# Aetna Compass - Mail Order Payment History Screen

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**Description:** Provides the steps for viewing the Mail Order Payment History screen, making a payment on the Mail Order Payment History screen, and mailing a payment.

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| Reminders |

 Flexible Spending Account (FSA) and Health Saving Account (HSA) credit cards **can** be used to pay outstanding balances. The member cannot pay an outstanding balance on the account that incurred before their HSA account was established.

Do Not list the full credit card number or E-check routing and account numbers in any comments field. This includes but is not limited to Support Task comments/notes and Alert comments. Credit card numbers and E-check routing and account numbers may only be entered in system-specified credit card number/E-check routing and account number fields. All comments fields are periodically checked for compliance. Users who fail to abide by policy may be subject to disciplinary action.



 In the event of a mail tag, the member’s account balance will be credited when the medication is received in the mail order pharmacy. Until then, all future fill order costs will be included in the overall balance of the member’s account. Offer alternatives such as [Aetna Compass - Maintenance Choice (MChoice) Rx Transfer (064358)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=62b493df-63e0-489e-a5d5-c5729d513349).

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| Viewing Balance and Making a Payment on the Mail Order Payment History Screen |

Perform the following steps to view the current account balance and make a payment on the Mail Order Payment History screen:

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| **Step** | **Action** | | | |
| **1** | From the Claims Landing Page **Quick Actions** panel, click the **Current Balance** hyperlink.    **Result:** The Mail Order Payment History screen displays.    Compass will display the member’s transactions:   * Date of transaction * Transaction Type * Status (Pending/Complete) * Order # (hyperlink to Order Details) * Payment Confirmation # * Comments * Amount * Balance   **Notes:**   * If the balance is past due, Compass displays the balance in **red text** followed by a warning icon . * Compass displays credits on the account with the negative sign before the **$** symbol. (**Example:** -$100) * Agent will have the option to search for Mail Order Payments across accounts using the **Search across Accounts** hyperlink. Refer to [Aetna Compass - Payment - Finding (Locate) a Payment (064236)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ef6c2c19-1dbf-4e25-80e4-8bb5fddf698a) as needed. | | | |
| **2** | Verify the **Balance** due.    **Result:** The **Balance** field populates with the total balance due for all family members under the Cardholder.  **Notes:**   * If the member states they received a bill, but $0.00 is showing as due, look for a recent payment or search by name and DOB to locate any other accounts that may show a balance due. * The **Date Range** can be filtered up to a maximum of 2 years. * If an order is initiated by the provider’s office and the member does not have a default method of payment on file, this can generate a balance on the member’s account. | | | |
| **3** | Verify payment amount the plan member wishes to pay and enter it in the **Amount** field.  Refer to the following scenarios as needed: | | | |
| **If…** | | | **Then…** |
| The error message “Enter an amount less than or equal to the balance” displays | | | The payment amount entered is greater than the balance due. Enter the correct payment amount. |
| The error message “Enter an amount greater than zero” displays | | | The payment amount entered is less than or equal to $0. Enter the correct payment amount. |
| **4** | Ask the member:  How would you like to pay for your balance today? We accept payment by credit card or electronic check.  **Note:** If Payment Method is not set as default payment, ask the caller if they would like to make it the default payment on file or if this will be a one time payment.   * **If yes,** click **Add/Update,** then select the **Default Payment** checkbox and inform the member the credit card will be automatically charged when future orders are received, unless a different form of payment is provided. Click the **Refresh for Updates** button to view the update in the drop-down menu. * **If no,** proceed to the next step. | | | |
| **5** | Select the appropriate payment method from the **Payment Method** drop-down menu.  **Notes:**   * If the member or Power of Attorney/Legally appointed representative is calling, proactively provide them with the last four digits and expiration date for credit cards, or the financial institution and account type for electronic checks. * If it is **NOT** the member or Power of Attorney/Legally appointed representative calling, ask the third party caller or the last four digits and expiration date for credit cards, or the financial institution and account type for electronic checks. Refer to [Aetna Compass - Guided Caller Authentication(064123)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a29fcb21-bff8-4fe4-a946-0dc700954fe0). * If the third-party caller is unable to provide the account information (**Example:** Does not have the credit card with them currently), ask if the default payment account should be used. If no default is set, ask if the most recently used payment account should be used. * Notate the member’s account that this discussion took place. | | | |
| **If…** | **Then…** | | |
| The payment account is not on file | Refer to [Aetna Compass - Add, Edit, and Delete Mail Order Payment Methods (Credit Card & eCheck) (064234)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=40bc4720-700b-441e-8d15-aa3075ea9f81) for instructions on adding new payment methods.  **Notes:**   * For deceased members, a third-party may add a new method of payment to make a one-time payment only. | | |
| Any payment method that is expired will be inactive and not be able to be selected. | Ask the member for the new expiration date and select the **Add/Update** button to update the card. Refer to [Aetna Compass - Add, Edit, and Delete Mail Order Payment Methods (Credit Card & eCheck) (064234)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=40bc4720-700b-441e-8d15-aa3075ea9f81) for instructions on editing a credit card. Click the **Refresh for Updates** button to view the update in the drop-down menu.  **Notes:**   * If the member does not have a new expiration date for the credit card, ask for a different method of payment. | | |
| The payment account marked as Exclusive is selected (Exclusive or Exc) | The following pop-up message displays: | | |
| **If the originator of the exclusive payment account…** | **Then…** | |
| Is on the phone | Click the checkbox “I have spoken to and authenticated <Member Name>” and proceed to the next step. | |
| Is **not** on the phone | The account should only be used with the originator’s permission. Ask if the originator is available to speak with you for a moment to authorize the transaction.   * If yes, authenticate the originator, click the checkbox “I have spoken to and authenticated <Member Name>”, and proceed to the next step. * If not available, click **Cancel** and suggest that a different payment account be used or for the originator to contact us (or login to the secure member website) at their convenience to apply the payment.   **Notes:**   * POAs are authorized to act on behalf of the member and can apply payments to an exclusive account. * In situations in which there is custody of a dependent, non-member calling on behalf of the member, etc., if the call is fully authenticated and the caller can verify the payment account information, continue with applying the payment to the exclusive account. Reach out to the Senior Team if you are unsure or feel that the situation may lead to unauthorized use of the account. | |
| **6** | Adjust the amount to be charged, if necessary, and click the **Submit Payment** button to make the payment.  **Result:** Screen refreshes showing the payment made in the history table and the balance will be reduced to show the difference between the payment made and the original balance. The system generates an auto comment stating, “Payment Received.”  **Note:** Confirmation numbers for electronic payments display on the **Mail Order Payment** **History** screen. If the member requests a confirmation number, provide the number associated with the payment.  Advise the member that the payment will display on their bank/credit card statement, and that they can verify their account balance at Caremark.com.   * If member is not satisfied and requests a receipt for the payment made, refer to [Aetna Compass - Mail Order Payment History/Payment Dispute Support Task (Mail Order Claims Only) (064247)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=26c757d5-b3d1-4bb7-87a9-0c894e060380). | | | |
| **If selecting a credit card account and the following message is displayed…** | | **Then…** | |
| “Credit card pre-approval is denied. Please select another card/payment method.” | | Your credit card was not approved. Usually when this occurs, the system cannot confirm the credit card has funds available for the Total Cost of the order. Would you like to split the payment with another method of payment, or do you have an alternative method of payment that might be approved for the Total Cost of the order?  **CCR:** Refer to [Aetna - Payment - Credit Card Pre-Authorization & Talk Tracks (019272)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0c2f5cbd-782a-4b62-91a9-af83b42dcd33). | |
| “Credit card is partially approved for <xx.xx> amount. Do you want to select another card/payment method or continue with this amount? Please note there will still be a remaining balance on the account which could cause a delay in processing future orders.*”* | | * If the member would like to continue with the pre-authorized amount, click **Submit Payment**. * If the member does not want to continue with the pre-authorized amount, click **Change Payment Method**. * If the member wants to use a Payment Method listed on the account, select it from the **Payment Method** drop-down menu. * If the member wants to add a new Payment Method, refer to [Aetna Compass - Add, Edit, and Delete Mail Order Payment Methods (Credit Card & eCheck) (064234)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=40bc4720-700b-441e-8d15-aa3075ea9f81) for instructions on adding new payment methods. | |
| **7** | If a one-time payment was selected, after the one-time payment is complete, follow the steps to remove the Credit Card or eCheck from the member’s account. Refer to [Aetna Compass - Add, Edit, and Delete Mail Order Payment Methods (Credit Card & eCheck) (064234)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=40bc4720-700b-441e-8d15-aa3075ea9f81). | | | |

