# PeopleSafe - Search Find and View a Member’s Profile in PeopleSafe or RxClaim

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[Search Find and View a Member’s Profile in RxClaim](#_Toc207892598)

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**Description****:** Guidance on searching, finding, and viewing a member’s profile in PeopleSafe or RxClaim and how to resolve account inquiries that are not found or searchable.

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| Process |

Perform the following steps:

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| **Step** | **Action** | |
| **1** | Access the Main Screen/Participant Inquiry Screen and search for the member using their name and date of birth (DOB) or their Caremark Member ID, if available.  When conducting a search, profiles of non-PBM active client members may display who are eligible to receive chronic or wellness screenings through the MinuteClinic and our Retail Pharmacy channels.  **Notes:**   * Fill in one column per search. The function will not work if there is search data in more than one column. Use the Clear button at the lower right to reset between searches. * Do not add a space or an underline prior to the first letter of either name, or before or after the Member ID, or else the system displays an error. This is important when copying/pasting info from Notepad.     There are three columns with Search Criteria fields available.   * **Primary Search:** Using a Member ID. * **Name Search:** Using Name, Date of Birth (DOB), ZIP, or Client Code. * **Secondary/Unique Search:** Using a Mail Order Prescription Number or Order Number, an Order Confirmation Number, or an Explanation of Benefit Number.   **Note:** In most cases we search for Members using their Last Name, First Name, DOB or ID number.  When searching by **Member Name:**   * Some names are usually spelled like McCormick or DiNovo, but they may include a space, like Mc Cormick or Di Novo. * Names may have a hyphen, like Torres-Martinez. Some may be McDonald or MacDonald. Some may include an apostrophe, like D’Agostino. Use at least one letter in the First Name field. * Ask the member for their Date of Birth (DOB) or zip codeto narrow down the search. DOB may be entered with slashes or hyphens, or as a simple string of numbers. * Verify the spelling of the member’s name phonetically to make sure a letter is not being misheard. **Example:** P vs T or S vs F. Refer to [Call Handling: Phonetic Alphabet and De-escalation Tips (108954)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d340e545-7be8-4bd6-bb1e-87f0e23b0211) * The full spelling of the name is best, but you can search by entering the first 4 letters of the last name, **and** at least the first letter of the first name, followed by an asterisk (\*) to perform a “wild card” search for every combination.   This helps to locate accounts with varied spellings, hyphenated surnames, and/or honorifics such as Jr. or Sr. after the name.  **Examples**: Searching for **SMIT\* J\*** will find **SMITH, JOHN**, as well as **SMITS, JAN** and **SMITHERS Jr., JASPER**.    Wildcard (\*) searches only work for the first and last name.  **Note:** The Primary Search (Plan member ID or Internal ID) and Secondary/Unique Searches (Mail Order prescription number, Mail Order number, and Mail Order confirmation number) are used if the account cannot be located initially with name and date of birth search. Add data into one column per search.  **Note:** In rare cases upon searching, searching for an account in PeopleSafe opens an Rx Claim window with the member's information, rather than the typical account window.   * It does this when an account is partially loaded, and not yet available to open in PeopleSafe. * Typically, this occurs within 1-2 business days of the benefit activation date. * To assist in determining if this is what is happening, the Click “New” adjacent to the Participant Inquiry button to search for the member once more and open in PeopleSafe. * If it opens an Rx Claim window again, advise the member their benefits are active, and they can utilize a retail pharmacy. They will be able to utilize Mail Order services and register for Caremark.com in 1-2 business days when the account finishes loading.   **Member ID Search:** Some of our clients have a combined medical and pharmacy ID card that start with Alpha characters.  If using the alpha characters does not return a profile, remove the first character of the ID number. Inform the member this so they can better navigate when using the IVR.  **Example:** A123456, instead use 123456 to search for the member.  **Note:** Some combination cards may require you to modify the ID number further, such as removing zeros from the end, to search for the member. Be patient and methodical when searching for these more uncommon scenarios.   * **If continue to be unable to locate the account, refer to:**   + [Medicare D](#MedicareD)   + [Termed or Inactive Accounts](#TermedorInactiveAccounts)   + [No Access to this beneficiary](#NoAccesstothisbenficiary)   + [CVS Retail Store Inquiry](#CVSRetailStoreInquiry)   + [Specialty Pharmacy](#SpecialtyPharmacy) * If a member cannot be found by searching for their name, date of birth, or the member ID number, refer to the below table: | |
