**Caremark.com – Electronic EOBs and Paperless Documents (MED-D)**

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**Description:** Provides instructions for members who want to access/view their Explanation of Benefit (EOB) statements, as well as other paperless documents available electronically from My Document Source (MDS) on Caremark.com. Members must be registered on Caremark.com.

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| **General Information** |

Medicare D beneficiaries can **opt in** or **opt out** of paperless Electronic EOBs (eEOB) at any time by calling Customer Care or on Caremark.com.

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| Electronic EOBs – My Document Source |

Perform the steps below:

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| **Step** | **Action** | |
| **1** | Do you have an account on Caremark.com? | |
| **If beneficiary says…** | **Then…** |
| Yes | * Great. It will only take a minute to request the change to opt-in to paperless statements. * Up to 36 months of your EOB history is available on Caremark.com, and you can begin to access them immediately. * Once we’ve processed your paperless EOB request, you will receive an email from My Document Source each time a new online EOB is available. * If at any time you wish to opt-out of paperless statements, you can change your preferences in your Caremark.com account profile/Communication Preferences or on the My Document Source portal.   Proceed to Step 2. |
| No | Proceed to Quick Registration Workflow. |
| **2** | You will need to sign in on **Caremark.com**.  Refer to [Caremark.com Log in and Registration (Carrier to Carrier) Enhancements (058095)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=dd7f8b9f-cf1b-4f7c-86f7-ac6e0a015452).  **Note:** Members who have or have had more than one plan with CVS Caremark in the past 36 months based on termination date have a new feature displayed on the dashboard titled “**View my plans.”** This allows members to access any of their plans by just clicking on the link, selecting the plan they want to access, and **sign in with the same username and password.**  For users who only have one username, there will be no impact.   * If the member is not seeing their current plan or the plan they wish to sign into from “View my Plans,” submit a Web Error Form requesting further research to locate and delete the registration. Refer to [Caremark.com – Web Error Form Process (Commercial and MED-D) (050504) (041424)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a082ab2a-cbb5-4803-a27a-339f8c30cac9) and [Caremark.com - Web Error Form Process (Vendor Teams Only) (046777)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=97f7ff71-4831-453d-b292-183506cab4d2). | |
| **3** | **a.**  When signed in, click on **Plan & Benefits** tab. From the drop-down menu, click on **Plan Benefit Documents**.  b.  Click **Continue**. | |
| **4** | **Note:** If the member does not have any claims or has never received an EOB in the past, they are directed to the **Welcome to My Document Source Secure Document Portal** page below.  When the first EOB becomes available, you will be able to access your EOB statement automatically on Caremark.com.  **Note:** It will not be necessary for the member to create an account or log in to My Document Source.    **Result:** My Document Sourcedisplays showing EOB history with links to **view** and **download** PDF files for EOB statements for up to 36 months (three (3) years) of past beneficiary history.  **Note:** The My Document Source page opens in a new window or tab.   * Members might need to **disable or turn off pop-up blockers** for the browser they are using to view the page. * Safari browser users might not be able to view their EOBs or might not be able to view all the pages. Advise member to be sure they are using the most up-to-date version of Safari available or suggest member try using a different browser such as Chrome or Firefox.   **Account Features:**   * Additional documents such as Annual Notice of Change (ANOC), Formulary, Evidence of Coverage (EOC), Transition Fill letters, and Pharmacy Directory are also be available for SilverScript and NEJE members. * “Quick access” most recent copy of documents.   • New icon for newly received documents.   * Member can request a hard copy “Need a copy sent to you in the mail?” * Mobile & Tablet Support. * 13 languages supported for browser pages and registration. * All pages 508 and WCAG compliant. | |

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| Electronic EOBs – Registering or Logging in Directly from My Document Source |

Perform steps below:

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| **Step** | **Action** |
| **1** | Determine If the member accesses the **My Document Source portal (mds.memberdoc.com/login)** directly and is taken to the **Log In** or **Create Account** page, instruct the member as follows:   * If **already** registered for My Document Source, advise the member to log in with the username/password they had created when registering for MDS initially. * If registering from My Document Source, follow the steps below:   **My Document Source** **Secure Document Portal** account registration page displays.   * Complete the form. * Consent to receive all available plan documents digitally. * Review and agree to the Privacy Policy. * Click **Create Account**.   **Notes:**   * Advise the member to enter their Medicare Number with **no** dashes/hyphens. * Thefollowing message, **“This email address is used by another account. Please use another email address to setup your account,”** ifhusband and wife share the same email address and one of the members have already registered. If the members do not have another email, a new email address needs to be created to allow the other member to register for My Document Source. |
| **2** | After **Create Account** is selected, the member receives a confirmation email advising: **“You’re one step away from finishing your account registration.**   1. Click the link below to confirm your email address.   **Note:** This link will expire in 24 hours.”   * The email is from **noreply@memberdoc.com**. * Subject: **"My Doc Source Access"**.  1. Click on the  link in the email to complete the registration for My Document Source. |
| **3** | Member must create a **Password** and Confirm **Password**. Click **Submit**. |
| **4** | Set up the three (3) **Security Questions** and **Answers** to complete the registration. Click **Submit** to finish registering for My Document Source.    **Result:** After completing the registration, **My Document Source** displays showing EOB history with links to **view** and **download** PDF files for EOB statements for up to 36 months (three (3) years) of past beneficiary history.  **Account Features:**   * Additional documents such as Annual Notice of Change (ANOC), Formulary, Evidence of Coverage (EOC), Transition Fill letters, and Pharmacy Directory are also available for SilverScript and NEJE members. * “Quick access” most recent copy of documents. * Member can request a hard copy “Need a copy sent to you in the mail?” |
| **5** | a. There are additional methods to opt-in for paperless EOBs on Caremark.com. When signed in on Caremark.com, click Account **link** at the top of the page.  b. Select **Communication Preferences** from the dropdown. |
| **6** | On the Communication Preference page:   * Go to **Paperless Settings**,and click **Edit.** * Click to select **Show all available documents.** * Click to select **Explanation of Benefits** checkbox. * Select **Save Changes.** |

