

Address Verification

Facilitator Guide



Acknowledgments

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Document Summary

This material is intended for Medicare LINET Inbound Contact Representatives. In this lesson, we'll review Address changes. Address changes **don't** require verification with the Centers for Medicare & Medicaid Services (CMS). You'll get an overview of how to complete an address verification every 90 days. We'll also identify temporary and permanent address changes using CMS Out-of-Service-Area (OSA) timeframes.

Learning Objectives

- Follow the business rules for verifying a member's demographics every 90 days
- Classify address changes as a temporary or permanent move based on government guidelines
- Differentiate Mailing and Residential addresses on CI PEDM screen and know the impact
- Understand when and how to use the Medicare Address Verification Form template (AVF)
- Create a task in Customer Interface (CI) PATR screen
- Process demographic changes on the **CI PEDM** screen for non-verified demographics:
 - Addresses and phone numbers

Program Timing

- 60 minutes:
 - 45 minutes of instruction
 - 15 minutes for review

Pre-work

- None

Required Supplemental Materials

- [LINET 209807-Address Verification and Temp Moves PPT-SPM](#)
- CI 203305-Create Manual Task in PATR-eMOD

Set-up

- None

Security Access Requirements

- Mentor/Compass
- Learning Center
- Customer Interface (CI) [HodMod app or HodMod Vendor through MyApps]

Prerequisites

- LINET 209806-Demographics Overview-MOD

FACILITATOR NOTE Open [LINET 209807-Address Verification and Temporary Moves PPT-SPM](#) and move to Slide 2.

Slide 2: Change of Address Overview

- It's so important to understand the impact that address changes have on members' coverage. This is one reason **why** we verify member addresses every 90 days. Understanding CMS rules and timeframes lets you give members the necessary guidance to be sure their health care coverage continues uninterrupted.

IMPORTANT NOTE:

For **Demographics**, your main document will be [LI NET Customer Service Member Demographic Changes Overview](#). All the information you need is within this document or links you to additional information and procedures.

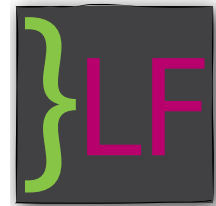
Slide 3: Authorized Callers

- Address changes are only accepted from authorized callers. Authenticated members and authorized power of attorneys (POA) can verify demographic information on file or request a change.

Reference Mentor:

[Power of Attorney Requests for Demographic Changes](#)

- Only the **Member** or **Power of Attorney (POA)** can make address changes
- If member is deceased, **Executor of Estate (EOE)** replaces a **Power of Attorney (POA)**
- If the member or **POA** is unavailable, refer to the [Incoming Calls for LI NET](#) document. Complete the necessary pre-work.



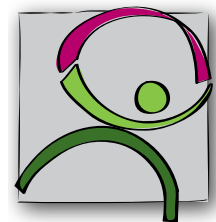
Facilitator Note



Say This



Important Note



Mentor

Slide 4: 90 Day Address Verification

- We must verify residential addresses and phone numbers every 90 days. Or, when a CRM **Contact Handling Alert** indicates information is needed (for example, the alert indicates: ***an invalid address is on file***). Humana verifies a member's address every 90 days to:
 - Be sure members receive important correspondence (*like: Explanations of Benefits (EOB), ID cards, SmartSummary statements, Bills*)
 - Allow the accurate and timely processing of claims
 - Correct any discrepancies Humana has on file
- In CRM, the last person who clicked the **Verify** button defines the time frame. Review the **Verified On/By** fields to determine the last time the member's demographics were verified. If it has been 90-days or longer, then they must be verified again.

CRM Person Account Screen



Verify Demographics	
Verify Verify Family	
Last Verified By	Last Verified On
SI D	Thu Aug 12 09:00:00 GMT 2021
Days Since Last Verified	
57	

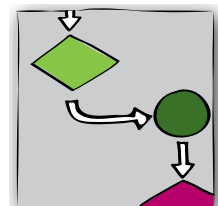
- We are only able to click the **Verify** button if a member has an existing LINET Policy in CRM.

