# Compass - Create a Support Task

[Process - Inside Members Account](#_Toc207893847)

[Process - Outside Member Account](#_Toc207893848)

[Support Task Actions Buttons](#_Toc207893849)

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**Description:** Steps to open a Support Task (formerly known as Resolution Manager [RM] Task) with or without an existing claim in Compass.

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| Process - Inside Members Account |

 Support tasks should ONLY be submitted while the caller is still on the line. If the caller disconnects the line before the task has been completed contact your leader to determine whether to proceed with submitting the support task.



 The following Support Tasks **cannot** be submitted from the **Create Support Task** button (they can only be submitted via Automation):

* Reship
* Payment Dispute
* Invoice Copy
* Bulk Up/Courtesy Retranslation

**Note:** Eligibility tasks (when not in a member’s account), refer to [Compass – Resolution of Eligibility Issues (062827)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cba9d073-9e46-4d90-b86f-4566793c40f3) or [Compass - Mail Order Payment History/Payment Dispute Support Task (Mail Order Claims Only) (058044)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=54a5f0cf-a7cb-4533-9a46-49a39106d764).

 When creating a Support Task, create it for the member displayed in the **Member Details** section (left panel) – not for the member who was used to enter the account.

**Example:** If the account is opened as an Interaction Case as the Cardholder and **View Related Members** is changed to the Cardholder’s spouse, then the Support Task is for the spouse.

Complete the steps below:

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| **Step** | **Action** | |
| **1** | Determine if a Support Task has been created. Refer to [Compass - View Support Task History (050044)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=1674c564-fc41-42ad-a7c2-f3b610716cba).  Check PeopleSafe for task; refer to [Compass - Viewing Member's Recent Cases and Viewing PeopleSafe Activity (RM Task Information) in Compass (056036)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ab5a6f09-8f08-424b-bff7-b1aa5cfc4d6a).   * If yes, advise the caller that a Support Task already exists, and provide the turnaround time. * If not, proceed to the next step. | |
| **2** | Determine if the Support Task will be created from an existing claim.  **Note:** Best practice is to create a Support Task from an existing claim, if possible. | |
| **If the Support Task will be created...** | **Then...** |
| From an existing claim | There are two (2) options:   1. From the **Claims Details** tab, click the **Create Support Task** button in the top-right corner of the screen. Then skip to [Step 5](#In_MBR_ACC_Step_5).      1. From the Claims Landing page, click on the check box to the left of the RX# to select the drug. Then use the **Row Level Action** dropdown to create a Support Task from an existing claim. Then skip to [Step 5](#In_MBR_ACC_Step_5). |
| Without attaching a claim | From the **Case Data** section that displays on all Compass screens, click the **Create Support Task** button. Proceed to the next step. |
| **3** | After clicking **Create Support Task**, the New Support Task: Support Task window displays.  **Note:** Fields containing an asterisk (\*) are required. For additional information regarding the fields, refer to the below table: | |
| **Section** | **Description** |
| **Basic Information** | **Displays basic Support Task information.**  The following fields are required and dynamic:   * **Case:** This is the case number associated with the Interaction. Do **not** change the information in the Case field. * **Priority:** The priority of the Support Task. This field should display as **Normal** unless specified in the CIF.   The following fields display and **cannot** be changed:   * **Support Task Number:** Information display upon save * **Membership ID:** The member ID * **Owner:** The agent submitting the Support Task * **Eligibility:** Status of the member’s Eligibility(Active/Inactive) * **Effective Date:** The date the plan became active * **Expiration Date:** The presumed date of when the plan becomes inactive |
| **Issue Information** | **Displays specific data to help track and manage the Support Task.**  The following field displays and cannot be changed:   * **Category:** Based off the line of business. (**Example:** Commerical/Medicaid or Med D)      * **Customer Care:** Use the [Compass - Support Task Types and Uses List (058147)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=6753488f-3996-45d9-88ba-257575369a98) to determine the Support Task Type. * **PHD** **agents:** Use Support Task Type “Client Directive – PHD Only”. **Do no**t select “Plan Benefit Override – Care Only”.   The following fields are required (displayed by a red asterisk \*):   * **Type:** This will list different types of Issues that the task can be submitted. * **Contact Name:** This is the caller’s name. * **Contact Phone Number:** This is the caller’s phone number. * **Medicare D Plan:** This field indicates whether this is a Med D Plan (Yes/No). * Additional required fields may display based on the selected **Type.**   The following fields are optional and dynamic based on the selected **Type** (no red asterisk \* appears):  **Note:** Only enter data in this field if indicated in the [Compass - Support Task Types and Uses List (058147)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6753488f-3996-45d9-88ba-257575369a98).   * Subject * Image Number * Template Number     **Note:** Agents **do not** need to click the **View all dependencies** hyperlink. Fields are dynamic and populate based on the Type selected. |
| **Member Address** | **Displays Member’s Address.**  The following fields display:   * **Member Address Line 1:** Member’s address * **Member Address Line 2:** This is additional space to enter member’s address if its too long to fit into Member Address Line 1 * **Member City:** This is the city where the member lives * **Member State:** This is the state where the member lives * **Member Zip:** This is the member’s zip code for the address listed   **Note:** For address changes, refer to [Compass - Add / Edit / Delete Mailing Address (053255)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9cfb4422-7129-4bca-b1ea-f1d6fa964906). |
| **Fulfillment**  **For Customer Care agents ONLY** | **Displays Fulfillment Types specific to the Support Task.**  Information only populates in this field if **Fulfillment** is selected as the **Type** in the **Issue Form** section.  The following field is required:   * **Type of Form:** This lists different types of Forms the task can be submitted for (Appeals Letter, Claim Form, Order Form, etcetera.)     **Note:** CCR’s do **not** need to click the **View all dependencies** hyperlink. Fields are dynamic and populates based on the Type selected. |
| **Turn Around Time Information** | **Displays the Support Task Turn Around Time.**  The following field is required and dynamic:   * **Turn Around Time:** Displays the timeframe takes for various types of requests.   **Notes:**   * Issues, such as a need to contact the provider, may increase the TAT. * CCR’s do **not** need to click the **View all dependencies** hyperlink. Fields are dynamic and populates based on the Type selected. * Business days are generally Monday through Friday, but this may vary with the plan. * TAT is the TAT for the Task to be worked not for the completion of the task requested. |
| **Target Completion Date Information** | **Displays the Targeted Completion Date for the Support Task.**  **Target Completion Date:** A system-generated estimated date the task is to be completed based on standard service level agreements (SLAs) and task type. The target completion date is intended to provide general guidance on expected resolution timelines. Actual completion date may vary depending on task complexity, workload, or business needs. |
| **Additional Information** | **Displays Additional Information for the Support Task.**    **Note:** This section is dynamic and **may**include required fields or **pre-conditions** to verify if a Support Task is needed. These must be met to proceed. |
| **Notes** | **Displays Notes for the Support Task.**  **Only** complete the **Initial Task** **Notes**section as directed by the CIF; be sure you are leaving notes regarding why the task is required.  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. |
| **4** | **Saving Support Task** | Complete the required field (fields containing an asterisk \*) and sections as indicated in the step above, and then click **Save**.  **Note:** Do **not** click "Save and New." If you do so by mistake, click "**Cancel**." |
| **5** | **Customer Care Representatives only**   * **Override the following** section:Select the desired override in the **Available** box, then click the right facing arrow to add to the **Chosen** box.   **Note:** To remove a selection, click the left facing arrow.    **Note:** Agents **do not** need to click the **View all dependencies** hyperlink. Fields are dynamic and will populate based on the **Type** selected. | |
| **6** | Add required information using the Support Task Actions buttons:   * Add [Payment Method](#addpayment) * Add [Rx Number](#addrx) * Add [Drug](#adddrug) * Member Callback Request   **Note:** Callback requests should only be added when work instructions advise a Callback Support Task is required.  **Notes:**   * These buttons are displayed after the Support Task is submitted. * Compass is intuitive and Support Task Actions buttons are dynamic.   Review the [Support Task Actions Buttons](#_Support_Task_Actions) section for possible additional steps, depending on the Support Task Type.  **Action for this submission is not yet complete.** Prior to a successful submission of the Support Task, use the **Support Task Actions** buttons, if one displays, or the task will be returned in error, causing a delay in the member’s therapy.  If no Support Task Actions button displays, then the Support Task is successfully submitted. | |
| **7** | 1. Close the Task by clicking the **X** on the Tasktab.   **Do not** click the Mark Status as Complete button or change the status of the task.    **Result:** The Support Task is displayed in the **Member’s Recent Support Tasks** section on the left panel of the Case Details Landing Page.     1. Click **Refresh** to view recently submitted Support Tasks. | |

