 Caremark.com - Update Profile via Account Menu

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**Description:** Provides information for Customer Care/Internal Users when assisting members with their Caremark.com Profile.

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| Informational Overview |

**Note:**  Screen capture might not match actual scenario for this process. Some clients may not enlist in specific web features. This work instruction/job aid is intended as a guide only.

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| Update Profile |

Follow the steps below:

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| **Step** | **Action** | |
| **1** | Access the member’s Compass profile and click **Caremark.com – Registered**.  **Result**: Caremark.com Dashboard displays. | |
| **2** | Click **Account** at the top left of the screen.    **Result:** A drop down will appear with the Account Menu. | |
| **3** | **Members** have the option to select:   * Profile * [Communication Preferences](#CommunicationPreferences) * [Payment methods](#PaymentMethods) * [Balance & payment](#BalanceandPayment) * [Shipping Information](#ShippingInformation) * [Family Access](#FamilyAccess) * [Member ID Card](#MemberIdCard) | |
| **4** | **Internal Customer Care users:**  **Delete Registration** and **Lockout Member** tools are located on their own page and can be accessed by clicking **Customer Care** from the bottom of the left menu.    The following options are available to Customer Care to assist the member:   * [Delete registration](#DeleteRegistration) * [Lockout member](#LockOutMember)     Use reference table below: | |
| **If Selecting…** | **Then…** |
| **Delete Registration**(Customer Care/Internal Users only) | Click **Customer Care** from the bottom of the left menu.  **Note:** If member is not registered, the option to select Customer Care will not be available.  Also refer to[Caremark.com – Deleting Member Registration (020863)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1bdc5b7d-4fc6-4bab-8265-72ebcd074030).   * **Delete registration** will no longer use a checkbox to confirm action. If Customer Care clicks **Delete registration**, a modal is prompted to confirm action.       **Note:** If you have not been trained or given the PeopleSafe role code needed to delete a member registration, contact the Senior Team for assistance. Refer to[PeopleSafe - When to Transfer Calls to the Senior Team (016311)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=9eef064d-c7d7-42f7-9026-1497496b4d51" \t "_blank).   * If the member insists on using the same email address as their username when registering under their current/active account, perform a name and date of birth search in PeopleSafe to locate the previously registered plan and delete the registration. This allows the member to re-register using their email address as the username.   **Note:**If unable to locate a previously registered account or after deleting the registration, the member is receiving an error when registering or is unable to sign in after re-registering, submit a web error form to have the issue researched. Refer to:   * [Caremark.com – Web Error Form Process (Internal) (041424)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a082ab2a-cbb5-4803-a27a-339f8c30cac9) * [Caremark.com - Web Error Form Process (Vendor Teams Only) (046777)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=97f7ff71-4831-453d-b292-183506cab4d2) |
| **Lockout member**(Customer Care /Internal Users only) | Option to **Lockout member** no longer uses a checkbox to confirm action. If Customer Care selects Lockout member, modal is be prompted to confirm action.      In some cases, members are locked out because of Confidential Communications received by the client or a HIPAA/Privacy related issue. Review the **Priority/Stop See comments** in PeopleSafe before unlocking a member’s Caremark.com account.  A member see the following message if they are locked out:    If this appears, review the Priority/Stop See comments in PeopleSafe before unlocking a member’s Caremark.com account. If the Priority/Stop See comment clearly states the members account can be unlocked by selecting the unlock member button. |

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| Additional Links on the Profile Page |

These additional links are also available on the Profile page from the left menu:

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| **Payment Methods** | Assisting the member | Select **Payment Methods** from the left menu.  Refer to [Caremark.com - Payment Options (038260)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=dcbe2368-ea4d-4371-8171-302498cff3fe) for more detailed information.  Members can **add**, **edit**, or **remove** a payment method.   * **To Add a payment method:** The member clicks the desired method of payment. Payment options are client specific and might include Electronic Check Processing and Credit Card.      * **To Edit a payment method:** The member clicks **Edit** to the right of the account. * **To Remove/Delete a payment method:** The member clicks **Remove** to the right of the account and click Confirm Deletion.   **Note:** If there is only one (1) method of payment on file, an error might be received when removing the payment method. The member needs to add another method of payment before deleting the existing payment method:  **” In order to process your automatic refill or automatic renewal request(s), please provide a different default payment account before deleting this account”.** |
| **Shipping Information** | Assisting the member | Select **Shipping Information** from the left menu.     * Members can **add** or **edit** their primary address, but it **cannot be deleted**. * An alternate address can be **added**, **edited**, or **deleted**.      * **To Edit a primary address:** The member clicks **Edit primary address**. * Click **Save address.**      * **To Add alternate address:** The member clicks **Add alternate address**. * An **Effective** and **Expiration** date must be inputted. * Click **Save address.**   **Note:** If an order or orders are already in process, adding or editing an alternate address will not change the address for the in-process order(s). |
| **Communication Preferences** | Assisting the member | Click **Communication preferences** from the left menu.  Refer to [Caremark.com – Set Communication Preferences (Contact Information) (004893)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=273206e3-9a9c-4f88-9dda-e2abd972834c) for more detailed information.    Members have the following options:   * Enroll in **Paperless settings.** * Add/Edit Alert settings for **phone, text, and email channels**. * **Drug name display** (Show full drug name). * Add/Edit **Contact Information** (phone and email).   If show full drug name is not selected, the member only sees the first three (3) letters of the drug name in their communications. |
| **Family Access** | Assisting the member | Select **Family Access** from the left menu.  Members can grant **Family Access** to dependents age 18 and older to allow registered adult family members view their prescription information from their profile on Caremark.com. The minimum age can vary based on the client. If there are no members of the family over the age of 18, the page will state “There are no other users registered with the same participant code.”  Refer to [Caremark.com - Family Access (038380)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d6408838-7a13-4751-a95d-b9b36a931b68). |
| **Balance & payment** | Assisting the member | Click **Balance & payment** from the left menu.  Refer to [Caremark.com - Account Balance and Payments (038113)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e6c30ce7-caf7-4c75-96e7-ada6ab0731e3) for more detailed information.    **Note:** Outstanding balances do not include orders in process or still in the shopping cart (order not submitted yet).   * Members have option to **Pay balance in full** or **Enter payment amount**. * **Choose payment method:** Balances can be paid with an existing payment method on file or a new payment method can be added. * Link is available to view payment and activity history. * Outstanding balances can be paid with an FSA/HSA/HRA card. * Click **Pay Now** to submit payment. |
| **Member ID Card** | Assisting the member | Select **Member ID card** from the left menu.    Members can View/Print a temporary Member ID Card. (**Note:** The option to print an ID Card is client specific.)  Refer to [Caremark.com - Temporary ID Cards (038392)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d0795d43-9d76-41b7-a8d2-40238235649f). |

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| Related Documents |

**Parent SOP:** [CALL 0045 Customer Care Web Support Email Response and Handling](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0045)

[CALL 0011 Authenticating Caller](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0011)

**Abbreviations/Definitions:** [Customer Care Abbreviations, Definitions, and Terms (017428)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c1f1028b-e42c-4b4f-a4cf-cc0b42c91606)

**Index:** [Caremark.com - Work Instruction/Job Aid Index (105672)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=8a2da44a-6336-454d-8deb-fca4a71ad69b)

[Caremark.com – Deleting Member Registration (020863)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=1bdc5b7d-4fc6-4bab-8265-72ebcd074030)

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