# Compass - Using Universal IDs for Test Claims

[Process](#_Toc205821018)

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**Description:** Guideline for locating universal identification numbers (UIDs), the numbers used to run test claims to compare pricing for a new plan year.

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| Process |

Perform the steps below to locate the UID for a plan:

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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)   **Note:** Future Lines of eligibility will show as Inactive. Click **Open** to view Carrier ID.  A screenshot of a computer  AI-generated content may be incorrect.  **Result:**The Search Results section on the Search by Member screen will display with the **Inactive** radio button selected. | |
| **2** | 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.     A screenshot of a computer  AI-generated content may be incorrect. | |
| **If…** | **Then…** |
| Member found | The Search Results window displays.  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.      3. Use the Client and Processing Information Panel of the **Member Snapshot** to access CIF.  A screenshot of a computer  AI-generated content may be incorrect.  4. Click on the appropriate profile to highlight then click **Select**.  5. Skip to step 3 and proceed. |
| No Members Found  A red rectangular sign with white text  AI-generated content may be incorrect. | Ask Probing questions about the member’s eligibility and use the Carrier Search function in Compass to locate Carrier ID  1. Click the **Magnifying glass**search button to initiate the search.    A white rectangular object with black border  AI-generated content may be incorrect.    **Result:**Find a Client screen displays.    A screenshot of a login box  AI-generated content may be incorrect.    2. Complete the **Client Name** field, then click **Find**.    **Result:**Client Search Results display.    3. 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.    A screenshot of a computer  AI-generated content may be incorrect.    **Result:**Agent will be redirected back to the Search by Member screen, where the Carrier Code will be prepopulated in the **Carrier Code** field.   * If the member is NEW to the client and therefore does not already have an active account with Caremark, move to step 4.   A screenshot of a computer  AI-generated content may be incorrect. |
| **3** | Locate the **Carrier ID** on the Client and Processing Information Panel of **Member Snapshot**.  **Example:** 23XX is the Client ID.  A screenshot of a computer  AI-generated content may be incorrect. | |
| **4** | a. Search for the CIF (Client Information Form) using the Carrier Code in theSource.  b. Open and expand the **Open Enrollment** section of the CIF plan’s page in theSource.  c. Scroll down the screen to locate the Universal ID’s.    A screenshot of a computer  AI-generated content may be incorrect.  **Note:** Not all Clients have opted into having UIDs available. Utilize the CIF to assist the member to the best of your ability. Advise the members they may also speak to their benefits office for additional information about the available plans. Apologize for the inconvenience. | |
| **5** | 1. Copy the UID matching the group for the inquiry.   b. Paste the UID in the Member ID section in Compass to search for the test account. If you have an Interaction Case open for the member, open the Test Account as a Research Case. Otherwise, please open the Test Account as an Interaction Case.  A screenshot of a computer screen  AI-generated content may be incorrect.  **Note:** If the member does not know which plan they are interested in, advise them that we need to know which plan they are wanting information on to pull up the correct test account. This is to ensure the information we provide is accurate. | |
| **6** | Perform a Test Claim function in Compass, using a date in the new plan year as the Fill Date. Refer to [Compass - Test Claims (050041)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=60c20ea0-1d07-46e3-809a-b54734b80fbe).  **Plans that are inactive and have a future line of eligibility will require you to perform test claims to determine if a pharmacy is in network.**  A screenshot of a computer  AI-generated content may be incorrect.  **Notes:**   * A maximum of 20 prescriptions can be included in a Test Claim at one time. * If the test account for the UID is inactive you can continue with the test claim. | |
| **7** | Click the respective hyperlinks for the details of the claim to view the benefit information, rejection reasons, & copay amounts.    Advise the member of the disclaimer at the top of the screen:  Please note the prices quoted are estimates and may not reflect your actual out of pocket costs. | |

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| Related Documents |

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

**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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