SUMMARIZED PROCESS:

- Access the Member information in CRM to validate and authenticate the caller.
- Is the caller either the member or the Power of Attorney (POA)? If yes, determine if the member is enrolled in a LINET plan
- If the member is in a LINET plan, then verify the demographic information in CRM
- Is the demographic information correct? If yes, click the **Verify** button and the procedure is complete. (***See Important Note***)



Say This



Process

IMPORTANT NOTE: If the answer to any of the previous questions is NO, then the Mentor document instructs you on what to do.

Slide 5: When address doesn't match

- If a caller provides an address that doesn't match, then we must verify if the address is mailing or residential. We also must inquire about the best address to receive correspondence, if the address requires changing.

Reference Mentor:

[Updating LI NET Member Address and Telephone Number](#)

- We'll be reviewing this document a bit later.

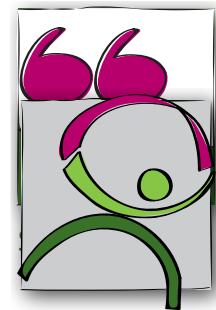
Slide 6: Mailing vs. Residential Addresses (definitions)

- Members have the option of having two addresses on file:
 - **Mailing:** address where member chooses to receive their mail
 - **Residential:** address where member physically lives
 - **Mailing/Residential** field displays in the Customer Interface (CI) PEDM screen when mail is received at residence. When the mailing address is different from where the member lives, then two different addresses will show.
- Follow inquiry/case documentation and closure procedures

Note: for CMS Verification items that have a discrepancy - Advise the member to reach out to SSA to have those elements corrected.

Slide 7: Navigate to CI PATR screen

- You can update a member's address and phone number in the Customer Interface (CI), without verifying what the CMS MARx system shows.
- Before making the changes, you must create a task in CI.
- Go to CI from the Hod Mod 4 icon on the desktop.



Mentor



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Slide 8: Mentor

[Creating a Work Task on the PATR Screen](#)

Slide 9: 3 Steps

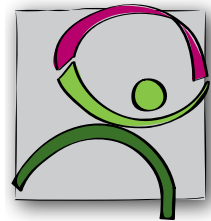
- We're going to look at the three steps associated with changing address information:
 - Creating a Task in **PATR**
 - Accessing the **PEDM** Screen
 - Updating the Address

Slide 10: Create a Task in PATR

- Before updating an address or phone number, you have to create a Work Task in **PATR**
- In **CI**, key the member's MBI on the **PAPI** screen, toggle over to the **PATR** screen.
 - **Complete the appropriate fields:**
 - **Request Signature Dt** - LINET uses **01/01/2003**
 - **ECN** - LINET uses **444444444**
 - **Communication/DocType** - LINET uses **010 (See Facilitator Note)**

FACILITATOR NOTE: The **Communication / Doc Type** is a 3-digit identifier. You can press **F10** to pop out a list and select a code from table. You would press **F9** to return.

- **Enrollment Group ID** - LINET uses **247318** (Non-NY) or **247321** (NY). Note: verify it's the same on enroll form as **PATR** Screen.
- Press **F4** and **New Task Requested** message displays
- Press **Enter**, and tab to **Command** line, type **PEDM**
- When the **PEMN** screen displays, select the **PEDM** screen from the list.



Mentor



Say This



Facilitator Note



Say This

FACILITATOR NOTE:

If the little angry-man icon appears, when creating a task, then press the **CTRL** key to begin typing again.

Slide 11: Change the Address on the PEDM Screen

- Verify with the caller their correct address. Check spelling, where appropriate.
- You must change the: Address, Zip code, FIPS County Code, City, and State. *(The location of these fields is in the outlined section of this slide.)*

IMPORTANT NOTE: Be sure to document the address you are changing in your CRM Notes.

