# Compass MED D - Blue MedicareRx (NEJE) - Resolution of Eligibility

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**Description:** This document provides the process for verifying the beneficiary’s eligibility.

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| General Information |

When a beneficiary contacts Customer Care for any issue, the Med D Customer Care Representative (CCR) should always verify the beneficiary’s eligibility and determine the correct designated team to address the caller’s request.

Occasionally when attempting to locate the beneficiary’s account, the CCR will have difficulty in locating the account.

**BEFORE** telling the beneficiary they are **NOT** eligible, the CCR should utilize **ALL** of their resources in researching the beneficiary’s eligibility.

* **Compass**
* **FAZAL**
* **Marx**
* **The Senior Team**

**Note:** If a Benefits Office is calling to update a beneficiary’s eligibility, warm transfer to the Senior Team. Refer to [Compass MED D - When to Transfer Calls to the Senior Team](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7).

Additionally, CCRs may receive inquiries from a beneficiary with more than one type of benefit plan. This is referred to as Single Transaction Coordination of Benefits **(STCOB)**.

The CCR should utilize the CIF to determine if the beneficiary is a part of an STCOB EGWP client, and the [Compass MED D - Single Transaction Coordination of Benefits (STCOB) Tips and Reminders](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0fbc5a42-3f00-4fdd-9ebc-e5f65abead72) job aid to research claims in **Compass**.

* Refer to the [Troubleshooting](#_Troubleshooting) section of this document.

 The CCR should be diligent in their research to try and assist the beneficiary. However, there will be instances when the call will need to be warm transferred to the designated care team or Senior Team. Refer to [Compass MED D - When to Transfer Calls to the Senior Team](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7).

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| Search for the Beneficiary’s Eligibility |

When searching for a beneficiary’s eligibility, the CCR may have to search through multiple systems to find details on the beneficiary. The diagram below represents the path the CCR would follow to search, navigating from one system to the next until a result is found.

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| **Compass Member Search** | [**Compass Medicare D System Button Search**](#Step3) | [**Search in FAZAL**](#Step4) | [**Search in Enrollment Portal**](#Step5) | [**Search in MARx**](#Step6) |

In order to begin the process for verifying the beneficiary’s eligibility, the CCR will always begin in **Compass** and perform the following steps:

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| **Step** | **Action** | | | | |
| **1** | **Search in** **Compass** for an active line of eligibility for the beneficiary’s account.   * Refer to the [Compass - Member Search](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44e71d7a-1b1c-4931-9089-d4161a72d114)work instruction.   **Result:** If an active line of eligibility is located/selected, Guided Authentication will be initiated, refer to [Compass - Guided Caller Authentication](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=80476f74-7dca-4548-bf35-185ca8d45c13) as needed. | | | | |
| **If…** | **Then…** | | | |
| Eligibility found for the beneficiary | * Open an Interaction Case. * Proceed with answering the beneficiary’s questions. * If applicable transfer the beneficiary to the designated care team to address their issue. | | | |
| Future Eligibility found | Advise the beneficiary that their eligibility has been found on file, but that it has a future effective date of MM/DD/YYYY.  **DO NOT TELL THE BENEFICIARY THEY ARE NOT ELIGIBLE!**  Answer any drug coverage inquiries.  Refer to the following document:   * [Compass MED D - Test Claim Index](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a6497a55-a1b1-4244-af87-830de001e621) * If applicable transfer the beneficiary to the designated care team to address their issue.   **Note:** A banner will display on the Member Snapshot, Claims Landing Page, and Case Landing Page with the following message, to clearly indicate the member’s eligibility is future active: “Future eligibility period. No mail benefits available.” | | | |
| No Eligibility record found for beneficiary | **DO NOT TELL THE BENEFICIARY THEY ARE NOT ELIGIBLE!**  Proceed to Step 2. | | | |
| No active Eligibility record found for beneficiary for a specified client | **DO NOT TELL THE BENEFICIARY THEY ARE NOT ELIGIBLE!**  Refer to the **Eligibility** section of the CIF.  If no specific client process is listed in the CIF, proceed to Step 2. | | | |
| Text popup displays on the screen when searching for a beneficiary | Search returns error: DO NOT READ TO THE MEMBER.  This is CCR information only.    I apologize but your benefits are not serviced by us. Please call the Customer Care number listed on the back of your ID card.  **Note:** If the beneficiary does not have an ID Card, advise them to contact their medical carrier or Human Resources department.  Do not transfer these calls or attempt to further help the caller. | | | |
| **2** | Locate the beneficiary by performing a search in the **Medicare D System** from the **Search (New UI)** tab. Refer to [Compass - Member Search](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44e71d7a-1b1c-4931-9089-d4161a72d114) and [Compass Med D - Medicare D System Member Search and Guided Authentication (Member in FACETs, not RxClaim).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1ec886dd-639f-45cd-b758-43211e09121c) | | | | |
| **3** | Attempt to locate the beneficiary in **FAZAL**.  Refer to the[MED D Enrollment - FAZAL](../../Documents/Business%20Hours%20Documents/CMS-PRD1-078799)work instruction.  **CCR Process Note:**  Search for the beneficiary via:   * Name * DOB * MBI | | | | |
| **If the beneficiary is…** | **Then the CCR will…** | | | |
| Found in **FAZAL** | Verify if the enrollment is complete.  **Note:** Any issues which may have held up the beneficiary’s enrollment will show in **FAZAL** as highlighted in PINK. | | | |
| **If the enrollment is…** | | **Then…** | |
| Complete | | **Proceed to the next step.** | |
| **NOT** complete | | Refer to the [Compass MED D Enrollment - Incomplete Enrollments (ICE) or Enrollments with Missing Information](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c31eec52-fb25-4867-9693-4b5129d67190) work instruction.  **Stop:**  If the beneficiary says they do not have medications or need medications right away or otherwise is escalating due to their enrollment not being in the system, **immediately** warm transfer to the Senior Team. Refer to [Compass MED D - When to Transfer Calls to the Senior Team](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7).  Proceed to [Step 5](#Step7). | |
| **NOT** Found in **FAZAL** | Proceed to [Step 4](#Step5). | | | |
| **4** | Attempt to locate the beneficiary in the [Compass MED D - Blue MedicareRx (NEJE) - Enrollment Portal](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=da34f1cb-7925-4d56-8a30-5fc0738b4edd). | | | | |
| **If...** | | **Then...** | | |
| Found | | Warm transfer to the Senior Team. Refer to [Compass MED D - When to Transfer Calls to the Senior Team](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7). | | |
| Not Found | | Proceed to [Step 5](#Step6). | | |
| **5** | Attempt to locate the beneficiary in **MARx**. | | | | |
| **If the beneficiary is…** | **Then…** | | | |
| Found in **MARx** with an enrollment in Blue MedicareRx | How many days’ supply do you have on hand? | | | |
| **If the beneficiary has…** | | | **Then…** |
| 5-day supply or greater on hand | | | Submit a **Support Task** in Compass:  **Task Type:** Enrollment Not Found  **Note:**Fields containing an asterisk (\*) are required.  **Notes: Include the following:**   * Document that enrollment was found in MARx * Beneficiary Name * DOB * MBI * Contact Number * TAT- A member of our enrollment team will be calling you within 4 business days.   Refer to the [Compass MED D - SilverScript and Blue MedicareRx (NEJE) - Enrollment Related Support Tasks](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=39a75bb6-425d-4eb7-a436-036f5da9d31a).  **Stop:**  If the beneficiary says they do not have medications or need medications right away or otherwise is escalating due to their enrollment not being in the system, **immediately** warm transfer to the Senior Team. Refer to the [Compass MED D - When to Transfer Calls to the Senior Team](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7).  Proceed to [Step 6](#Step7). |
