the Checkout Page: Member Profile: Shipping Address - Cold Pack Notification** slide.

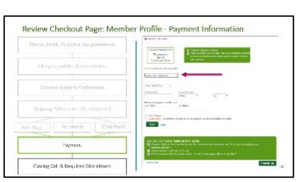


You'll receive this message when a validated address is a PO Box address, and one of the requested items included a cold pack medication that needs to be sent via UPS.

NOTE:

- Remove the item if the member does not have a street address.
- If the member has a street address, select Close and Continue. Then add or select the street address.
- All items requested will ship, this one time, to the street address.

Show the **Review the Checkout Page: Member Profile: Payment Information** slide.



Follow these steps to cover the payment information with the member:

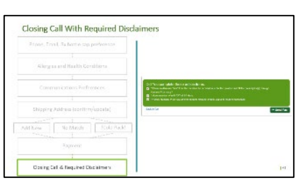
- First, select Add a new credit card

- Then, provide the member with the acquired account limit information and select the radio button next to it.
    - The account limit for Medicare and pre-effective is $100.
    - Account limit is the total of the balance on the account plus the copayment on an order.
- Select the credit card from the dropdown menu. If the member has a card on file the information will display; this card will not automatically be on the requested medication order unless it is on auto charge.
    - If the member does not have a card on file, you **must offer** to add a credit or debit card for members with a $0 copayment, but tell members that they are **not required** to add one.
    - The auto charge option is only available when adding a new card, **not** for existing cards. If selected, auto charge will populate in OMS and CRM.
- Then, read the following statement verbatim: "*The credit/debit card will not be charged until the prescriptions are filled".*
- Lastly, click the Save button.

NOTE:

- Always refer to the credit limit as the **account limit.**
- Check CRM to determine if the credit/debit card that was entered in RTM, populated with an auto charge
- Auto Charge is used on new credit/debit cards that are added in RTM. The auto charge helps prevent delays and process the request faster.
- A member never has to place a debit/credit card to their account. This is an option for convenience.

Show the **Closing Call with Required Disclaimers** slide.



Once you have provided estimates and have proceeded through RTM close the call and read the required disclaimers. To do so:

- First, review and check the "Did you complete these action items:" box.
- Place a checkmark next to the statements you completed.

- Obtain an absolute yes from the member for permission to fax the provider and fill the prescription(s) through our pharmacy. If necessary, obtain the prescriptions from the local pharmacy.
- Inform member of refill TAT of 5-7 days.
- Provide our pharmacy customer service phone number, website, mobile app, and hours of operation.

- Ask the member if they have any additional questions.
- End the call and begin the after call work.
- Lastly, make sure you **DO NOT** click the Send Fax button.
    - If you click Send Fax, RTM will display a question to ensure you validated the prescriber information.
    - If you click no, RTM takes you to the View Order Summary Page.

NOTE:

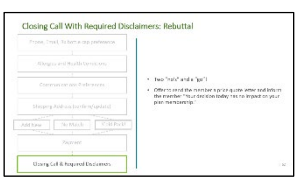
- An absolute YES is required to have permission to fax, fill requested medication/diabetic supplies with our pharmacy and, if necessary, to obtain prescriptions from their local pharmacy.
    - The absolute Yes question has to contain all three parts: fax; fill with HP, and obtain prescriptions from local pharmacy if needed.
    - It is important to have each advocate practice that question in any verbiage they like.
    - RTM does not include the “if necessary to obtain from the local pharmacy.”

{TRAINER NOTE}

Show the **Closing Call With Required Disclaimers: Rebuttal** slide.

-Inform learners of the job aids that are available:

- RxE Rebuttals to Member Objections



If the member changes their mind on using our pharmacy, attempt to overcome the objection with a rebuttal.

If the member still does not want to use our pharmacy, do not attempt additional rebuttals.

- Follow the saying “Two No’s and a go”. Refer to the RxEducation Rebuttals to Member Objections mentor document. For example, if the member says no, you will need to provide a rebuttal. If the member says no for the second time, you can move on in the process.

- Offer to send the member a price quote letter and inform the member “Your decision today has no impact on your plan membership.”

- Document the call in CRM and select the correct Classification and Intents.

- Documentation needs to include any estimated copayments provided to the member.

{TRAINER NOTE} <<

Show **Call Listening: Call Closing** slide**.**
-Use the call file RxE RTM Systems Based Actions- Call Closing. The call file is embedded on this slide, and is also available in the Learning Community.
-Hover over the talking icon on this slide to play the call.
-Learners refer to Call Listening: Call Closing in the participant guide

Now that you have an idea of what the process looks like to close the call. Let's listen to part of a call to hear how the advocate closed the call.