|  | **If…** | **Then…** |
|  | **Medicare D** | Medicare Beneficiary Identifier (MBI)/Health Insurance Claim Number (HICN), also known as the Medicare number on the red, white, and blue card.   * If unable to locate, ask if the account may be under a different or maiden last name. |
|  | **Termed or Inactive accounts** | Search for only the first and last name (wildcard searches with \* are acceptable). A secondary page will display, add the birthdate on this page, and select the **Eligibility Filter** radio button for **Inactive** or **All**.  **Note:** This will assist with determining whether a member’s eligibility is terminated or not on file.   * If the member is located, proceed with the call. * If no beneficiary is found, a Search RxClaim button displays. If active eligibility is found, refer to [PeopleSafe - Resolution of Eligibility Issues (004587)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad278185-117d-433f-bdc2-9327b93c1944) for direction on updating the profile. |
|  | **No Access to this beneficiary** | Refer to [(No Access to this Beneficiary/Colleague or Member Search Returns Error (Account is Only Accessible to Those Dedicated to the Client) (050285)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e29c8b2d-44b0-4165-aa4b-7fa662873563). |
|  | **CVS Retail Store Inquiry**  **(CVS Retail Pharmacies are not utilized exclusively by CVS Caremark members)** | <First name>, I am reaching out to a CVS Customer Service (Front of the Retail Store) representative for assistance with your concern; it may take me a few minutes to reach them. I will be providing your information, so the representative is prepared to assist you.  I will check back with you within 5 minutes to update you; unless you would prefer that I check back with you every few minutes? For your future reference, the phone number for CVS Customer Service (Front of the Retail **1-800-746-7287**). |
|  | **Specialty Pharmacy**  **(CVS Specialty Pharmacy is not utilized exclusively by CVS Caremark members)** | <First name>, I am reaching out to a Specialty Pharmacy representative for assistance with your therapy; it may take me a few minutes to reach them. I will be providing your information, so the representative is prepared to assist you.  I will check back with you within 5 minutes to update you; unless you would prefer that I check back with you every few minutes? For your future reference, the phone number for Specialty Pharmacy Customer Care is **1-800-237-2767** (CareFirst **1-855-264-3237**). |
| **2** | View the **PBM** (Pharmacy Benefits Manager) field to determine if it is a PBM or Non-PBM profile.     * If there are two profiles, click on the profile with a **Y** in the PBM field. * If a non-PBM member contacts Customer Care, redirect the member back to the MinuteClinic or our retail Pharmacy stores. | |
| **3** | Select the patient’s name line (list of members at bottom of screen) then click the **Select** button.    **Notes:**   * **Medicare D Only**: If the MED D Inquiry Tab is selected and the below error message displays, select **New** next to the MED D Inquiry tab to search for the member to view the member eligibility.      * **Offshore Vendors:** When performing this search include **X9110** in the client code field.   + **Exception:** Offshore Vendors, select **New** next to Participant Inquiry Tab to search for the beneficiary. Once beneficiary is located, navigate to the Medicare D Inquiry Tab. | |
| **4** | Occasionally, selecting the correct Member will display an RxClaim screen instead of into the PeopleSafe record. In this case, copy the Plan Member ID, click **Participant Inquiry**/**New** then paste the ID into the appropriate field, and select **Search** to open the page.   * If this process returns to RxClaim, contact the Eligibility Center of Excellence at **1-800-803-1461** (Monday through Friday, 8 am to 5 pm CT) and in most cases they will be able to correct the error and allow access to the PeopleSafe record.   **After Hours:** If the Eligibility Center of Excellence is closed, submit an RM task to request that the file be moved from RxClaim to PeopleSafe.   * **Task Category:** Eligibility * **Task Type:** Ineligible Participant/Spouse/Dependent * **Queue:** Eligibility-San Antonio | |

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| Search Find and View a Member’s Profile in RxClaim |

Uses when unable to locate the member’s eligible profile in PeopleSafe.

**Note:** In rare cases upon searching, searching for an account in PeopleSafe will open an Rx Claim window with the member's information, rather than the typical account window.

