# Compass - Identifying Paper Claims

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**Description:** Steps to identify Paper Claims in Compass to prevent unauthorized reversals of Paper Claims and to view Paper Claim Reimbursement & Financials.

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| Process |

A pharmacy or member may submit Universal(s) or Direct Claim form(s) to the PBM Paper Claim department for the reimbursement of medications that cannot be processed as an electronic claim.

* **Direct Member Reimbursement (DMR)** is a member/beneficiary paper claim form to request member payment for claims a pharmacy cannot submit electronically.
* **Universal Claim Form (UCF)** is a pharmacy paper claim form to request pharmacy payment for claims that cannot be submitted electronically.

**Only the Paper Claim department can process or reverse these claims.** PHD (Pharmacy Help Desk) / Customer Care should **never** reverse a paper claim.PHD can **only** assist with identifying a Paper Claim,for assistance with a PCL or Escalation warm transfer to the PHD Senior Team.



A pharmacy can request a Universal Claim Form (UCF) from Communiform at **1-800-564-8140.**

Perform the following steps to identify a paper claim:

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| **Step** | **Action** |
| **1** | Navigate to the **Claims Landing Page** and click the **Show Last** and expand the time out more, then click **Filter** icon to open the Filter options.  **Note:** If you do not change the show last to more than 90 days you may not get any results. |
| **2** | From the Claim Type drop-down menu, select **Paper.**    **Result:** Existing Paper Claims are displayed for the member. |

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| View Paper Claim Reimbursements & Financials |

A member or pharmacy may need to get information on paper claim reimbursements and financial information from submitted paper claims.

Perform the following steps to view paper claims reimbursements and financials:

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| **Step** | **Action** |
| **1** | On the **Claims** table, locate the paid paper claim and click the **Rx #** hyperlink.    **Result:** The Claim Details tab displays. |
| **2** | From the Claim Details tab, click **Financial Details**.    **Result:** The Financial Details tab displays. |
| **3** | Scroll down to the bottom of the Financial Details screen to view the **Member Reimbursement** panel.    The **Member Reimbursement** panel includes the following fields:   * Check Number * Check Amount * Date Cleared * Date Issued * Payee Name * Address * City * State * Zip Code * Country   **Note:** The Member reimbursement section will ONLY display if an actual reimbursement check has been sent out to the member. Otherwise, this section will not be visible on the Financial Details screen. |
| **4** | For additional details about the reimbursement, click the **Check Number** hyperlink.    **Result:** The Check Details popup displays. |
| **5** | Educate the member on their copay/co-insurance and deductible and how the claim paid.  **Notes:**   * Do **not** open a Support Task if the member is disputing their plan design regarding reimbursement. This is an opportunity to explain the Plan Design and how a Paper Claim is paid. * Refer to [Paper Claim Calculations (059749)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b470d4d1-008b-4fb2-a06c-ca8d2ff89195) to understand the difference between Submitted and Contracted Rates. |

** TAT (Turn Around Time):** Allow 10 business days for claim to arrive in the mail. Allow up to 30 days for the claim to process. If the claim is processed and a reimbursement check is not received within the TAT, refer to [Compass - Refund Stop Payment Check Reissue (061420)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f6f8404c-3eff-42f0-82d5-ffe3b5fa1b5f).

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| Search for Paper Claim Reimbursement (For Specific Clients Only) |

Perform the following steps to search for paper claim reimbursement and financials by Check number.

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| **Step** | **Action** |
| **1** | On the Member Snapshot Landing Page, navigate to the **Quick Actions** panel and click **Reimbursement Search**.  The Reimbursement Searchhyperlink only displays specific clients. If it does not display, do not use this section to search for the Paper Claim.    **Result:**  Reimbursement Search popup displays. |
| **2** | In the **Check Number** field, type the check number provided by the caller, then click **Search**. |
| **3** | Review the Search Results.   * If the check number entered is found, the Check Details popup displays.      * If check number entered is not found, the following message displays in the Reimbursement Searchpopup: “No check numbers match your search criteria.”     **Note:** Verify the check number that was entered is correct before advising the caller. |

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| Paper Claim Viewer |

**Note:** This may be helping to identify what information was missing or from the member’s Paper Claim request.  
For Caremark refer to [Compass - Paper Claim Submission Job Aid (058275)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ef66046d-494d-4892-9e2a-5bc437966f95) for more information.

 For Aetna, refer to [Aetna Compass - Researching / Submitting Paper Claims for Direct Member Reimbursement (DMR) (064166)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=27ce11fb-00ec-4abc-93a0-afb240e0862a) for more information.

