**Compass MED D - Medicare D System Member Search and Guided Authentication (Member in FACETs, Not RxClaim)**

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**Description:**  These MED D guided caller authentication steps should be used when a member account is located using the Medicare D System search parameters in Compass.

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| General Information |

Once Authentication is complete, functionality will be limited to the **Case Details Landing Page** and the **Medicare D Landing Page**. The Member Snapshot and Claims Landing Pages will not display.



To protect the privacy of a plan member’s information, the identity of the caller must be authenticated; however, general benefit questions **that do not pertain to a specific beneficiary** can be answered without authenticating the call.



Respond with a positive statement of acknowledgement, when appropriate.  
  
Sometimes the caller will ask a question before authentication is complete. Respond positively and acknowledge that you can resolve their concern today, then return to complete authentication. Demonstrate caring and empathy.

**Examples:**

* Yes, I can help.
* Yes, I would be happy to assist.

Use a positive transitional statement to continue authentication of the call.

* To better do that please provide me…
* To further assist, please provide me with…

**Pharmacy Requesting Member ID:**

Do **not** release the Member ID to the pharmacy until the account has been accessed. Refer to [Compass - Pharmacy Requesting Member ID (060419)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=fbcb5b8b-3e1e-40d9-8b05-33e034b54bf8).

**What is Guided Authentication?**

Guided Authentication helps ensure each call is authenticated per policy and procedures. As the agent proceeds through the call flow, the system presents the next set of steps and/or questions, prompting the agent to gather and enter information about the call into the system.

**Notes:**

* Call types and authentication requirements are dynamic and embedded into Compass.
* Call Flow Scripts are meant to guide the authentication flow and do not need to be read verbatim.
* Information gathered during the call is auto populated in the Case Notes.
* Calls that come through Compass CTI will automatically open as an **Interaction Case**.

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| Guided Authentication Process not CTI Authenticated |

Ensure the Caller Information screen is completely filled out; in most cases you should not navigate away from this screen to search for the member. Once the Caller Information is submitted, if the account is CTI fully authenticated, you will automatically enter the account. If the account is not fully authenticated, the Member Search screen will display.



Follow the steps below using the Medicare D search parameters when the call has **not** been CTI Authenticated:

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| **Step** | **Action** | |
| **1** | Determine the reason for the call, then select the appropriate option in the **Is this call an Internal Transfer?** field.    **ONLY** select **Cancel Authentication** to return to the **Search by Member** screen. This should only be done if one of the listed scenarios are met. Refer to [Scenario Guide - Cancel Authentication](#_Scenario_Guide_-_2) for additional information.  **Note:** Depending on the call, client specific scripting may display. | |
| **If…** | **Then…** |
| Not an internal transfer | * Select **No**. * Proceed to **Step 2**. |
| An internal transfer | * Select **Yes**. * Complete the additional fields. Refer to the [Scenario Guide - Warm Transfer](#_Scenario_Guide_-) as needed. * Proceed to **Step 2**. |
| **2** | Complete the required **Caller Information** fields.  PHD agents refer to [Related Screenshots](#_Related_Screenshots_1) for visual examples. | |
| **If**… | **Then**… |
| Call comes through non-CTI authenticated | Complete all required fields and select the correct option from the **Who is calling** drop-down menu, and then click **Next** to proceed. Proceed to **Step 3**.   * Depending on the caller’s relationship to the member (determined by the IVR or selected in the **Who is calling** field), different procedural verification fields may appear. Refer to the [Scenario Guide - Who Is Calling?](#_Scenario_Guide_-_1) for additional information. |
| Call comes through fully CTI authenticated | Proceed to **Step 8** |
| **3** | Perform a search using any of the following criteria: **Refer to Compass-Member Search (050037)**   * Member ID * First & Last Name * First & Last Name and Date of Birth (DOB) * Zip Code and Last Name * MBI * Carrier Code and First & Last Name, or Member ID * Carrier Code (by Client Name Search) | |
| **4** | Determine the following | |
| **If…** | **Then…** |
| Eligibility is found | **Result:** Authentication Information Screen will appear.  Continue with Authentication. Refer to [Compass-Guided Caller Authentication (050163)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=80476f74-7dca-4548-bf35-185ca8d45c13). |
| Eligibility is **not** found | **DO NOT TELL THE BENEFICIARY THEY ARE NOT ELIGIBLE!**  Proceed to **Step 5**. |
| **5** | Click on **Search by Medicare D**    **Result:** The **Search by Medicare D** screen displays. | |
| **6** | Enter the beneficiary information. Refer to the “Search by Medicare D” section within [Compass - Member Search (050037)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44e71d7a-1b1c-4931-9089-d4161a72d114) as needed.  **Search** for member account using any of the following parameters:   * Member ID * First & Last Name * Phone Number * MBI (**Note:** MBI is only used for Medicare members. MBI number can be found on their Medicare ID card.)   **Note:** If no information is entered within any of the search parameter fields, or if fields are populated incorrectly, an error message will appear below the field.  **Examples:**              If an error message is received, make necessary changes. | |
| **7** | Follow the table below. | |
| **If**… | **Then**… |
| Only one result is found. | Medicare D Authentication Screen will display.    Proceed to **Step 8**.  **ONLY** select **Cancel Authentication** to return to the **Search by Member** screen. This should only be done if one of the listed scenarios are met. Refer to [Scenario Guide - Cancel Authentication](#_Scenario_Guide_-_2) for additional information. |
| Multiple results are found | Click the appropriate M**ember ID** number in the Search Results section.    **Result:** The **Medicare D Authentication Screen** displays.    Proceed to **Step 8**.  **Notes:**   * Each column can be sorted. * The results can be filtered to display accounts that are **Active**, **Inactive**, or **Both**. * When more than 60 results are available, the first 60 members display with the following warning message at the top: “Search exceeded maximum results. Refine search criteria.” |
| No results are found. | **No members found** screen will display    Refer to [Compass MED D - SilverScript - Resolution of Eligibility (063009)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3498d644-ecdb-4bb5-8b04-fe1a1fbd7ee5).  **Notes:**   * The results can be filtered to display accounts that are **Inactive**. |
| **8** | Review active **Client Alerts**. This section is collapsible.    Confirm the member on the **Medicare D** **Authentication Information** screenis the member in question.   * If **yes**, proceed to the next step. * If **no**, click **Cancel Authentication** to return to the **Search by Member** screen. Refer to [Scenario Guide - Cancel Authentication](#_Scenario_Guide_-_2) for additional information. | |
| **9** | Ask the caller for the requested number of authenticators, then check the corresponding checkboxes on the **Medicare D** **Authentication Information** screen.    **Result:** A green Authentication complete! Confirmation banner displays below the Categories only when the required number of authentication tokens have been selected.   * Click **Continue** and proceed to **Step 10**   **Notes:**   * Only one authenticator from each Category needs to be selected. * Trouble Authenticating? refer to the [Scenario Guide - Trouble Authenticating?](#_Scenario_Guide_-–) section for further information. * MBI is only used for Medicare members; if no MBI is available, the box will not be active. (All Medicare members have been assigned an MBI which can be found on their Medicare ID card.) * The Member’s Zip Code defaults to the zip code for the active mailing address on file.   Do **not** release the Member ID to the pharmacy until the account has been accessed. Refer to [Compass - Pharmacy Requesting Member ID (060419)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=fbcb5b8b-3e1e-40d9-8b05-33e034b54bf8).  For more information regarding **Authentication complete!** for certain **Who is calling** selections, refer to the [Scenario Guide - Who Is Calling?](#_Scenario_Guide_-_1) section. | |
| **10** | The **Primary Interaction Reason** displays   * + - 1. Confirm the reason for the call (What can I help you with today?)       2. Choose the applicable reason from the **Primary Interaction Reason** drop-down menu.   **Note:**  Do **not** select “Other” in BOTH the Primary Interaction Reason field and Primary Interaction Reason Detail fields   * + - 1. Choose the applicable selection from the **Primary** **Interaction Reason Detail** drop-down menu.   d. Select **Yes** or **No** to indicate if the caller has called about the topic previously.   * + - * 1. Once all required fields are completed, click **Continue** to access the account.   **Note:** The **Close Case** buttonwill bring the agent to the **Close Case** tab.    For a full list of primary interaction reasons, refer to [Primary Interaction Reason (064447).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b9a50365-4c4b-4157-8c7b-00f8e1e6b6f3)  Once Authentication is complete you will be able to see the **Case Details Landing Page** and the **Medicare D Landing Page**. The Member Snapshot and Claims Landing Pages will not display.  **Example:**    Once you have gained access to the account, review the **Medicare D** **Member Details** panel (located on the Medicare D tab) for **Additional Agent Information** that you **may not release** to the caller, based on the caller type you selected during authentication. Refer to [HIPAA Grid (028920).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce)  **Example:** If “Broker/Agent” is selected during authentication as **Who is Calling?** the Broker/Agent has the following specified information under the **Additional Agent Information** dropdown. | |
| **11** | Proceed with answering the beneficiary’s questions.  Transfer to Med D SRT to ensure resolution of eligibility occurs. Refer to [Compass MED D - When to Transfer Calls to the Senior Team](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7). | |

