# Compass - Member Search

[Search by Member](#_Toc205895176)

[Search by Member When No Match Found - Additional Search Parameters](#_Toc205895177)

[Aetna System](#_Toc205895178)

[Third Party (Externally) Adjudicated](#_Toc205895179)

[Search by Retail Rx](#_Toc205895180)

[Search by Mail Order Rx/Internal ID](#_Toc205895181)

[Search by Medicare D](#_Toc205895182)

[Eligibility Resolution Scenario Guide](#_Toc205895183)

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[Member Search Scenario Guide](#_Toc205895185)

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**Description****:** Member Search functionality for Compass, including Search by Member, Search by Retail Rx, and Search by Mail Order Rx/Internal ID is outlined.

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| Search by Member |

**Reminder:** If viewing an account and need to find other coverage for the member, refer to [Compass - View Additional Coverage (050042).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=77e166f8-02ac-4c9f-8a3f-321cab8af5f8)

**Notes:**

* Member Search results display active eligibility based on the current date. To view future or past eligibility, use the inactive coverage Search filter.
* A search can be conducted at any time. It is not necessary to close the members’ account to use the Search feature. Alternate between the **Member Case** tab and **Search** **(New UI)** tab.

Perform the steps below:

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| **Step** | **Action** | | | |
| **1** | From the Compass **Search (New UI)** screen, select the **Search by** **Member** tab (default) to search by member.  This screen contains the following fields:   * First Name (one character minimum) * Last Name (three character minimum) * DOB (Date of Birth) (format MM/DD/YYYY) * Zip Code (numbers only) * Member ID * MBI (Medicare Benefit Identification) * Carrier Code * Aetna Eligibility | | | |
| **2** | Perform a search using any of the following criteria:  **Scenarios:** If searching by (Select appropriate hyperlink to view the resolution):   * [Member ID](#IfsearchingbymemberID) * [First & Last Name](#Ifsearchingbyfirstandlastname) * [First & Last Name and Date of Birth (DOB)](#Ifsearchingbyfirstandlastnameanddob) * [Zip Code and Last Name](#Ifsearchingbyzipcodeandlastname) * [MBI](#Ifsearchingbymbi) * [Carrier Code and First & Last Name, or Member ID](#Ifsearchingbycarriercodeandfirstandlastn) * [Carrier Code (by Client Name Search)](#Ifsearchingbycarriercodebynamesearch)     For any accounts returned in **Search by Member** that the agent does not have access to, all but the last four digits of the ID will be hidden. | | | |
| **If searching by…** | **Then…** | | |
| **Member ID** | Complete the **Member ID** field, then click **Search**.  **Notes:**   * Do not also enter a number in the **MBI** field. When both Member ID and MBI ID are used to search, the following error message will display: “Enter only one: Member ID or MBI to search.” * When using the Member ID to locate dependents and/or a spouse account the person code (last two numbers of the ID number) may need to be removed to find the account in Compass. * 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.   + If the correct account is found this way, inform the member so they can better navigate using the IVR in the future. **Example:** A123456, instead use 123456 to search for the member. * 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. | | |
| **First & Last Name** | Complete the **First Name** and **Last Name** fields, then click **Search**.  **Notes:**   * Incorrectly populated fields will result in an error. * The full spelling of the name is best, but you can search by entering the first 3 letters of the last name, **and** at least the first letter of the first name to perform a **“wild card”** search for every combination.   **Examples:** Searching for **SM J** will find **SMITH, JOHN**, as well as **SMITS, JAN,**and **SMITH Jr., JASPER**.   * Verify the spelling of the member’s name phonetically to make sure a letter is not being misheard. Refer to [Call Handling: Phonetic Alphabet and De-escalation Tips (108954)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d340e545-7be8-4bd6-bb1e-87f0e23b0211).   **Example:** | | |
| **First &** **Last Name**  **and**  **Date of Birth (DOB)** | Complete the **First Name**, **Last Name**,and **DOB** fields, then click **Search**.  **Note:** Incorrectly populated fields will result in an error.  **Example:** | | |
| **Zip Code**  **and**  **Last Name** | Complete the **Zip Code** and **Last Name** fields, then click **Search**.  **Note:** Incorrectly populated fields will result in an error.  **Example:** | | |
| **MBI** | Complete the **MBI** field, then click **Search**.    **Notes:**   * MBI is only used for Medicare members (MBI number can be found on their Medicare ID card). * Do not enter a number in the **Member ID** field. When both Member ID and MBI number are used to search, the following error message is displayed: “Enter only one: Member ID or MBI to search.” | | |
| **Carrier Code**  **and**  **First & Last Name, or Member ID** | Complete the **Carrier Code** and **First Name** & **Last Name** fields, or the **Carrier Code** and **Member ID** fields.  **Note:** Incorrectly populated fields will result in an error. | | |