- What information did the advocate verify with the member?
- What questions did the advocate ask?
- What type of information did the advocate provide to the member?

{TRAINER NOTE} <<

Complete the practice scenarios outlined in the PowerPoint. Depending on the number of logins available there are a few ways you can approach the practice sessions:

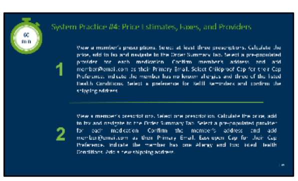
1. If there are enough logins for each participant, send them out to practice on their own. Remain available to answer questions.

2. If you only have a few logins available, you can divide the class into cohorts and send them out to breakout rooms with co-facilitators or SMEs. The co-facilitators or s SMEs can allow participants to control their computer to practice.

3. You can allow participants to control your computer to practice. This option will take the longest because each participant would have to practice separately instead of concurrently.

Keep your chosen procedure in mind in all upcoming scenarios.

Show **System Practice #5: Price Estimates, Faxes, and Providers II** slide**.**

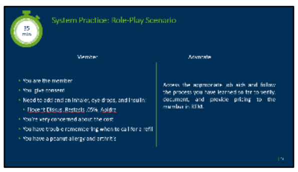


Now let's practice verifying the member's profile and closing the call. Complete each task on your own and refer to the System Practice #5: Price Estimates, Faxes, and Providers II process checklist in the participant guide if you need help. Refer to the following job aids while you complete this activity:

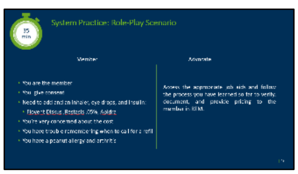
- RxE RTM Inhaler Pricing JA
- RxE RTM Pricing Insulin JA
- RxE RTM Eye and Ear Drops Guide
- For BPO advocates only, refer to the Associate Jacksonville SharePoint website for allergy and health information.

{TRAINER NOTE}

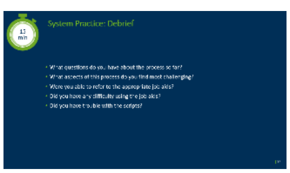
Show the **System Practice: Role-Play Scenario** slide.
-Separate learners into pairs
-Tell learners that the information for this role play scenario is also listed in their participant guide in System Practice: Role-Play Scenario.
-Allow learners to decide who will play the role of member, and who will play the role of advocate. Learners will have the opportunity to take turns playing each role.
-Instruct the advocate to access the RTM system and gather the appropriate information from the member to complete the process
-Instruct the advocate to follow the appropriate procedures, and read the required statements to the member



Now let's apply what you've learned so far. You will have the opportunity to work with a partner to practice a few role-play scenarios. Using the RTM and job aids, take turns playing the role of member and advocate.



Show **System Practice: Debrief** slides**.**



Now that you've had some time to practice providing price estimates and adding prescriptions to fax to a provider, let's reflect on your experience.

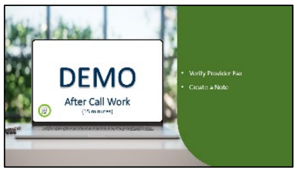
- What questions do you have about the process so far?
- What aspects of this process do you find most challenging?
- Were you able to refer to the appropriate job aids?
- Did you have any difficulty using the job aids?
- Did you have any trouble with the scripts?

Part Four Process Steps:

- **Provider verification process (including OMS, NPPES/NPI)**

- **Sending the Fax**
- **Creating a Note**

{TRAINER NOTE} <<



The maximum time limit for Part Four is 90 minutes.

If the system is available, run a live demo. If the system is not available, use slides.

Topics to be demonstrated:
- Provider Verification
- Sending the Fax
- Create a Note

{TRAINER NOTE} <<

Show the **Provider Verification** slide.

Demonstrate in OMS and NPPES/NPI how to verify the fax number

After ending the call with the member, you will need to complete a few additional steps in RTM. You can refer to the following job aids in Mentor:

- RxE Verify Fax Number Hierarchy JA
- RxE Verify Fax Number in OMS JA

Follow these steps to verify the provider:

- First, access the View Order Summary tab to locate the provider fax number.
- Then, open OMS and select the physician tab.
- Select Physician National Provider ID (NPI) from the dropdown menu. This will open a text entry field for the NPI number. If there is no NPI number, you can conduct a search in OMS by the member's first and last name.
- Copy the NPI number from the View Order summary tab and paste it in text entry field for the NPI number.
- Next, click Find. The physician information will auto-populate.
- Select the physician name to open it.
- Look for the Notes section, and identify the latest verified fax note within the last 12 months.
- Select the verified fax note