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| Mailing a Payment to CVS Caremark |

Perform the following steps when a member wants to mail a payment for an outstanding balance:

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| **Step** | **Action** |
| **1** | From the Member Snapshot Landing Page, selectthe **Mail Order Payments** tab.  **Note:** To verify balance, refer to the [Viewing Balance on Making a Payment on the Mail Order Payment History Screen](#_Log_Activity) section above. |
| **2** | In the **Alternative Payment Options** section, locate Check/Money Order and hover over the **Information** icon.  **Result:** Disclaimer willdisplay. |
| **3** | Instruct the member to add the ID# located on their member ID card to the check or money order (in case there is a separation of payment).  **Notes:**   * It is important to note that balances being paid off on separate accounts require separate checks specific to each account. One check cannot be split between two accounts. * The Invoice should be mailed in with the payment, but if the member doesn't have the invoice, the member ID# needs to be placed on the check or money order. * Make check payable to CVS Caremark or the applicable client’s name.   Provide the following address to mail the payment:  CVS Caremark, Inc  P.O. Box 659539  San Antonio, TX 78265-9539 |

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| Scenario Guide |

Refer to the following scenarios as needed:

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| **Scenario** | **Action** |
| If the member has an account lock for recurring payment issues and an open order diverted to the AAD queue. | * The member will need to speak with Accounts Receivable to arrange for payment. * Accounts Receivable contact information can be located in the Order Alerts within the **Order Number** hyperlink. |
| If a member calls in asking about using BillPay online with their bank and is questioning the ID number to use. | * Customer Care may advise the member to use the ID number from their ID card. * If the member does not have their ID card, help the member register on Caremark.com and educate how the ID card can be obtained from the website. |

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| Resolution Time |

Up to 10 business days from date of mail - Payment by Mail

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| Related Documents |

[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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