# Aetna Compass - Add / Edit / Delete Phone Number

[Reminders](#_Toc155950443)

[Adding a Phone Number](#_Toc155950444)

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**Description:** Shows how to add, edit, and delete a member’s phone number in Compass.

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| Reminders |

Verify that the caller has authorization to add the member’s phone number.

* As needed, advise the caller you can only update their individual phone number and those for any minor children.

**Authorization Notes:**

Review Member Alerts to determine if there are phone number–related restrictions on the account. If restrictions exist, take note of which members are affected and adhere to the restrictions.

Authorized party callers (benefits offices, prescribers, individuals calling on behalf of the member, etc.) are NOT authorized to make phone number changes **without placing an order**. Only members (and designated individuals such as POAs) can make these requests.



 Confirmation is required from the other adult members on the account before their phone number can be added or changed. If needed, ask if the other adult members are available to make changes during the call.

* If the other adult member comes on the line to approve the caller to update contact information, you must have the member re-authenticate before making any changes.
* If the other adult member is unavailable, advise the caller that they can call back or update their phone number individually on the Member Web Portal.

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| Adding a Phone Number |

 If multiple phone numbers are listed on the member’s profile, delete any duplicate or additional phone numbers that are no longer applicable to the member. Refer to the [Deleting a Phone Number](#_Adding_a_Plan) section below.



Perform the following steps if a member requests that a phone number be added on their account:

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| **Step** | **Action** | | |
| **1** | From the Member Snapshot Landing Page, navigate to the **Contact Information** panel, **Phone Number** section, and click **View All**.    **Result:** The **Phone Numbers** popup displays. | | |
| **2** | Obtain the member’s new phone number and review the phone numbers already on file for the member. | | |
| **If the new Phone Number is...** | | **Then...** |
| Not listed | | Click the **Add** button, then proceed to Step 3. |
| Already listed | | Verify that the phone number in the system is correct, including the Type, any necessary Extension, or Contact Preference information:   * If yes, no further action is needed. * If no, proceed to the Editing a Phone Number section below. |
| Already listed, but the system indicates it is invalid | | Advise the caller that the phone number has been flagged as invalid. This occurs if the Messaging Platform attempted to contact the plan member twice, but the phone was disconnected, busy, or did not have voicemail.  Verify that the phone number in the system is correct:   * If yes, click the **Reset** button. * If no, proceed to either the [Editing a Phone Number](#_Editing_a_Phone) or [Deleting a Phone Number](#_Deleting_a_Phone) section below. |
| **3** | In the **Add Phone Number** popup, type the new phone number in the **Phone Number** and (if applicable) **Extension** fields, then select the **Type** (**Mobile** or **Other**).  **Note:** The system will display an error if the phone number is not in the correct format or if it includes an invalid Area Code. | | |
| **4** | Ask the member their contact preference and click the appropriate checkbox(es):   * **Daytime:** Calls in the AM * **Nighttime:** Calls in the PM * **Text Messages:** Receive a text message (only select for mobile phone numbers) | | |
| **5** | Repeat the phone number back to the member to ensure it is correct, then click **Add**.    **Result:**   * A message will display: “Phone number was successfully added”. * A popup will display the following message: “Reminder: Update member’s messaging preferences when updating phone number.” Click **Close** to exit the popup.   + Contact information and Messaging Preferences are located at the top middle panel of the Member Snapshot Landing Page. Refer to [Aetna Compass - Managing Messaging Platform (MP) Notifications (064252)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9d641520-395f-4b80-ab61-f2851dc486b9) to update messaging preferences. | | |
| **6** | Determine if the member is Commercial or Med D. | | |
| **If the member is...** | **Then...** | |
| Commercial | Advise the member and adult dependent that they need to contact their Plan Sponsor (such as primary cardholder’s employer, HR/Benefits Office) to have their information permanently updated.  **Note:**  The address will not be updated in GPS until the updates have been made by their plan sponsor. | |
| Med D | Educate the member and adult dependent that the number change has been made, but to have the information permanently updated the member will need to be referred to the Member Services (MSO) queue using the appropriate transfer VDN. Refer to [Aetna - Departments and Programs (Phone, Addresses, and Hours) (068189)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c0357fa4-f9b1-4895-ae82-cbc20e9820a7).  **Note:** This number is for internal use only, never give it to a member.  Internal Transfer Code: You must warm transfer - dial 888-800-5979 then the appropriate code.   * Allina Health – 26025 * Aetna NextGen – 26019 * State of Connecticut: Group MAPD/PDP – Code 26192   Hours of Operation: 8:00 AM - 11:00 PM EST, 7 days a week  **For Group Plans**:  Check the CIF for directions to processing changes for group plans. Follow any directions for address and or plan changes in CIF, including transferring the call, sending letters, etc.   * Have the member contact their employer and provide information from the PST as appropriate. * Document appropriately in Compass.   If there are no directions in PST for address or plan change processing, have the member contact their employer. | |

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| Editing a Phone Number |

 If multiple phone numbers are listed on the member’s profile, delete any duplicate or additional phone numbers that are no longer applicable to the member. Refer to the [Deleting a Phone Number](#_Adding_a_Plan) section below.