- You can use the fax number listed if:
  - The fax is verified by-
    - DCTECH FAIL FAX
    - DCFAILEDFAX
    - MYBTECH, or
    - MPI
    - RxEVerify
  - The fax was verified within the last 12 months.
  - The address in the note matches the address of the member's doctor's office

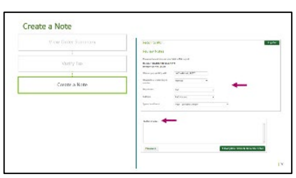
If the member did not know the address, or the fax number did not meet the criteria (i.e the note type is not within 12 months and the address the member provided does not match what is in OMS), follow these steps instead:

- First, access NPPES/NPI, or verify the fax in the Fax Hierarchy.
- Then, copy the NPI number and paste it in NPPES/NPI.
- Check to see if there is a fax number in NPPES/NPI.
    - If there is no fax number in NPPES/NPI, you must call the doctor's office to obtain one. When calling the office, state:
        - Your name and the pharmacy you are calling from. Mention that the line is being recorded.
        - Ask for the prescription fax number
        - The doctor's full name
        - Voice recordings that include the fax number can be used, only if the doctor's first and last name is included in the recording.
          Suggested scripting:
          Hi, my name is (advocate first name) calling from (Pharmacy name) on a recorded line. I would like the prescription fax number for (doctor full name), please.
- Next, update the provider fax number (if needed)
- Then click Send Fax
    - RTM will display a question to ensure you validated the prescriber information.
- Click Yes to send the fax.
    - RTM will display the Success Message.
    - The message states: *"Order was successfully submitted. Do not re-submit."*
- Lastly, click OK.
    - RTM will display the summary page

{TRAINER NOTE}

Show the **Create a Note** slide.

-Demonstrate this process in RTM.



After you successfully send the fax, RTM will display the Create a Note page. You will see the following information:

- Confirmation # (displays - which is the CRM case)
- Account #
- Member information
- Cap preferences
- Prescriptions
- Total cost and savings in the fax shopping cart
- Shipping information

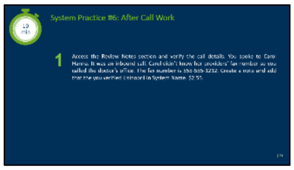
You will then have the opportunity to create a note. To do so, follow this process:

- First, you will need to populate a note by clicking Review Notes
- The Review Notes page displays and you will see the following information:
    - Who are you speaking with?
    - What is their relationship to the member?
    - Department

    - Call Type
- Next, select the Type of Enrollment option from the drop-down menu.
    - The enrollment options are:
        - Member Not Interested - Provided Price Quotes;
        - Member Not Interested - Other;
        - Pitch - Enrolled Member;
            - This option is for Outbound calls. This is not typical for RxE Advocates.
        - Verify - Completed Enrollment;
            - This option is used by the verification group (Tempe, AZ), or the backup BPO Verification team
        - Inbound Call-Enrolled member. This selection is used for Inbound and Welltok verification calls where an RTM fax was sent.
- Then, under the Maintenance section, select the Fax Verification option from the drop-down menu.
    - You'll see the following options:
        - Called Doctor's Office
        - NPPES/NPI Doctor Office Closed
        - Could not Verify (NOTE: **Do not** use this option)
        - Not Applicable/Pitch
        - Other
            - If the RxE advocate used OMS, the option to select will be Other,
            - Then type OMS in the free-text box that appears underneath Other.
- Next, enter Additional Notes.
    - For example: A transfer, etc.
    - Enter the RxNova Call Connect or ANOC Pricing using RxCalculator notes in this section with the actual pricing.
- Then, click Complete Order & Generate Notes.
    - RTM will display the success note which states the submission was successful.
    - The RTM automated note populated to the CRM case number.
- Lastly, click OK
    - OMS and CRM will display the Summary Page including the Generated Notes that are located at the bottom of the page underneath the shipping address.

NOTE:

- The note is sent to OMS and back to CRM.
- The note includes RTM numbers which represent the ID for each fax sent.
- Each fax can hold a maximum of three medications, so if the member had five medications, only three medications were sent on one fax, and the other two medications are sent on another fax.



Show **System Practice #6: After Call Work** slide**.**

Now let's practice completing the after call work. Complete each task on your own and refer to the System Practice #6: After Call Work process checklist in the participant guide, as well as the Dr. Rosalind Verifying Fax Number Hierarchy job aid for guidance.

Show the **Q&A** slide.

Before we wrap up this lesson, do you have any lingering questions about how to use RTM to transfer member prescriptions to our mail-delivery pharmacy?