| Less than a 5-day supply on hand  **Qualifies as an URGENT Issue** | | | Submit a **Support Task** in Compass and mark as **URGENT**:  **Task Type:** Enrollment Not Found  **Note:**Fields containing an asterisk (\*) are required.  **Notes: Include the following:**   * Document that enrollment was found in MARx. * Beneficiary Name * DOB * MBI * Contact Number * TAT - A member of our enrollment team will be calling you within 4 business days.   Refer to the [Compass MED D - SilverScript and Blue MedicareRx (NEJE) - Enrollment Related Support Tasks.](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=39a75bb6-425d-4eb7-a436-036f5da9d31a)    **Stop:**  If the beneficiary says they do not have medications or need medications right away or otherwise is escalating due to their enrollment not being in the system, **immediately** warm transfer to the Senior Team. Refer to [Compass MED D - When to Transfer Calls to the Senior Team](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7).  Proceed to [Step 6](#Step7). |
| Found in **MARx** with an enrollment in another plan | If a Non-Blue MedicareRx (S2893) Contract ID is displayed, advise the beneficiary:     * I see that you are enrolled in another plan starting on <date>. You may contact Medicare about information on that specific plan. * If you would like to contact Medicare, you can call:   **1-800-MEDICARE (1-800-633-4227), 24 hours a day, 7 days a week**  TTY users call: **1-877-486-2048**  **Instruct the beneficiary to ask for an Enrollment agent.**  **Note:** If the caller agrees, cold Transfer him/her to Medicare. | | | |
| **NOT** found in **MARx** with an enrollment in any plan | I am sorry I do not see that you have an active enrollment. I can submit an enrollment request on your behalf, would you like me to complete that request?  In addition to submitting an enrollment, submit a **Support Task** in Compass and mark as **URGENT**:  **Task Type:** Enrollment **-** Enrollment Not Found  **Notes: Include the following:**   * Document that enrollment was not found in MARx. * Beneficiary Name * DOB * MBI * Contact Number   Refer to the [Compass MED D - SilverScript and Blue MedicareRx (NEJE) - Enrollment Related Support Tasks](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=39a75bb6-425d-4eb7-a436-036f5da9d31a)  **Stop:**  If the beneficiary says they do not have medications or need medications right away or otherwise is escalating due to their enrollment not being in the system, **immediately** warm transfer the Senior Team. Refer to [Compass MED D - When to Transfer Calls to the Senior Team](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7).  Proceed to [Step 6](#Step7). | | | |
| **6** | I have submitted a request to have your information updated. | | | | |
| **For Beneficiaries with…** | **Then…** | | | |
| **5 days supply or greater** of medication on hand | A member of our enrollment team will be calling you within **72 hours**. | | | |
| **Less than 5 days supply**of medication on hand | A member of our enrollment team will be calling you within **1 business day**. | | | |
| **If the Senior CCR was…** | | **Then…** | |
| Able to build an Eligibility Record | | The beneficiary will be able to obtain their medication immediately. | |
| **NOT** able to build an Eligibility Record | | A member of our enrollment team will be calling you within **1 business day**.  Proceed to the next step. | |
| **6** | Create a Support Task outside of a member account by performing the following steps:   * From the **Search by Member** screen, **Search by Retail Rx** screen or **Search by Mail Order/Internal ID** screen, click the **Support Task Actions** dropdown. * Select “Create Med D Enrollment Support Task”. * Select the appropriate Task Type for the issue (see table below).   **Example:** This Support Task can be created on the **Search by Member** screen (outside of an Interaction or Research Case.)  Within the **Support Task Actions** dropdown, an Information Icon **(i)** will display the following message: “Only create a support task when a member record cannot be located in Compass after exhausting all search options, or if you get a CVSID error while in a member record and are unable to create a support while in that case.” | | | | |
| **If…** | **Then…** | | | |
| No Member on file | Create the following Support Task:  **Task Type:** Enrollment - Enrollment Not Found  Complete all required and applicable fields in task. | | | |
| CVSID Error | Create the following Support Task:  **Task Type:** Enrollment - Enrollment/Eligibility Discrepancy  Complete all required and applicable fields in task. | | | |
| Pre-Enrollment Information Missing or Incomplete | Create the following Support Task:  **Task Type:** Enrollment - Missing Pre-Enrollment Information – RFI  Complete all required and applicable fields in task. | | | |
| **7** | Ask if there are any other benefit issues. | | | | |
| **If…** | **Then…** | | | |
| Yes | * Address any benefit issues. * Document and close the call using current policies and procedures.   + Refer to the [Compass - Call Documentation](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0296717e-6df6-4184-b337-13abcd4b070b) and [Compass MED D - Call Documentation Job Aid](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=433711aa-8fa6-447c-872b-bd69cd6cd7c0).   **Resolution Time:**   * When active eligibility is found, information = Immediate * For CIF scenarios requiring an Task to be submitted = 72 hours. * For scenarios requiring a Route to be submitted = 4 business days. | | | |
| No | Document and close the call using current policies and procedures.   * + Refer to the [Compass - Call Documentation](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0296717e-6df6-4184-b337-13abcd4b070b) and [Compass MED D - Call Documentation Job Aid](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=433711aa-8fa6-447c-872b-bd69cd6cd7c0).   **Resolution Time:**   * When active eligibility is found, information = Immediate * For CIF scenarios requiring an RM Task to be submitted = 72 hours. * For scenarios requiring a Route to be submitted = 4 business days. | | | |