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| Scenario Guide - Internal Transfer |

Refer to the following scenario as needed:

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| **Scenario** | **Action** |
| Receiving an internal transfer **Note:** Callers from an external organization (not CVS and/or Aetna) are **not** internal transfers. | * **Was the call authenticated prior to the transfer?** Select **Yes** or **No** * If yes, complete remaining applicable fields and then refer to [Step 8](#Step8_Guided_Authentication_Process_CTI). * If no, complete remaining applicable fields and then refer to [Step 2](#GAPStep4). * **Referring Case Number:** Obtain Referring case number from transferring agent. * **Import Case Info:** Click After obtaining Referring case number * **Name of Transferring Agent:** Enter information in this field * **Title/Department of Transferring Agent:** If the title is known, enter information in this field * **Caller Name:**  Enter Information in this field * **Who is Calling?:** Enter Information in this field * If the **Who is Calling** field is set to “Retail Pharmacy”, the **Pharmacy NPI/NCPDP** field will be populated with information captured by the IVR or entered by the transferring agent. |

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| Scenario Guide - Who Is Calling? |

Refer to the following scenarios as needed:

* [If Retail Pharmacy or](#_Toc147745021) [Long Term Care facility is selected for **Who is calling** and the Pharmacy Entered in IVR is incorrect](#_Toc147745022)
* [If Retail Pharmacy or](#_Toc147745023) [Long Term Care facility is selected for **Who is calling** and the system did not fully authenticate the pharmacy from the IVR](#_Toc147745024)
* [If “Other” is selected for **Who is calling**](#_Toc147745026)
* [Complete the additional fields that appear below the **Authentication complete!** confirmation banner for certain **Who is calling** selections](#_Toc147745027)

