**Using Universal IDs for Test Claims in PeopleSafe**

[Process](#_Various_Work_Instructions)

[Related Documents](#_Toc179900494)

**Description:** Provides a 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** | Follow the steps below: | |
| **Step** | **Action** |
| **1** | Search, find, and view the patient’s profile in PeopleSafe by accessing the main screen and search for the member using their name and date of birth.   * Specialty Pharmacy should refer to [Specialty PeopleSafe Overview for PSR](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5d2b5483-f6de-41f2-b39f-c8d9bef6bba8) for more information .   **Notes:**   * When both last name and first name are entered on the main screen followed by an asterisk (\*) an automatic wild card search will be performed. * This helps locate accounts with name spellings and/or honorifics such as Jr. or Sr. after the name. * All Steps must be performed using Microsoft Edge. * The Primary Search (Plan member ID or Internal ID) and Secondary/Unique Searches are only used if the account cannot be located initially with name and date of birth search.   **Example of a Good Search**: |
| **2** | Verify all patient details match what we have listed in SPRx:   * Patient Name * Date of Birth * Address * Phone Number |
| **3** | Select from the list of members that display (bottom of screen).  **Note:** If there are two or more profiles, review:   * The client code. * The PBM field * The effective date and expiration date |
| **4** | Click on the appropriate profile to highlight then click **Select**. |
| **2** | The **Client ID** can be used to initiate a search in theSource and is located on the top left of main screen of PeopleSafe, after accessing the profile.  **Example:** **X63XX** is the Client ID. | |
| **3** | Show the **Open Enrollment** section of the plan’s page on theSource.    Follow the steps below: | |
| **Step** | **Action** |
| **1** | Search the **Client ID** on theSource. |
| **2** | Select the **Client** filter. |
| **3** | The CIF for the client is shown. |
| **4** | Select the client’s CIF to open the **Main Information** screen. |
| **5** | Expand the **Open Enrollment** section.    **Result:** The list of available UIDs displays. |
| **4** | Select the UID that matches the group the member is inquiring about.  UIDs can show as termed (non-active eligibility dates) and still work providing accurate test claims. | |
| **5** | Use the Test Claim function in PeopleSafe, using a date in the new plan year as the Fill Date.   * Specialty Pharmacy should refer to [Specialty PeopleSafe Overview for PSR](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=5d2b5483-f6de-41f2-b39f-c8d9bef6bba8) for more information. | |
| **6** | Expand the details of the claim to see benefit information.    **Result:** The test claim results display the copay information, as well as any further information provided by the plan.    It is **IMPORTANT** to advise the member of the disclaimer at the bottom of the screen:  Please note the prices quoted are estimates and may not reflect your actual out of pocket costs. | |

[Top of the Document](#_top)

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| Related Documents |

[Specialty PeopleSafe Overview for PSR](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=5d2b5483-f6de-41f2-b39f-c8d9bef6bba8)

**Parent Document:**  [SPO-0135 Scheduling and Processing Initial Orders and Refills](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=SPO-0135)

**Abbreviations/Definitions:**  [Specialty Pharmacy Abbreviations/Definitions](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=beaf0a3c-edb2-4455-9e53-d03ee40e7a4c)

[Top of the Document](#_top)

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