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| Senior Team |

Once all of the research steps in the [Search for the Beneficiary’s Eligibility](#_Search_for_the)section of this document have been completed, there may be instances where the CCR will need to warm transfer to the Senior Team. Refer to [Compass MED D - When to Transfer Calls to the Senior Team](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7).

The Senior CCR will verify the CCR has searched **ALL** systems following [Search for the Beneficiary’s Eligibility](#_Search_for_the).

The Senior CCR will utilize the information obtained from the CCR to assist in resolving the issue.

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| Troubleshooting |

Utilize as appropriate:

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| **Situation** | **Resolution** | |
| Allow Claim Types blank or Mail Pharmacy Address blank or listed as unknown. | **RxClaim:** If beneficiary wants refills at the pharmacy right away, warm transfer to the Senior Team.  Refer to [Compass MED D - When to Transfer Calls to the Senior Team](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7). | |
| Claims rejecting for secondary coverage  i.e. Alternate insurance flag | Review the CIF in order to determine if Blue MedicareRx handles the client’s eligibility. | |
| **If …** | **Then…** |
| Handles the client’s eligibility | Warm transfer to the Senior Team.  Refer to [Compass MED D - When to Transfer Calls to the Senior Team](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7). |
| **DOES NOT** handle the client’s eligibility | Follow the directions provided in the CIF in the eligibility section. |
| Incorrect information found on the account (all platforms) | Review the CIF in order to determine if BlueMedicareRx handles the client’s eligibility. | |
| **If …** | **Then…** |
| Handles the client’s eligibility | Warm transfer to the Senior Team.  Refer to [Compass MED D - When to Transfer Calls to the Senior Team](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7). |
| **DOES NOT** handle the client’s eligibility | Follow the directions provided in the CIF in the eligibility section. |
| EGWP STCOB Broken Links | * Review the CIF to determine if it is an EGWP STCOB Client. * Refer to the [Compass MED D - Single Transaction Coordination of Benefits (STCOB) Tips and Reminders](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0fbc5a42-3f00-4fdd-9ebc-e5f65abead72) job aid. * Refer to the [Senior Team](#_Senior_Team)section of this document. | |

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| Related Documents |

* Refer to the “Grievance Standard Verbiage (for use in Discussion with Beneficiary)” section in the appropriate work instruction linked to from [Compass MED D - Grievances Index](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=70034f51-77df-49a4-ae97-7d3d63b216b3).

* [Universal Medicare D - Consultative Call Flow (CCF) Process](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=c954b131-7884-494c-b4bb-dfc12fdc846f)

**Parent SOP:** CALL-0048: [Medicare Part D Customer Care Call Center Requirements-CVS Caremark Part D Services, L.L.C.](https://policy.corp.cvscaremark.com/pnp/faces/SecureDocRenderer?documentId=CALL-0048&uid=pnpdev1)

**Abbreviations/Definitions:** [Abbreviations / Definitions](../../Documents/Business%20Hours%20Documents/CMS-2-017428)

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