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| **Opt-Out of Electronic EOBs on Caremark.com** |

The CCR should perform the steps below:

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| **Step** | **Action** | |
| **1** | Do you have an account on Caremark.com? | |
| **If beneficiary says…** | **Then…** |
| Yes | Proceed to Step 2. |
| No | Proceed to Quick Registration Workflow. |
| **2** | You will need to sign in on **Caremark.com**. | |
| **3** | When signed in,click on **Account** at the top of the page. | |
| **4** | From the **Account link** page, click **Communication preferences** in the left menu. | |
| **5** | Advise the member to:   * Go to **Paperless Settings** and click **Edit.** * Click to select **Show all available documents.** * Click to select **Explanation of Benefits** checkbox. * Click **Save Changes.**     **Note:** The default print style is Normal; however, beneficiaries are able to change to Large Print or Braille from the Print Style drop down menu as needed. | |

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| **FAQs** |

Reference the table below:

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| **Question** | **Answer** |
| 1. **What are the benefits of switching to paperless EOBs?** | * With paperless Explanation of Benefits (eEOB) statements, you can access your information online at any time, rather than waiting to receive a paper version by mail. * You will receive an email as soon as a new EOB is ready to view. * Paperless EOBs help you stay organized and ensure your personal health information remains secure with no shredding necessary. * Up to 36 months of your EOBs are stored safely in a password-protected online account and organized by date so you can quickly find the statement you need. * You can access your statements at any time and print only those you need, which can reduce paper clutter. * Since your statements are online, you can access them anywhere – at the pharmacy, at your doctor’s office – even when travelling. |
| 1. **Can I view my EOBs online even if I am not a paperless beneficiary?** | Yes – any beneficiary with a Caremark.com account can view, print, or download up to 36 months of EOBs online. |
| 1. **Can I switch back to Paper Statements?** | Yes - You can switch back to receiving paper statements at any time by changing your profile in your Caremark.com account or calling Customer Care. |
| 1. **How will I know my EOB is available?** | * You will receive an email notifying you that a new EOB is available to view online. * If the email fails and CVS Caremark is notified of the failure, a paper copy email of your EOB will be mailed prior to the end of the month. |
| 1. **When will I be able to see my EOBs online once I sign up?** | * Up to 36 months of your EOB history has already been loaded into your Caremark.com account, and you can sign in and see those immediately. * New EOBs will typically be available by the 20th of each month after you use your coverage.   **Example:** Beneficiary fills a prescription in July. By August 20th, they should receive an email letting them know they have a new EOB available to view online. |
| 1. **Is this functionality available for the Caremark app or mobile site?** | Yes, you can also access your EOBs on the Caremark.com Mobile Site via your phone or other device; however, this feature is not available in the Caremark App at this time. |
| 1. **How far back can I go to obtain EOB statements?** | Beneficiaries can see up to 36 months of EOB history across Caremark PBM plans. |
| 1. **What if the eEOB functionality is not available when I sign in?** | I’ll need to submit a request to research this issue. The Web Support Team will be contacting you with a resolution. Are there any benefit issues I can assist you with?  **CCR Process Note:** Refer to   * [Caremark.com – Web Error Form Process (Internal) (041424)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a082ab2a-cbb5-4803-a27a-339f8c30cac9) * Caremark.com - Web Error Form Process (Vendor Teams Only) |
| 1. **Why do I have to provide my Email address?** | * Your email address will be used to send a notification when a new EOB is available to view online. * If we are unable to deliver an email to the address on record, you will still be able to access your EOB online, but you will also receive a printed copy in the mail. |
| 1. **I see a pop-up notice about electronic EOBs every time I sign in to my Caremark.com account. Is there any way to stop this from happening?** | * The pop-up is automated and designed to make it easier to choose paperless Explanation of Benefits statements, should you decide to switch in the future. * If you do not wish to choose paperless EOBs, simply click the **Not now** button, and the pop-up will disappear from the screen and will not be delayed again for 30 days or more. |
| 1. **If I opt out of electronic EOBs on the 19th of the month, do I still receive another electronic EOB on the 20th or is that opt out effective immediately and I’ll be sent a paper copy?** | * If you opt out of electronic EOBs on the 1st of the month you will still receive an electronic EOB for that month. * You will not be mailed a paper one until the next month’s mailing.   **Example:** You opt out on March 2nd, you will receive an eEOB for March and then receive a paper copy in the mail for April. |
| 1. **If it’s not immediate, how many days prior to the 20th would the I need to opt out of electronic EOBs in order to receive a paper copy in the mail for that month?** | * EOB statements and data are consolidated the first day of each month, for the previous month’s prescriptions. * Paper vs. eEOB preferences must be updated by the end of the month (30th or 31st) to be made in time for the following month.   **Example:** You change back to paper preference on January 31st, you will receive a paper EOB for February. |

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| Related Documents |

[MED D - Electronic EOBs (101602)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=eeb4b2b7-f5f0-471f-93ef-3c57939c5ae8)

**Parent Document:** [CALL 0045 Customer Care Web Support Email Response and Handling](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0045)

[CALL 0011 Authenticating Caller](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0011)

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

**Index:** [Caremark.com - Work Instruction/Job Aid Index (105672)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=8a2da44a-6336-454d-8deb-fca4a71ad69b)

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