**Compass - Edit or Cancel a Self-Submitted Support Task**

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**Description:** Steps for agents to edit, add/edit notes, or cancel a Support Task that they have submitted themselves in Compass. Support Tasks were formerly known as Resolution Manager (RM) Tasks and Service Resolutions.

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| Edit a Self-Submitted Support Task |



* To edit/cancel Support Tasks submitted by someone else, reach out to the Senior Team.
* **Do not**click the Mark Status as Complete button or change the status of the task.

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| **Step** | **Action** | | |
|  | New, self-submitted Support Tasks can be edited from two locations:   * From the **Support Task** tab, immediately after creating a new Support Task. * By accessing **Support Task History** and opening an existing Support Task. | | |
| **If the new Support Task tab is…** | **Then…** | |
| Open | From the open **Support Task** tab, locate the information to be updated. Then proceed to [Step 4.](#Step5Click)  A screenshot of a computer  AI-generated content may be incorrect. | |
| Closed | Proceed to the next step. | |
|  | Navigate to the Case Details Landing Page, then scroll to the **Member’s Recent Support Tasks** section in the left panel.  A screenshot of a member support  AI-generated content may be incorrect. | | |
|  | Click the **Support Task** hyperlink for the Support Task that needs to be edited.  **Note:** Click **View All** to see additional tasks.  Only Support Tasks with a status of **New** can be edited. For all other support task statuses, contact the Senior Team.  A screenshot of a support  AI-generated content may be incorrect. | | |
|  | Click the **pencil icon** in the field to edit the Support Task.  **Note:** To cancel a Support Task, refer to [Cancel a Self-Submitted Support Task](#_Cancel_a_Service).  A close-up of a person  AI-generated content may be incorrect.  **Result:** All editable fields become active and editable.  A screenshot of a computer  AI-generated content may be incorrect. | | |
|  | Complete and/or update fields as needed. Refer to the following scenarios as appropriate:     * If **Type** is changed, you may be prompted to update additional fields. * **Only** complete **Notes** as directed by the CIF. * Under no circumstances is it appropriate to list full credit card/debit card numbers or EFT/ACH routing and account numbers in a support task. | | |
| **If…** | | **Then…** |
| Adding a previously filled Rx | | 1. Click the **Add Rx Number** button, located in the top-right corner, to display the Search screen.   A screenshot of a computer  AI-generated content may be incorrect.   1. Enter criteria into the **Search by Rx Number or Drug Name** field and click **Search**. 2. Update the **Show Last** and **Date Range** fields, as needed, then click **Apply**.   **Result:** A list of previously filled displays.   1. Select the desired Rx and click **Save**.   **Result:** Previously filled Rx is added to the Support Task. |
| Adding a Provider | | Refer to [Compass - Adding a Provider to Submitted Support Task (074226).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=02c153cf-704c-4e27-9e1f-a4633adf546c) |
| Adding a drug not listed | | 1. Click the **Add Drug** button, located in the top-right corner, to display the Search screen.   A screenshot of a computer  AI-generated content may be incorrect.   1. Enter the **Drug Name**, **GPI**, or **NDC** into the corresponding field and click **Find**.   A screenshot of a computer  AI-generated content may be incorrect.  **Result:** A list of drugs displays.   1. Select the desired drug and click **Save**.   **Result:** Selected drug is added to the Support Task. |
| Adding a Payment Method | | 1. Click the **Add Payment Method** button, located in the top-right corner.   A screenshot of a computer  AI-generated content may be incorrect.  **Result:** The Add Payment Method popup displays:  A screenshot of a computer  AI-generated content may be incorrect.   1. Select the radio button for the payment type the caller indicates they want to use, then click **Save**.   **Result:** The Success Message displays, Payment Method is added to the Support Task:  A screenshot of a computer  AI-generated content may be incorrect. |
| Deleting a drug | | Click the **down arrow,** located in the last column, and select **Delete**.  **Note:** Down arrow only displays when drugs are present.  **Result:** Selected drug or Rx is removed from the Support Task. |
|  | After all updates are made, click **Save**.  **Result:** Support Task changes are saved. The **Support Task History** panel displays the history for that specific Support Task.  A screenshot of a computer  AI-generated content may be incorrect. | | |
|  | Close the Task by clicking the **X** on the **Task** tab.  **Do not**click the Mark the Status as Complete button or change the status of the task.  A screenshot of a computer  AI-generated content may be incorrect. | | |

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| Adding Notes |

**Do not**click the Mark Status as Complete button or change the status of the task.

**Notes:**

* Task Notes are not editable once a Support Task is submitted – only new notes can be added to the created task.
* New Notes can be added to an existing Support Task, including tasks created by other CCRs.

Perform the following steps to add new notes to the Support Task created:

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| **Step** | **Action** |
| **1** | Navigate to the **Notes** field and click the **down** arrow, then click **New**.  A screenshot of a computer  AI-generated content may be incorrect.  **Result:** Untitled Note displays. |
| **2** | Enter notes here, as required.  **Note:** Ensure you are following any instructions as stated in the CIF.  Under no circumstances is it appropriate to list full credit card/debit card numbers or EFT/ACH routing and account numbers in a support task.  A screenshot of a computer  AI-generated content may be incorrect.  **Note:** Do not change font size or format. |
| **3** | Click **Done**.  **Result:** Notes are visible to anyone who views this Support Task.  A screenshot of a computer error message  AI-generated content may be incorrect. |
| **4** | Close the Task by clicking the **X** on the **Task** tab.  **Do not**click the Mark Status as Complete button or change the status of the task. |

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| Cancel a Self-Submitted Support Task |

**Do not**click the Mark Status as Complete button. Perform the steps below:

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| **Step** | **Action** |
| **1** | Open the Support Task (refer to Steps 1-3 in the [Edit a Self-Submitted Support Task](#_Adding_a_PBO_1) section). |
| **2** | Click the **Cancelled** portion of the status bar, then click the **Mark as Current Status** button.  A screenshot of a computer  AI-generated content may be incorrect.  **Result:** The Support Task is cancelled and the Status bar is updated.  A screenshot of a computer  AI-generated content may be incorrect. |

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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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