| **Carrier Code (by Client Name Search)** | 1. Click the **Magnifying glass** search button to initiate the search.     **Result:** Find a Client screen displays.     1. Complete the **Client Name** field, then click **Find**.   **Result:** Client Search Results display.   1. Click the corresponding **Carrier Code** link associated with the correct Client Name.   **Note:** To return to the Search by Member screen without selecting a Carrier Code, click **Close** on the Client Search Results screen.    **Result:** The Search by Member screen displays, where the Carrier Code will be prepopulated in the **Carrier Code** field. | | |
| **3** | Determine if a match is found. | | | |
| **If…** | **Then…** | | |
| **Yes** | The Access Member Information window displays.  **Note:** An interaction case will automatically open when receiving a call.       * **Do Not** select “I am working offline (no active call)” when performing a Manual Member Search while on an inbound call. * When the **Accessing Member Information** pop-up displays, select **Interaction** or **Research Case** from the dropdown menu. * Only agents who are working offline should check the “I am working offline (no active call)” checkbox.   **Notes:**   * If performing an activity involving direct interaction/communication with a caller, select **Interaction Case** (default), then click **Continue** to proceed to Guided Authentication. * If performing an activity **not** involving direct caller interaction or service, select **Research Case**, then click **Continue** to proceed to theMember SnapshotLanding Page. * Once authentication is completed, if the member is calling regarding multiple members on the account, refer to the [Scenario Guide](#_Member_Search_Scenario) below. | | |
| **No** | One of the following two error messages displays: | | |
| **If...** | **Then...** | |
| **No members were found that matched your search criteria.** | Return to **Step 2** above and perform a new search as needed.  After a new search is conducted and no account is found, refer to the [Search by Member When No Match Found - Additional Search Parameters](#_Search_by_Member) section below. | |
| **No active records were found. Inactive Accounts returned.** | 1. Click **Open**.     **Result:** The Search Results section on the Search by Member screen will display with the Inactive radio button selected.   1. Validate information found in the Search Results columns to locate the correct Member ID. 2. Click the **Member ID** hyperlink to access the correct member account. | |
| **Multiple matches are found** | Multiple Member IDs are displayed in the **Search Results** section on the Search by Memberscreen.   1. Validate information found in the **Search Results** columns to verify the correct member account. 2. Click the **Member ID** hyperlink to access the correct member account.     **Note**: If the member has a secondary plan, the icon will display next to the secondary account in the Carrier ID field. | | |
| **Dedicated Client**  **message displays** | This message indicates the user is unable to access the account. Follow the steps described in the message.    **Note:** If not trained in Client Pharmacy accounts, do not contact the Senior Team for assistance. Follow the steps described in the message. | | |
| **CVS Caremark Employee Accounts** | These messages indicate the user is unable to access this account. Follow the steps described in the message. | | |
| **Transfer to onshore agent**  Applicable to Offshore agents only. | These messages indicate that only onshore agents are authorized to handle this call.    **Note**: This image is blurred on purpose    Review the following when either of these pop-up displays. | | |
| **If…** | | **Then…** |
| Health Plan clients | | Warm Transfer to 1-855-297-2070. **Do Not** use for EGWP warm transfers.     Let me get you over to the correct department who will be able to assist you further.    Refer to [Compass - Basic Call Handling – Opening the Call, Call Hold, Warm and Cold Transfer (066076).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0)    **Note:**If the call is received outside of Solon’s normal business hours transfer the call to the Senior Team. Solon’s normal business hours are:   * Monday - Friday: 6:00 am - 9:00 pm CT (7:00 am – 10:00 pm ET) * Saturday - Sunday: 6:00 am – 7:00 pm CT (7:00 am – 8:00 pm ET) |
| EGWP Clients | | Warm Transfer to 1-855-297-2115. **Do Not** use for Health Plan warm transfers.    Let me get you over to the correct department who will be able to assist you further.    Refer to [Compass - Basic Call Handling – Opening the Call, Call Hold, Warm and Cold Transfer (066076).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0) |
| Unable to determine if a Health Plan or EGWP account    **OR**    Unable to pull up the account in Compass | | Contact the Senior Team for assistance.    Refer to   * [Compass - Basic Call Handling – Opening the Call, Call Hold, Warm and Cold Transfer (066076)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0) * [Compass MED D - When to Transfer Calls to the Senior Team (062944)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7) |
| Beneficiary would like to speak to someone else | | Transfer to the Senior Escalation Team.    Let me get you over to the correct department who will be able to assist you further.    Refer to   * [Compass - Basic Call Handling – Opening the Call, Call Hold, Warm and Cold Transfer (066076)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0) * [Compass MED D - When to Transfer Calls to the Senior Team (062944).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7) |

