# Compass MED D - Deceased Beneficiary

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**Description:** This document outlines the process to follow when receiving a call regarding a deceased beneficiary.

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| General Information |

A Power of Attorney (POA) will expire and no longer be valid once the beneficiary is deceased. To handle issues, CVS Caremark must receive one of the following (copies are acceptable):

* Letters of Testamentary
* Executor of Estate
* Death Certificate and affidavit stating no one else is in line for their estate

**Address (Except for BlueMedicareRx (NEJE):**

<PBM Name>

Customer Care

PO Box 6590

Lee’s Summit, MO 64064-6590

**Blue Medicare Rx (NEJE) Mailing Address:**

Blue MedicareRx

PO Box 30001

Pittsburgh, PA 15222-0330

Blue MedicareRx Fax Number: 1-866-342-7048

**Note:** If there is a dispute regarding the beneficiary’s death refer to:

* [MED D - Specialized Member Services Team (SMST) - Mistaken Disenrollment of a Beneficiary](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=dee963eb-9ad5-453e-838a-2a26b97ffd7e)
* [MED D - Blue MedicareRx (NEJE) - Mistaken Disenrollment of a Beneficiary](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=27411101-dd06-4169-b763-71f92ad44bc6)

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| Process |

Perform the following steps:

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| **Step** | **Action** | | | | | |
| **1** | Express condolences to the caller.  **Example:**  I am very sorry for your loss, and I am here to help. | | | | | |
| **2** | Document the caller’s name, who is calling, and the caller’s relationship to the beneficiary. | | | | | |
| **3** | From the Compass Medicare D Landing Page, determine the Enrollment status by reviewing the **Disenrollment Reason** field.  Refer to:   * [Compass MED D - Disenrollment Transfer Procedures](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=df4e7caf-c6fe-4bc8-9b5d-85a605f92cf8) * [MED D - Specialized Member Services Team (SMST) - PeopleSafe Disenrollment Reason - Processes and References](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=7d74f25f-180c-4821-a912-b3525da5f778) * [MED D - Blue MedicareRx (NEJE) - PeopleSafe Disenrollment Reason - Processes and References](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=111497fe-67a8-4a8d-9976-0a0803a90976) | | | | | |
| **If…** | | | **Then…** | | |
| Blank | | | 1. Add a temporary **Mail Order Alert** under the member’s profile in **Compass** with the following information:    1. Caller’s name that provided the notification of death & their relationship to the member.    2. The deceased date.    3. Place all future orders on hold until the line of eligibility can be closed.   Refer to [Compass MED D - Medicare D Alerts](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7f5d83d4-94b0-4a59-9b40-3e9ce8b08b62) for the process of adding Medicare D Alerts in Compass.   1. Confirm enrollment status in MARx as the beneficiary is still showing as active in Compass.    1. Refer to [Compass MED D - Verifying Enrollment, Eligibility, and LIS in MARx](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=97073956-89ea-45dc-be12-d8b49af47bab). | | |
| **If Date of Death is…** | | **Then…** |
| Blank | | * Beneficiary is active. Advise the caller that Social Security Administration (SSA) will need to be contacted.   + Refer to [MED D – Approved Referral Guidelines to Medicare and Social Security](file:///C:\Users\C337799\AppData\Local\Microsoft\Windows\INetCache\Content.Outlook\U1QX4D53\CMS-2-026165).   **Note:** The funeral home may handle contacting Social Security.   * Proceed to the next step. |
| Populated | | * Advise the caller that Social Security Administration (SSA) will need to be contacted.   + Refer to [MED D – Approved Referral Guidelines to Medicare and Social Security](file:///C:\Users\C337799\AppData\Local\Microsoft\Windows\INetCache\Content.Outlook\U1QX4D53\CMS-2-026165).   **Note:** The funeral home may handle contacting Social Security.  **CCR Process Note:** Contact your supervisor to create an IT Service Center Ticket as there may be a communication issue between MARx and Compass.   * Proceed to the next step. |