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| **Scenario** | **Action** | |
| Retail Pharmacy or  Long Term Care facility is selected for **Who is calling** and the Pharmacy Entered in IVR is incorrect. | The **Pharmacy Information** screen displays with information auto-populated by the IVR, if available.   * Confirm the caller is calling from the pharmacy displayed on the screen.      * If the pharmacy is incorrect, click **Pharmacy Search.**   **Result:** The Find a Pharmacy popup displays.     1. Enter pharmacy search criteria and click **Find.**   **Result:** Available pharmacies display in **Pharmacy Search Results**.   1. Select the appropriate pharmacy that is calling.   **Result:** The Search by Member screen displays. Refer to [Step 3](#GAPStep2). | |
| Retail Pharmacy or  Long Term Care facility is selected for **Who is calling**  and the system did not fully authenticate the pharmacy in the IVR | Obtain the pharmacy’s NPI/NCPDP from the caller and enter in the required field, then click **Next.**    **Result:** Search by Member screen displays. Refer to [Step 3](#GAPStep2). | |
| If “Other” is selected for **Who is calling** | 1. Verify that the appropriate selection is not available in the **Who is calling?** drop-down menu before selecting “Other.” 2. Input details about the relationship in the **Other Relationship** field that displays.      1. Click **Next**.   **Result:** The Search by Member screen displays. Return to [Step 3](#GAPStep2). | |
| Complete the additional fields that appear below the **Authentication complete!** confirmation banner for certain **Who is calling** selections. | If the caller is a third party calling on behalf of an adult member, ask the following question when prompted and select “Yes” or “No” depending on their answer:  Is the member aware that you are calling on their behalf?   Select **Yes** under **Caller’s Response** for the following **Who is calling** selections, as they **DO NOT** require the Third-Party question listed (check the CIF for any exceptions):   * Brokers Office - MED D (Broker/Agent) (refer to [Universal Care - Caller Authentication (004568)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bcb8da72-5501-4631-b9fd-fe675bc4a1fd) as needed) * Other - Client and Plan Representatives (Account Manager) (refer to [Universal Care - Caller Authentication (004568)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bcb8da72-5501-4631-b9fd-fe675bc4a1fd) as needed) * Caller states that member suffers from Dementia or Alzheimer’s Disease. * Caller states they are calling for a deceased member(s). | |
| **If the third-party caller…** | **Then...** |
| Answers “Yes” | * Under **Caller’s Response**, select **Yes**. * Click the **Continue** button and proceed to [Step 10](#Step8_Guided_Authentication_Process_CTI).   **Result:** The Interaction Reason popup box displays. |
| Answers “No” | You cannot access the account. If the member is not available to give permission, inform the caller they will have to gain the member’s permission to call on their behalf and call back. |

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| Scenario Guide - Trouble Authenticating? |

Refer to the following scenario as needed:

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| **Scenario** | **Action** |
| Trouble Authenticating? **Note:** If bypassing the authentication screen, caller authentication and HIPAA requirements **must** still be followed. | 1. Click the **Trouble Authenticating?** hyperlink.     **Result:** The Trouble Authenticating? popup displays.   1. Select a **Reason** from the row level action drop down, then click **Next**.     **Note:** If “Other” is selected from the **Authentication Bypass Reasons** dropdown, enter the reason in the **Other Reason** field. The **Next** button illuminates when the reason is selected/entered.    **Result:** Compass displays the following message: “Are you sure you wish to proceed with the reason you selected for trouble authenticating?”     1. Click **Yes**.   **Notes:**   * + To return to **Authentication Bypass Reasons** selection screen, click **Previous**.   + To exit, click **Cancel**.   **Result:** Compass will allow the agent to bypass the authentication token screen.   1. Return to [Step 10](#Step8_Guided_Authentication_Process_CTI) |

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| Scenario Guide - Cancel Authentication |

Refer to the following scenario as needed:

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| **Scenario** | **Action** |
| Cancelling Authentication | **ONLY** select **Cancel Authentication** to return to the **Search by Medicare D** screen for the following reasons:  •       Caller Hung-Up  •       No Caller on the Line  •       Transferred  •       Future Member  •       Call Disconnected  •       Caller Unable to Authenticate  •       Unable to Access Account  **Note:**  Cancel Authentication options are dynamic. Options may be added or removed at any time.  **Close** once the appropriate **Reason for Closing** reason is selected. |

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| Related Screenshots |

Refer to the following screenshots for reference as needed:

* [Fully Authenticated via the CTI auto-population](#_Toc139010814) (Care)
* [Fully Authenticated via the CTI auto-population](#_Toc139010816) (PHD)
* [Compass did not fully authenticate the pharmacy from the IVR](#_Toc139010817)

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| **Screenshot Description** | **Screenshot** |
| Fully Authenticated via the CTI auto-population (Care) |  |
| Fully Authenticated via the CTI auto-population (PHD) |  |
| Compass did not fully authenticate the pharmacy from the IVR |  |

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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)

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