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| Search by Member When No Match Found - Additional Search Parameters |

Perform the steps below:

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| **Step** | **Action** | | |
| **1** | When no members are found that matched your search criteria, additional **Search Parameters** are displayed at the bottom of the Search by Member screen.    Perform a search using **one** of the following Search Parameters:   * [Aetna System](#_Toc146641694) * [Third Party (Externally) Adjudicated](#_Toc146641695) | | |
| **If using the Search Parameter…** | **Then...** | |
| Aetna System | Do not ask the members if they have Aetna. Use the Aetna System search parameter to attempt to locate the member’s account without advising the caller of the search process.   1. Click the **Aetna System** button to begin searching in the Aetna Eligibility systems.   **Result:** Check Aetna Eligibilitypopup displays.       1. Primary search criteria must be entered for valid search results:    * Member ID, or    * First Name, Last Name, and DOB 2. Click **Search** and proceed to [Step 2](#NoMatchStep3) in this section to continue. | |
| Third Party (Externally) Adjudicated | If unable to locate the correct account in the **Search Results** section on the Search by Member screen, search the externally adjudicated accounts.  Wildcard searches cannot be performed for externally adjudicated accounts; the full name must be entered.  When searching a member’s account by name and dob, if they have previous accounts whether active or not active, the search results display for the non-externally adjudicated account in the search results.  Do not advise the caller that you are searching for the Third-Party Adjudicator to locate the account. Use the search parameter to attempt to locate the member’s account without advising the caller of the search process.   1. Click the **searching accounts that are externally adjudicated** link above the Search Results filters.     **Result:** If externally adjudicated accounts are found, Member account linked to the ID # entered will populate in the search results. Refer to [Compass – Externally Adjudicated Member (Identify, Test Claims, New Rx, and Refills) (066771)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ca3ec756-d18c-4dfd-b0c3-f1cbcdf62f13)) for more information.   1. Assist the member by referring to [Compass – Externally Adjudicated Member (Identify, Test Claims, New Rx, and Refills) (066771)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ca3ec756-d18c-4dfd-b0c3-f1cbcdf62f13).     **Note:** Third Party (Externally) Adjudicated accounts can also be found using the link on Search by Mail Order Rx/Internal ID screen and Search by Member screen. | |
| **2** | Proceed depending on whether a match is found. | | |
| **If...** | **Then...** | |
| **A match is found** | Proceed depending on the Search Parameter: | |
| **If…** | **Then…** |
| **Aetna System** | Warm Transfer to the Aetna Senior Team **1-844-203-6242**. |
| **Third Party (Externally) Adjudicated** | Refer to [Compass – Externally Adjudicated Member (Identify, Test Claims, New Rx, and Refills) (066771)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ca3ec756-d18c-4dfd-b0c3-f1cbcdf62f13). |
| **A match is not found** | If no members were found based on the search criteria entered, a system error message or a no members found message displays.  Return to [Step 1](#NoMatchStep2) in thissection and perform a new search using a different Search Parameter.  **Note:** If no match is found after exhausting all Search Parameters. Refer to [Compass - Resolution of Eligibility Issues (062827)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cba9d073-9e46-4d90-b86f-4566793c40f3). | |
| **Multiple matches are found in the same list** | Multiple results are displayed in the **Search Results** section.    Use the table below as needed: | |
| **If using the Search Parameter…** | **Then…** |
| **Aetna System** | * Ask the caller the name of their insurance carrier.   Who is your insurance through (SilverScript, Blue Medicare Rx)?   * Use the **Search Results** to identify the correct carrier by searching for the Carrier ID in theSource.   + **If a match is found Transfer to Aetna Senior Team to build eligibility file, 1-844-203-6242.**   + **If a match is not found: Refer to** [Compass - Resolution of Eligibility Issues (062827)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cba9d073-9e46-4d90-b86f-4566793c40f3)**.** |