* It does this when an account is partially loaded, and not yet available to open in PeopleSafe.
* Typically, this occurs within 1-2 business days of the benefit activation date.
* To assist in determining if this is what is happening, the Click “New” adjacent to the Participant Inquiry button to search for the member once more and open in PeopleSafe.
* If it opens an Rx Claim window again, advise the member their benefits are active, and they can utilize a retail pharmacy. They will be able to utilize Mail Order services and register for Caremark.com in 1-2 business days when the account finishes loading.

Perform the steps below:

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| **Step** | **Action** | |
| **1** | Locate the member then select the **Search RxClaim button.**  **Note:** This function does not display on the Main search screen, but only after the initial search is performed.     1. Input Member ID into the Plan Member ID field. If Member ID is not available, search by name.   **Reminder:** Clear any data from the first column before entering data into the next column.   1. Input the member’s first and last name with date of birth. Click **Search** and select the active line of eligibility then click the **Select** button.   **Note:** Do not add a space or an underline prior to the first letter of either name, or before or after the Member ID, this causes a system display error. This is important when copying/pasting info from Notepad.      **Result:** RxClaim Participant Details screen displays.      **Result:** RxClaim Participant Details screen displays. | |
| **If Active coverage for the member in RxClaim...** | **Then…** |
| Is found | Contact the Eligibility Center of Excellence at **1-800-803-1461**.(Internal Number Only, do not disclose) Monday – Friday 8 am to 5 pm CTto verify if the account can be updated to PeopleSafe.  **After Hours:** If the Eligibility Center of Excellence is closed, submit an RM task to request that the file be moved from RxClaim to PeopleSafe.   * **Task Category:** Eligibility * **Task Type:** Ineligible Participant/Spouse/Dependent * **Queue:** Eligibility-San Antonio |
| Is not found | Continue to the next step. |
| **2** | Locate the member using the Secondary/Unique Search Column:   * Mail Order pharmacy Prescription Number * Order Number * Confirmation Number (for refill orders) * Internal ID (for RxClaim paper claim) | |
| **If the member is…** | **Then…** |
| Located | Proceed with the call. |
| NOT located | For additional instructions, refer to [PeopleSafe - Resolution of Eligibility Issues (004587)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad278185-117d-433f-bdc2-9327b93c1944).  **MED D CCRs:** Refer to [MED D - SilverScript - Resolution of Eligibility (072397)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=34edc9c1-9a73-4751-ac8b-94405d775700) and [MED D - Blue MedicareRx (NEJE) - Resolution of Eligibility. (030308)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3b159d36-1f04-41f4-b5cf-7ea7f741a2d9)  Refer to [Member Cannot be Found.](#MemberCannotBeFoundOptions) |

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| Medicare D Inquiry Search |

Perform the following steps:

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| **Step** | **Action** |
| **1** | Access the Medicare D Inquiry Screen and search for the member using their name, Caremark Member ID, MBI, or phone number.    There are four Search Criteria fields available.   * **External ID:** Using a Member ID. * **Name Search:** Using Last Name/First Name * **MBI/HICN Search:** Using the beneficiary’s MBI (Medicare Beneficiary Identifier) * **Phone Number Search:** Using the phone number on file.   **Note:** In most cases we search for Members using Last Name, First Name, or Member ID number. |
| **2** | Enter the appropriate search criteria and select **Search**.   * If searching by **External ID**, **MBI/HICN**, or **Phone Number**, the Medicare D inquiry screen will display the beneficiary’s information. If multiple accounts display, select the button by the active account for the correct beneficiary and then click **Select**. * If searching by **Last Name/First Name,** a list of beneficiaries will display. Select the button by the correct beneficiary and then click **Select**. The Medicare D Inquiry screen will display the beneficiary’s information. |

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| **Member Search Returns Error (Account is Only Accessible to Those Dedicated to the Client)** |

Refer to [PeopleSafe - No Access to this Beneficiary/Colleague or Member Search Returns Error (Account is Only Accessible to Those Dedicated to the Client) (050285)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e29c8b2d-44b0-4165-aa4b-7fa662873563)

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| Related Documents |

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

[Log Activity/Capture Activity Codes (005164)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bdac0c67-5fee-47ba-a3aa-aab84900cf78)

**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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