| MEMB DECEASED | | | Do you know if Social Security Administration has been advised that the beneficiary is deceased? | | |
| **If...** | | **Then...** |
| Yes | | Proceed to the next step. |
| No | | * Advise the caller that Social Security Administration (SSA) will need to be contacted.   + Refer to [MED D - Approved Referral Guidelines to Medicare and Social Security](file:///C:\Users\C337799\AppData\Local\Microsoft\Windows\INetCache\Content.Outlook\U1QX4D53\CMS-2-026165).   **Note:** The funeral home may handle contacting Social Security.   * Proceed to the next step. |
| **4** | * Once Social Security Administration processes this information, Medicare will disenroll the beneficiary from their Prescription Drug Plan. * The Plan will send a letter confirming the beneficiary’s disenrollment. * If there is any balance on the beneficiary’s account, the beneficiary’s estate will receive a letter. | | | | | |
| **5** | Did you receive any orders after the beneficary’s passing that you need to return? | | | | | |
| **If...** | | **Then...** | | | |
| Yes | | Refer to [Compass MED D - Return Order for Refund - Copay Credit - CCR & Senior Process](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=dc105707-608c-4fe5-a6f0-bfc9b4fc20ad).  Proceed to the next step. | | | |
| No | | Proceed to the next step. | | | |
| **6** | Is the benificiary opted-in to the Medicare Prescription Payment Plan?  Refer to [Compass MED D - View Medicare Prescription Payment Plan Tab](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1499eb51-644e-43c0-8889-8b6e05759669). | | | | | |
| **If…** | **Then…** | | | | |
| Yes | **For Health Plan only:** Advise the caller to contact their health plan to make them aware.  Proceed to the next step. | | | | |
| No | Proceed to the next step. | | | | |
| **7** | Do you need to request any of the following:   * Statement of Cost * Mail Services Account Balances or Credits * Reissue Check for Deceased Payee * Paper Claims * Premium Refund | | | | | |
| **If...** | | | | **Then...** | |
| * Statement of Cost * Mail Services Account Balances or Credits * Reissue Check for Deceased Payee | | | | Refer to [Compass - Mail Order Calls Regarding Deceased Members](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=84208228-6cf3-46fd-ae5a-14624e9f04c0).  Proceed to the next step. | |
| Paper Claims | | | | Refer to [Compass MED D - Researching and Submitting Paper Claims](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=59458286-c3a2-4924-9f92-7a55cb5defb9).  Proceed to the next step. | |
| Premium Refund | | | | Refer to “Death of A Beneficiary” section in the appropriate document listed below:   * [MED D - Blue MedicareRx (NEJE) - Premium Billing General Information, Processes, & Document Index](file:///C:\Users\C337799\AppData\Local\Microsoft\Windows\INetCache\Content.Outlook\U1QX4D53\CMS-PCP1-024894) * [Aetna Compass MED D - SilverScript - Premium Billing General Information, Processes, & Document Index](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b4765dd1-d9b7-4dbe-afd6-0e4f6b509082) | |
| No additional requests | | | | Proceed to the next step. | |
| **8** | Close the call according to normal processes.  **CCR Note: For Health Plan clients**: Transfer the caller to the client at the Enrollment line provided in the CIF to advise them the beneficiary is deceased. | | | | | |

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| Related Documents |

Refer to the “Grievance Standard Verbiage (for use in Discussion with Beneficiary)” section in [Compass MED D - Grievances Index](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=70034f51-77df-49a4-ae97-7d3d63b216b3).

**Parent SOP:** CALL-0048: [Medicare Part D Customer Care Call Center Requirements-CVS Caremark Part D Services, L.L.C.](https://policy.corp.cvscaremark.com/pnp/faces/SecureDocRenderer?documentId=CALL-0048&uid=pnpdev1)

**Abbreviations/Definitions:** [Abbreviations / Definitions](file:///C:\Users\C337799\AppData\Local\Microsoft\Windows\INetCache\Content.Outlook\U1QX4D53\CMS-2-017428)

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