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| Search by Retail Rx |

**Notes:**

* Retail Rx Search results will display active eligibility based on the current date. To view future or past eligibility, use the inactive coverage Search filter.
* A search can be conducted at any time. It is not necessary to close the members’ account to use the Search feature. Alternate between the **Member Case** tab and **Search (New UI)** tab.

Refer to table:

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | **Action** | | |
| **1** | From the **Search (New UI)** screen, select the **Search by** **Retail Rx** tab to search by Retail Rx.  This screen contains the following fields:   * NPI/NCPDP (numeric 7 Digit NCPDP or 10 Digit NPI) * Transmitted Date (format MM/DD/YYYY - defaults to current) * Fill Date (format MM/DD/YYYY) * Retail Rx Number | | |
| **2** | Perform a search using any of the following criteria: | | |
| **If searching by…** | **Then…** | |
| **NPI/NCPDP** | 1. Complete the **NPI/NCPDP** field. 2. Click **Search**.   **Result:** Pharmacy name displays underNPI/NCPDP field. Information populated in this field will carry over to the NPI field on the Authentication screen.  **Note:** Incorrectly populated fields results in an error including, but not limited to: | |
| **NPI/NCPDP**  and  **Transmitted Date**  and/or  **Fill Date** | 1. Complete the **NPI/NCPDP** field,the **Transmitted Date** field, **AND/OR** the **Fill Date** field. 2. Click **Search**. 3. Adjust Transmitted Date and Fill Date as needed to locate the account.   **Note:** Incorrectly populated fields will result in an error including, but not limited to: | |
| **Retail Rx Number**  and  **Transmitted Date**  and/or  **Fill Date** | 1. Complete the **Retail Rx Number** field, the **Transmitted Date** field, the pharmacy NPI **AND/OR** the **Fill Date** field. 2. Click **Search**. 3. Adjust Transmitted Date and Fill Date as needed to locate the account.   **Note:** Incorrectly populated fields will result in an error including, but not limited to: | |
| **3** | Determine if a match is found. | | |
| **If…** | **Then…** | |
| **Yes** | The Access Member Information window displays.  **Note:** An interaction case will automatically open when receiving a call.       * **Do Not** select “I am working offline (no active call)” when performing a Manual Member Search while on an inbound call. * When the **Accessing Member Information** pop-up displays, select either **Interaction** or **Research Case** from the dropdown menu. * Only agents who are working offline should check the “I am working offline (no active call)” checkbox. * If performing an activity involving direct interaction/communication with a caller, select **Interaction Case** (default), then click **Continue** to proceed to theAuthenticationscreen. * If performing an activity that does **not** involve direct caller interaction or service, select **Research Case**, then click **Continue** to proceed to the **Member Snapshot** screen.   + If an interaction case is open, the following message displays with a link to navigate to the already opened Interaction Case: “You can only have one Interaction Case open at a time. For more details, please click here.” | |
| **No** | The following error message displays: **No results were found that matched your search criteria**.    Return to **Step 2** above and perform a new search as needed. | |
| **Multiple matches are found** | Multiple member options are displayed in the **Search Results** section on the Search by Retail Rx screen.   1. Proceed to validate information found in the **Search Results** columns to verify the correct member account. 2. Click the **Member ID** hyperlink to access the correct member account.     **Note**: If the member has a secondary plan the icon will display next to the secondary account in the Carrier ID field. | |
| **Dedicated Client**  **message displays** | This message indicates the user is unable to access the account. Follow the steps described in the message.    **Note:** If not trained in Client Pharmacy accounts, do not contact the Senior Team for assistance. Follow the steps described in the message. | |
| **CVS Caremark Employee Accounts** | These messages indicate the user is unable to access this account. Follow the steps described in the message. | |
| **Transfer to onshore agent**  Applicable to Offshore agents only. | These messages indicate that only onshore agents are authorized to handle this call.      Review the following when either of these pop-up displays | |
| **If…** | **Then…** |
| Health Plan clients | Warm Transfer to 1-855-297-2070. **Do not** use for EGWP warm transfers.     Let me get you over to the correct department who will be able to assist you further.    Refer to [Compass - Basic Call Handling – Opening the Call, Call Hold, Warm and Cold Transfer (066076).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0)    **Note:**If the call is received outside of Solon’s normal business hours transfer to the Senior Team. Solon’s normal business hours are:   * **Monday - Friday:** 6:00 am - 9:00 pm CT (7:00 am – 10:00 pm ET) * **Saturday - Sunday:** 6:00 am – 7:00 pm CT (7:00 am – 8:00 pm ET) |
| EGWP Clients | Warm Transfer to 1-855-297-2115. **Do not** use for Health Plan warm transfers.     Let me get you over to the correct department who will be able to assist you further.    Refer to [Compass - Basic Call Handling – Opening the Call, Call Hold, Warm and Cold Transfer (066076).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0) |
| Unable to determine if a Health Plan or EGWP account    **OR**    Unable to pull up the account in Compass | Contact the Senior Team for assistance.    Refer to   * [Compass - Basic Call Handling – Opening the Call, Call Hold, Warm and Cold Transfer (066076)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0) * [Compass MED D - When to Transfer Calls to the Senior Team (062944)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7) |
| Beneficiary would like to speak to someone else | Transfer to the Senior Escalation Team.    Let me get you over to the correct department who will be able to assist you further.    Refer to   * [Compass - Basic Call Handling – Opening the Call, Call Hold, Warm and Cold Transfer (066076)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0) * [Compass MED D - When to Transfer Calls to the Senior Team (062944)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7) |

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| Search by Mail Order Rx/Internal ID |

**Notes:**

* Mail Order/Internal ID Search results display active eligibility based on the current date. To view future or past eligibility dates use the inactive coverage Search filter.
* A search can be conducted at any time. It is not necessary to close the members’ account to use the Search feature. Alternate between the **Member Case** tab and **Search (New UI)** tab.

Refer to table:

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | **Action** | | |
| **1** | From the Compass **Search (New UI)** screen, select the **Search by Mail Order/Internal ID** tab to search by Mail Order Rx.  This screen contains the following fields:   * Mail Rx Number * Order Number * Member Internal ID     For any accounts returned in **Search by Mail Order Rx/Internal ID** that the agent does not have access to, all but the last four digits of the ID will be hidden. | | |
| **2** | Perform a search using **one** of the following criteria: | | |
| **If searching by...** | **Then...** | |
| **Mail Rx Number** | 1. Complete the **Mail Rx Number** field. 2. Click **Search**.   **Result:** Member account linked to the Rx # entered populates. | |
| **Order Number** | 1. Complete the **Order Number** field. 2. Click **Search**.   **Result:** List of member account(s) linked to the order # entered populates.  **Note:** Multiple results may be returned if orders contain prescriptions for multiple members. | |
| **Member Internal ID** | 1. Complete the **Member Internal ID** field. 2. Click **Search**.   **Result:** Member account linked to the ID # entered populates. | |
| **3** | Determine if a match is found. | | |
| **If...** | **Then...** | |
| **Yes** | The Access Member Information window displays.  **Note:** An interaction case will automatically open when receiving a call.       * **Do Not** select “I am working offline (no active call)” when performing a Manual Member Search while on an inbound call. * When the **Accessing Member Information** pop-up displays, select **Interaction** or **Research Case** from the dropdown menu. * Only agents who are working offline should check the “I am working offline (no active call)” checkbox. * If performing an activity involving direct interaction/communication with a caller, select **Interaction Case** (default), then click **Continue** to proceed to the Authentication screen. * If performing an activity that does **not** involve direct caller interaction or service, select **Research Case**, then click **Continue** to proceed to the **Member Snapshot** screen. | |
| **No** | The following error message is displayed at the top of the screen: **No results were found that matched your search criteria**.    Return to **Step 2** above and perform a new search as needed. | |
| **Multiple matches are found** | Multiple member options are displayed in the **Search Results** section on the Search by Mail Order/Internal ID screen.   1. Proceed to validate information found in the **Search Results** columns to verify the correct member account. 2. Click the **Member ID** hyperlink to access the correct member account. | |
| **Dedicated Client message displays** | This message indicates the user is unable to access the account. Follow the steps described in the message.    **Note:** If you are not trained in Client Pharmacy accounts, do not contact the Senior Team for assistance. Follow the steps described in the message. | |
| **CVS Caremark Employee Accounts** | These messages indicate the user is unable to access this account. Follow the steps described in the message. | |
| **Transfer to onshore agent**  Applicable to Offshore agents only. | These messages indicate that only onshore agents are authorized to handle this call.      Review the following when either of these pop-up displays | |
| **If…** | **Then…** |
| Health Plan clients | Warm Transfer to 1-855-297-2070. **Do not** use for EGWP warm transfers.    Let me get you over to the correct department who will be able to assist you further.    Refer to [Compass - Basic Call Handling – Opening the Call, Call Hold, Warm and Cold Transfer (066076)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0).    **Note:**If the call is received outside of Solon’s normal business hours transfer to the Senior Team. Solon’s normal business hours are:   * **Monday - Friday:** 6:00 am - 9:00 pm CT (7:00 am – 10:00 pm ET) * **Saturday - Sunday:** 6:00 am – 7:00 pm CT (7:00 am – 8:00 pm ET) |
| EGWP Clients | Warm Transfer to 1-855-297-2115. **Do not** use for Health Plan warm transfers.     Let me get you over to the correct department who will be able to assist you further.    Refer to [Compass - Basic Call Handling – Opening the Call, Call Hold, Warm and Cold Transfer (066076)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0). |
| Unable to determine if a Health Plan or EGWP account    **OR**    Unable to pull up the account in Compass | Contact the Senior Team for assistance.    Refer to:   * [Compass - Basic Call Handling – Opening the Call, Call Hold, Warm and Cold Transfer (066076)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0) * [Compass MED D - When to Transfer Calls to the Senior Team (062944)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7) |
| Beneficiary would like to speak to someone else | Transfer to the Senior Escalation Team.     Let me get you over to the correct department who will be able to assist you further.    Refer to   * [Compass - Basic Call Handling – Opening the Call, Call Hold, Warm and Cold Transfer (066076)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0) * [Compass MED D - When to Transfer Calls to the Senior Team (062944).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7) |

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| Search by Medicare D |

Refer to table:

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| **Step** | **Action** |
| **1** | Click the **Medicare D System** button to begin a Medicare D Search.  **Result:** The Search by Medicare D popup displays.    **Tip:** Click the **Close** button at any time to return to the **Search by Member** page if needed.  Search by any of the following parameters by completing the field(s) and clicking **Search:**   * First & Last Name * Member ID * MBI (**Note:** MBI is only used for Medicare members. MBI number can be found on their Medicare ID card). * Phone Number   **Note:** If no information is entered within any of the search parameter fields, or if fields are populated incorrectly, an error message displays below the field.  **Example:**    **Tip:** After receiving an error message, click the **Clear** button to clear all the search parameter fields and enable the **Search** button.  **Result:** Search by Medicare D **Search Results** display. |
| **2** | Review the **Search Results** section.    **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.” |

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| Eligibility Resolution Scenario Guide |

Review the CIF to determine who handles eligibility. If we do not handle eligibility, provide information listed in the CIF to the caller.



* For a possible client impacting eligibility issue, refer to [Submitting Feedback and Reporting Client Issues (002194)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e454e036-8be6-420e-81d2-10b8a1394af4). Do **not** contact the Senior Resolution Team.
* If a member is out of medication and is unable to wait for the turnaround time for the Support Task to be worked, contact the Senior Team.
* If client is Medicare D refer to [MED D – SilverScript – Resolution of Eligibility (072397)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=34edc9c1-9a73-4751-ac8b-94405d775700).
* For Blue MedicareRx (NEJE) refer to [MED D - Blue MedicareRx (NEJE) - Resolution of Eligibility (030308)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3b159d36-1f04-41f4-b5cf-7ea7f741a2d9).

**Notes:**

* If not finding member’s account, perform a name and date of birth search to look for other lines of eligibility.
* Ask probing questions to confirm the member has coverage through the PBM then ask the member if their name has been changed.

To create a Support Task, refer to the [Submitting an Eligibility Support Task](#_Submitting_an_Eligibility) section below.

Refer to [Compass - Resolution of Eligibility Issues (062827)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cba9d073-9e46-4d90-b86f-4566793c40f3).

Utilize the scenario guide for the following situations:

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| **Scenario** | **Action** |
| Eligibility is not found. | Refer to [Compass - Resolution of Eligibility Issues (062827)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cba9d073-9e46-4d90-b86f-4566793c40f3). |
| The member has an account under the client but is shown as not eligible. | Create a Support Task.  **Task Type:** Ineligible Participant/Spouse/Dependent  **Note:** One task should be submitted for all family members. Do not send a separate task for each person. |
| Allowed claim Type(s) is blank or listed as unknown. | * If the member does not need to fill the prescriptions now, create a Support Task.   **Task Type:** Ineligible Participant/Spouse/Dependent   * If a member needs refills at the pharmacy now, contact the Eligibility Center of Excellence at **1-800-803-1461**. |
| Claims rejecting for secondary coverage, but member indicates it should be primary. | Review the CIF for alternate insurance flag (Reject 41) information and warm transfer to the Senior Team ([Compass - When to Transfer Calls to the Senior Team (057524)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7653e7c2-1a97-42a0-8a81-6267c72e1ca9) to perform a possible procedural transfer. |
| Pharmacy is processing prescription, but the system is not accepting.  The pharmacy may receive Reject 09 “M/I Birthdate” even though the DOB is correct. The system displays this error when Eligibility information is incorrect. | 1. Validate processing information from the Retail Logic section of the CIF. 2. Verify the pharmacy uses the correct Member ID and person code.    * If no processing errors are found, create a Support Task.   **Task Type:** Ineligible Participant/Spouse/Dependent  **Notes Field:** Include the information and steps taken to validate the member’s account. |
| An account is located in Compass and a member, spouse, dependent is not on file. | Create a Support Task.  **Task Type:** Member/Spouse/Dependent Not on File  **Notes:**   * One task should be submitted for all family members. Do not send a separate task for each person. * Medicare and EGWP accounts are individual accounts. If the member is part of a MED D/EGWP account, search for a separate account first. |
| An account cannot be found in Compass, and member states they are supposed to have coverage and Caremark handles the eligibility.  **Notes:**   * Confirm the client’s name and locate the CIF in theSource to verify who handles the eligibility. * Ask the caller when their plan or member eligibility should be effective. | * If Caremark handles eligibility, refer to [Compass - Resolution of Eligibility Issues (062827)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cba9d073-9e46-4d90-b86f-4566793c40f3). * If **no** CIF is found, then ask if they are using CVS Specialty and for the name of the medication. If a Specialty drug name refer to [CTS Specialty Drug List (005035)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=4285ff10-756a-437f-8415-0cd84e7e98b4), provide the [CVS Specialty Pharmacy’s phone number (004378)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f22eb77e-4033-4ad9-9afb-fc262f29faad) and perform a warm transfer. |
| Twins | Setup permanent ID by creating a Support Task:  **Task Type:** Multiple Birth  **Note:** One task is created for twins with the same DOB under the member’s name. |
| Member cannot be found by searching their name, date of birth, or the member ID number **and**they are calling regarding a Specialty inquiry | Ask if they are using CVS Specialty and for the name of the medication. If a Specialty drug name refer to [CTS Specialty Drug List (005035)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4285ff10-756a-437f-8415-0cd84e7e98b4), provide CVS Specialty Pharmacy’s phone number and perform a warm transfer. |