To view what the member submitted, perform the following steps:

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| **Step** | **Action** | | |
| **1** | From the **Quick Action** panel on the Claims Landing Page, click the **Paper Claim Viewer** hyperlink.    **Result:** Medforce screen displays. | | |
| **2** | Review the information displayed on the Medforce screen.    **Note:** To narrow results, the following fields can be adjusted:   * **Age from Received:**  Drop-down list of options (Days from the date the claim was received)   + Blank   + 1-3 days   + 4-6 days   + 7-10 days   + 11-14 days   + 15 or more days * **Age from Completed:**  Drop-down list of options (Days from the date when claim was completed)   + 1-30 days   + 31-45 days   + 46-60 days   + 61-90 days   + Greater than 90 days * **Claim Status:**  Drop-down list of options (Received, In Process, QA, Other, Completed)   + Received   + In Process   + QA   + Other   + Completed * **Filter:**  Input any information found in the fields below, such as the Image number. | | |
| **3** | Select the **Document** icon (lower right side of screen).   * If you are unable to locate the paper claim member is calling about, refer to the [Scenario Guide](#_Scenario_Guide).       **Result:**  Displays the Coversheet and anything else the member sent to us.    Use the following buttons to navigate:   Navigates to the first page of the claim   Navigates one-page back.   Navigates one-page forward.   Navigates to the last page of the claim.    **Example:**  Other page examples that were included in the paper claim request: | | |
| **4** | Select the **Form** icon (lower right side of screen).    **Result:**  The member’s Overview Details screen. | | |
| **5** | After reviewing the Paper Claim information available from both the **Document** and **Form** icons, proceed as follows:  **Notes:**   * The member can call Customer Care and submit a task to follow up on missing or incorrect information. * When you are finished utilizing the Paper Claim Viewer, close manually.   **Turn Around Time (TAT):**   * For Caremark, refer to [Compass - Paper Claim Submission Job Aid (058275)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ef66046d-494d-4892-9e2a-5bc437966f95) for more information. * For Aetna, refer to [Aetna Compass - Researching / Submitting Paper Claims for Direct Member Reimbursement (DMR) (064166)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=27ce11fb-00ec-4abc-93a0-afb240e0862a) for more information. | | |
| **If...** | **Then...** | |
| Member submitted the correct information according to Medforce but claim status is rejected | Advise member of the reason for the rejected claim. | |
| Claim is rejected for missing information (MI) | Ask the member if they have the missing information available. | |
| **If…** | **Then…** |
| Yes | Open a Claims Research Request Support Task to send the information to the Paper Claims team and request to reprocess:  **Task Type:** Participant Research Request (CRR)  **Complete Required fields:**   * Claim/Document Number * Claim Submitted Date * Prescription Number * Fill Date * Days Since Claim Submitted * Reason * Is the Claim viewable in Compass? (dropdown)   **Notes:** Include missing information in the task notes.  Refer to [Compass - Create a Support Task (050031)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6) as needed.  If a callback is requested, after the Support Task is submitted, click the **Create Callback** button in the top right corner.    **Turnaround Time:** Advise the member that a decision is made within four (4) business days. |
| No | Advise the member how/where to obtain missing information and options to either resubmit the claim or to call and provide missing information when obtained. |
| Member did not submit the correct information according to Medforce. | Notify the members what they need and have them resubmit their request.  Follow the process outlined in [Compass - Paper Claim Submission Job Aid (058275)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=ef66046d-494d-4892-9e2a-5bc437966f95).  **Note:** When resubmitting a paper claim. The member’s new paper claim request is linked to their previous paper claim request/previous documents. | |
| There is an error in the claim according to Medforce. | Open a Claims Research Request Support Task to correct the issue (rather than having the member completely resubmit the claim). | |

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| Scenario Guide |

Refer to the following scenario as needed:

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| **Scenario** | **Action** | |
| Unable to locate the paper claim member is calling about | Ask member additional questions as to when and where a claim was mailed/submitted to ensure enough time has elapsed for the claim to be processed. | |
| **If…** | **Then…** |
| The Paper Claim is not found in Paper Claim Viewer, determine how long it has been since the member mailed it: | * **If there are 10 or less calendar days,** educate the member that it can take up to 10 calendar days for us to receive the claim. * **It is more than 10 calendar days,** ask the member to resubmit the Paper Claim request. Recommend the Digital option first. |
| A digital claim is not found, ask the member if they have a confirmation number (starts with D). If yes,  **Note:** Digital Paper Claims are displayed in the Paper Claim Viewer once received. | Submit a Claims Research Request Support Task:  **Task Type:** Participant Research Request (CRR)  **Complete Required fields:**   * Claim/Document Number * Claim Submitted Date * Prescription Number * Fill Date * Days Since Claim Submitted * Reason * Is the Claim viewable in Compass? (dropdown)   **Note:** Include any additional information.   * + If a callback is requested, after the Support Task is submitted, click the **Create Callback** button in the top right corner.     Refer to [Compass - Create a Support Task (050031)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6) for additional information as needed.  **Turnaround Time (TAT):** Advise member that a decision will be made within four (4) business days. |
| Claim shows a refund but no check information displays. | Open a Support Task  **Task Type:** Participant Research Request (CRR)  **Complete Required fields:**   * Claim/Document Number * Claim Submitted Date * Prescription Number * Fill Date * Days Since Claim Submitted * Reason * Is the Claim viewable in Compass? (from the dropdown menu)   **Notes:** Include any missing information in the task notes.  Refer to [Compass - Create a Support Task (050031)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6). | |
| Refund amount appears to be incorrect/inaccurate | Attempt to verify if there was an error with the refund amount by utilizing [Paper Claim Calculations (059749)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b470d4d1-008b-4fb2-a06c-ca8d2ff89195) work instruction.   * If the amount is incorrect, or member insists it is inaccurate, contact the [Senior Team (057524)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7653e7c2-1a97-42a0-8a81-6267c72e1ca9) for assistance. | |

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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)

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

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