Perform the following steps if a member requests that a phone number be edited on their account:

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| **Step** | **Action** | |
| **1** | From the Member Snapshot Landing Page, navigate to the **Contact Information Panel**, **Phone Number** section, and click **View All**.    **Result:** The **Phone Numbers** popup displays. | |
| **2** | Review the phone numbers already on file for the member and locate the phone number that needs to be edited. Then click the **Row Level Action** drop-down arrow to select **Edit**. | |
| **3** | In the **Edit Phone Number** popup, edit any information the member wants to change, then click **Save**.    **Result:**   * A message will display: “Phone number was successfully added”. * A popup will display the following message: “Reminder: Update member’s messaging preferences when updating phone number.” Click **Close** to exit the popup. Refer to [Aetna Compass - Managing Messaging Platform (MP) Notifications (064252)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9d641520-395f-4b80-ab61-f2851dc486b9) to update messaging preferences.   **Notes:**   * When editing the phone number, always repeat the phone number back to the member to ensure it is correct. * The system will display an error if the phone number is not in the correct format or if it includes an invalid Area Code. * The Contact Preference checkboxes indicate the following:   + **Daytime:** Receives calls in the AM   + **Nighttime:** Receives calls in the PM   + **Text Messages:** Receives text messages (only select for mobile phone numbers) | |
| **4** | Determine if the member is Commercial or Med D. | |
| **If the member is...** | **Then...** |
| Commercial | Advise the member and adult dependent that they need to contact their Plan Sponsor (such as primary cardholder’s employer, HR/Benefits Office) to have their information permanently updated.  **Note:** The address will not be updated in GPS until the updates have been made by their plan sponsor. |
| Med D | Educate the member and adult dependent that the number change has been made, but to have the information permanently updated the member will need to be referred to the Member Services (MSO) queue using the appropriate transfer VDN. Refer to [Aetna - Departments and Programs (Phone, Addresses, and Hours) (068189)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c0357fa4-f9b1-4895-ae82-cbc20e9820a7).  **Note:** This number is for internal use only, never give it to a member.  Internal Transfer Code: You must warm transfer - dial 888-800-5979 then the appropriate code.   * Allina Health – 26025 * Aetna NextGen – 26019 * State of Connecticut: Group MAPD/PDP – Code 26192   Hours of Operation: 8:00 AM - 11:00 PM EST, 7 days a week  **For Group Plans**:  Check the CIF for directions to processing changes for group plans. Follow any directions for address and or plan changes in CIF, including transferring the call, sending letters, etc.   * Have the member contact their employer and provide information from the PST as appropriate. * Document appropriately in Compass.   If there are no directions in PST for address or plan change processing, have the member contact their employer. |

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| Deleting a Phone Number |

 If multiple phone numbers are listed on the member’s profile, delete any duplicate or additional phone numbers that are no longer applicable to the member.

Perform the following steps if a member requests that a phone number be deleted from their account:

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| **Step** | **Action** | |
| **1** | From the Member Snapshot Landing Page, navigate to the **Contact Information Panel**, **Phone Number** section, and click **View All**.    **Result:** The **Phone Numbers** popup displays. | |
| **2** | Review the phone numbers already on file for the member and locate the phone number that needs to be deleted. Then click the **Row Level Action** drop-down arrow to select **Delete**. | |
| **3** | In the **Delete Phone Number** popup, review and verify the phone number the caller wants to delete from their member account, then click **Delete**.    **Result:** A message will display: “phone number was successfully deleted, and messaging preferences were changed”. | |
| **4** | Determine if the member is Commercial or Med D. | |
| **If the member is...** | **Then...** |
| Commercial | Advise the member and adult dependent that they need to contact their Plan Sponsor (such as primary cardholder’s employer, HR/Benefits Office) to have their information permanently updated.  **Note:** The address will not be updated in GPS until the updates have been made by their plan sponsor. |
| Med D | Educate the member and adult dependent that the number change has been made, but to have the information permanently updated the member will need to be referred to the Member Services (MSO) queue using the appropriate transfer VDN. Refer to [Aetna - Departments and Programs (Phone, Addresses, and Hours) (068189)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c0357fa4-f9b1-4895-ae82-cbc20e9820a7)  **Note:** This number is for internal use only, never give it to a member.  Internal Transfer Code: You must warm transfer - dial 888-800-5979 then the appropriate code.   * Allina Health – 26025 * Aetna NextGen – 26019 * State of Connecticut: Group MAPD/PDP – Code 26192   Hours of Operation: 8:00 AM - 11:00 PM EST, 7 days a week  **For Group Plans:**  Check the CIF for directions to processing changes for group plans. Follow any directions for address and or plan changes in CIF, including transferring the call, sending letters, etc.   * Have the member contact their employer and provide information from the PST as appropriate. * Document appropriately in Compass.   If there are no directions in PST for address or plan change processing, have the member contact their employer. |

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| Related Documents |

**Abbreviations/Definitions:** [Customer Care Abbreviations, Definitions, and Terms 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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