# Compass - Locating a CIF Using Auto Search

[Process](#_Toc207167496)

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**Description:** How to locate a Client Information Form (CIF) in theSource using the Auto Search feature in Compass.

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| Process |

**Note:** The user must be logged into theSource for the Auto Search feature in Compass to work.

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| **Step** | **Action** | |
| **1** | From the Member Snapshot Landing Page or the Claims Landing Page, navigate to the **Client and Processing Information** panel, then click the **Carrier number** hyperlink.    **Result:** Compass automatically performs a search for the **CIF** in theSource. | |
| **2** | Proceed depending on if a 1-to-1 CIF match is identified. | |
| **If…** | **Then…** |
| Yes | A new Internet browser tab opens and displays the specific **CIF** information in theSource. |
| No | A new Internet browser tab opens and displays a list of **CIF** **Search Results** in theSourcefrom which to choose.   * From the Search Results, click the **CIF** hyperlink to view the desired CIF information in theSource.     **Note:** Although multiple matches display in the **Search Results**, this method is more precise than when searching with the client code using the **Search** bar in **theSource**. |
| **3** | Close all **theSource** Internet browser tabs which are no longer needed once the case is closed. | |

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| Related Documents |

**Parent Document:** [CALL-0049 Customer Care Internal and External Call Handling](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0049)

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

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