Slide 12: Update the Address

- Input the correct information into the respective fields *(See **Find the FIPS County Code** instructions.)*
- Once all changes have been made to the address, press **F11** *(See **Important Note** on the next page.)*
 - **Result:** *This should give you a message at the bottom of the screen saying the changes were successful.*

Find the FIPS County Code:

- Tab to the **FIPS Cnty Cd** field
- Press **F10**
- Choose the correct County within zip
- Press **F4** to display
- Press **F9** to return to the **PEDM** screen



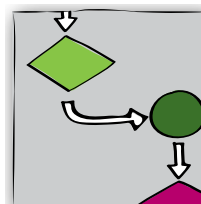
Facilitator Note



Important Note



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Process

IMPORTANT NOTE:

Once the changes are complete, advise the member to contact their local Post Office to receive all forwarding mail at their new address. Also advise them to contact SSA / Medicare and update their address information in their systems as well.



Important Note

Slide 13: Mentor

- For additional information on changing addresses, refer to:

[Creating a Work Task on the PATR Screen](#)

[Updating LI NET Member Address and Telephone Number](#)

Slide 14: Learning Center

- Direct Learners to the **Demographics** section of the curriculum
- Instruct them to view the eMOD entitled:

CI 203305-CREATE TASK IN PATR-EMOD

- The eMOD is an interactive walkthrough from CI **PAPI** link to task creation and **PEMN/PEDM** screens

Slide 15: CI PEDM: Person Demographics Screen

- Demographic information must follow certain address standards to process an address change properly on the **PEDM** screen.

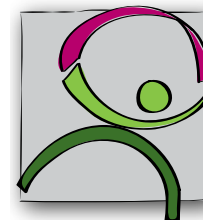
Mentor:

[Medicare and Medicaid Address Entry Standards](#)

Review **Address Standards** and **In Care of Addresses** instructions.



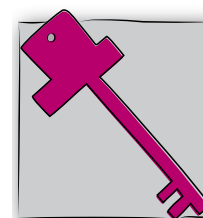
Learning Center



Mentor

Key Points:

- A P.O. Box address is only added to the **Mailing Address** field.
- Don't use punctuation or symbols in any address.
- Never place two spaces between any parts of the address.
- Use only U.S. Postal Service approved abbreviations.



Key Point

- If an address includes an apartment, suite, box, or lot number, then type that number in the first address field. Type the street address in the second address field.

Slide 16: CI PEDM Correct Format

Correct Format

```
MAILING (MANDATORY)
Address.. APT 4201
          5400 W SIENNA LN
City/Admn/Zip.. PEORIA IL 61615 - 7863
Country..... USA Forgn Post Cd..
Use Addr PID.. SSN..
```

FACILITATOR NOTE:

Temporary guidelines indicate a Post Office Box **cannot** be used as a permanent residential address. When updating a temporary address, be sure to follow this guideline and don't update the residential address with a P.O. Box.

Slide 17: Q&A session

- **Question:** Which address field is used to add a new address?
 - **Answer:** The Mailing (Mandatory) field.
- **Question:** Can you use punctuation or symbols in an address?
 - **Answer:** No.
- **Question:** Is it OK to have more than one space between words in an address?
 - **Answer:** No, it's not.
- **Question:** In which address field do you enter a Lot or apartment number? First or Second?
 - **Answer:** First.
- **Question:** What type of abbreviations can you use in an address?
 - **Answer:** Only U.S. Postal Service (USPS) approved abbreviations.



Facilitator Note



Q&A

- **Question:** After entering the new address information, which function key should you press to update the address?
 - **Answer:** The **F11** function key.
- **Question:** What main Mentor document should you access to handle address updates?
- **Answer:** The Mentor document [LI NET Customer Service Member Demographic Changes Overview](#).

Slide 18:

- **Ask Learners:** What Questions do you have about Address Changes?
- **Answer:** Open Discussion