# Compass – Adding a Provider to Submitted Support Task

[Creating a Support Task from an Existing Claim](#_Toc193974718)

[Creating a Support Task without an Existing Claim](#_Toc193974719)

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**Description:** **Steps for adding provider information when it is needed in a Support Task, ensuring that Support Tasks are submitted accurately.**

**Note:** Not all Provider Contact Support Task will include the Provider Search option when the Support Task is submitted.

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| Creating a Support Task from an Existing Claim |

If Provider contact is needed and a Support Task is required, complete the following steps.

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| **Step** | **Action** | |
| **1** | From the Claims Landing Page, on the Claims tab, locate and click the **Provider** hyperlink associated with the claim.    **Result:** The Provider Details pop up displays. | |
| **2** | Confirm with the caller and notate the correct provider information listed (phone and fax).    **Note:** The NPI can be copied from the **Provider Details** pop-up or from the **Row Level Action** of the claim.   If the caller states the information listed is incorrect, obtain the correct Provider information from them and continue to the next step. | |
| **3** | Click **Create Support Task** from an existing claim on the Claims table. Refer to [Compass – Create a Support Task (050031)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6) for the ways to initiate the Support Task from the claim.   The provider’s information does not populate until the Support Task type is selected.    **Notes:**   * There may be scenarios where the provider’s information does not populate, refer to notes below. * If no provider information populates, enter the Provider ID (NPI) if the task has the Provider ID field. * Provider information that is needed for a Support Task may be different depending on the task being submitted. | |
| **4** | Complete all required fields and include necessary notes needed for the Support Task, click **Save.**  If a Support Task is being created for Contact Provider for PA or Contact Provider for Exception because ePA is down or not working, include this in your notes.     If the contact information listed for the provider is incorrect or missing, document the information the caller states is correct in the Support Task Notes. Click Save in the Support Task and proceed to [Step 10](#Step10).  **Result:** The Support Task Detail tab populates. | |
| **5** | Navigate down to the **Provider Details** section.    **Provider Details section**     If the information entered for the Provider in the Support Task Returns multiple lines of provider information, the following pop-up displays:     * If a note was added with the provider’s information or the caller has the provided this information, click the **Search Providers** button, and proceed to [Step 8](#Step8). * If a note was not made to include the Provider’s information, close the pop-up then continue to navigate to the **Provider Details** section, and proceed to [Step 6](#Step6). | |
| **6** | In the **Provider Details** section, confirm with the caller the correct fax number for the provider. | |
| **If…** | **Then…** |
| One line of provider information is listed in the Provider Details | Confirm with the caller that the line of Provider information is correct.     * If the line of provider information is correct, continue to [Step 10](#Step10). |
| Multiple lines of provider information are listed in the Provider Details | Copy the ID (NPI) and continue to [Step 7.](#Step7) |
| No provider information populated  **or**  Is incorrect and the caller states that they have provider’s information | * Navigate to **the Notes** panel of the Support Task. * Click the **Row Level Action** in the **Notes** panel and click **New.** * Enter notes in the Provider Detail section to indicate that it is either missing or incorrect and then enter the correct provider’s information (provider name, phone, and fax) in the **Notes** panel. * When complete, click **Done**. Proceed to [Step 10](#Step10). |
| **7** | Click the Provider Search button.    **Result:** Search for Provider pop up displays | |
| **8** | Enter the Provider search information.  **Note:** Users can search by the following:  Provider **NPI** (National Provider Identifier) or First Name, Last Name, and Zip Code or First Name, Last Name, City, and State.    Complete the Search fields and then click **Find** to search for the provider.  **Result:** Provider Search Results populate. | |
| **9** | Verify with the caller the correct fax number of the provider. Once verified, click the **Fax** **Number** hyperlink.    **Result:** The Provider is added to the Provider Details section. | |
| **10** | Close the Support Task Details tab. | |

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| Creating a Support Task without an Existing Claim |

If Provider contact is needed and a Support Task is required, complete the following steps.

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| **Step** | **Action** |
| **1** | Before submitting the Support Task, review the Claims table to try and locate a previous claim for the applicable provider to obtain the provider’s information.   * If locate the previous claim, make note of the following provider’s information (Provider Name, provider phone number, and provider fax number) and continue to [Step 2.](#CASTStep2) * If unable to locate a previous claim, continue to [Step 2](#CASTStep2).    Best practice, if possible. Obtain and complete the Provider ID (NPI) field in the Support Task due to the provider’s information automatically populating in the Provider Details section when the Support Task is submitted.   * If an existing claim is found, the NPI can be copied from the **Provider Details** pop-up or from the **Row Level Action** of the claim. |
| **2** | Click the **Create Support Task** button on the Case Details panel.    **Result:** New Support Task creation screen displays.   * If the provider’s information is able to be obtained, enter the information in the Provider Name and Provider ID (NPI) fields.      * If provider information was not obtained or the caller states the provider information is incorrect, continue to [Step 3](#CastStep4). |
| **3** | Complete all required fields and any necessary notes required for the Support Task, click **Save.**   * If the caller states the information, we have listed for the provider is incorrect and the caller has the correct provider information, document the information the caller has in the Support Task Notes, (Provider Name, provider phone number, and provider fax number). * If the provider’s information was not obtained or the caller does not have the correct provider’s information, continue to the next step.     **Result:** The Support Task Detail tab populates. |
| **4** | Click the **Provider Search** button.  **Note:** Not all Provider contact Support Task will have the Provider Search button. If the Provider Search button is missing and a Providers needs to be added to a Support Task enter the provider information in the Notes panel in the Support Task. Refer to [Step 6 in the Creating a Support Task from an Existing Claim](#CASTFECStep6) section.    **Result**: Search for Provider pop up displays. |
| **5** | 1. Enter Provider search information.   **Note:** Users can search by the following:  Provider **NPI** (National Provider Identifier) or First Name, Last Name, and Zip Code or First Name, Last Name, City, and State.     1. Complete the Search fields and then click **Find** to search for the provider.   **Result:** Provider Search Results populates. |
| **6** | Verify with the caller the correct fax number of the provider. Once verified, click the Fax **Number** hyperlink.     If the lines of the provider’s information listed are incorrect and the caller has the providers information, enter the provider information in the Notes panel in the Support Task. Refer to [Step 6 in the Creating a Support Task from an Existing Claim](#CASTFECStep6) section.  **Result:** The Provider is added to the Provider Details section. |
| **7** | Close the Support Task Details tab. |

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| Related Documents |

[Customer Care Abbreviations and Definitions 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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