| Members’ account will be effective on a future date. | 1. Ask for the plan/client’s name and search for a CIF. 2. Review the CIF for instructions about Open Enrollment and for Universal IDs to run Test Claims.    * If CIF is not found, advise the caller to check back on the effective date of coverage.    * If the Universal ID displays a message that the account is not active, you can proceed into the account and support the member. Plans may be loaded before their active dates.   **Note:** General benefit information can be released, such as plan design. |
| Newborns | Newborn coverage is based on the client. Review the CIF.   * If the CIF indicates **Yes** for Newborn Coverage, it will be followed with instructions on how the coverage is processed. * If the CIF indicates **No** or is blank for Newborn Coverage, process the prescription request using the mother’s name and date of birth. This means that there is no additional plan coverage for newborns and within a certain time frame the parent would need to add the child to the plan. |
| Benefits office (broker, person from the plan) calling to update a member’s account.  **Note:** Ensure the person on the phone has the capacity to provide and upload an eligibility file. | Warm transfer to the Eligibility department for updates at **1-800-803-1461**(internal number only, do not disclose to member).  TheEligibility Center of Excellence will not speak with the Benefits office if the member is on the line. Only the Benefits office may be transferred to Eligibility Center of Excellence. |
| RxClaim displays correct name or date of birth however Compass is updated incorrectly. | Call and notify the CVS Eligibility Center of Excellence at **1-800-803-1461** (internal number only, do not disclose to member) but do not transfer the member. |
| * Member states a specific account should not be active. * Changes to date of birth(DOB), name changes, gender, etcetera. | Advise the member to contact their Benefits Office. |

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| Submitting an Eligibility Support Task |

**Note:** From the **Case Data** section that displays on Compass screens, click the **Create Support Task** button.

Take the following actions when creating an Eligibility Support Task:

* **Task Type:** Choose from the above listing of the [Eligibility Resolution Scenario Guide](#_Eligibility_Resolution_Scenario).
* Fill out Required Information.
* Include Detailed notes in the **Notes** field.

Refer to [Compass - Create a Support Task (050031)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6) and [Compass - Support Task Types and Uses List (058147)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6753488f-3996-45d9-88ba-257575369a98) as needed.

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| Member Search Scenario Guide |

Refer to the following scenarios as needed:

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| **Scenario** | **Action** |
| **Member calling for multiple members.** | From the **Member Snapshot**, navigate to the **Member Details** section and click the **View Related Members** hyperlink.    **Result:** Related Family Members popup displays.    **Notes:**   * To exit the Related Family Members popup, click **Cancel**. * The system only shows corresponding lines of coverage for each member on the account. * When the user selects the family member name hyperlink from the modal, the member’s information displays. |

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| Related Documents |

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

**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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