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| Process - Outside Member Account |

 Support tasks should ONLY be submitted while the caller is still on the line. If the caller disconnects the line before the task has been completed contact your leader to determine whether to proceed with submitting the support task.



 Only create a support task under the following circumstances:

* When outside of a member account **and** when an account cannot be located in Compass after exhausting all search options.
* If receive a CVSID error while in the members record **and** are unable to create a support task while in that case.

**Note:** For available tasks outside member account refer to [Compass - Support Task Types and Uses List (058147).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6753488f-3996-45d9-88ba-257575369a98)

Complete the steps below:

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| **Step** | **Action** | |
| **1** | * Conduct a [Compass - Member Search (050037)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44e71d7a-1b1c-4931-9089-d4161a72d114). Refer to [Compass - Resolution of Eligibility Issues (062827)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cba9d073-9e46-4d90-b86f-4566793c40f3). * Ask member Probing Questions in an attempt to locate an account. Refer to [Being a Power House Asking Probing Questions (010429)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6fdfb84b-6e96-4c50-997c-b8f2924958ed).   + Is there an alternate name the account could be under?   + Is there a hyphenated name? | |
| **2** | Click the **View Support Tasks - No Member Found** option from the Support Task ActionsDropdown    **Result:** Eligibility Support Task History displays. | |
| **If…** | **Then…** |
| Task has been created | Do not create another Support Task. Advise the member that the request is still in process and provide the turnaround time. |
| It has been five (5) or more business days and the task remains open | Warm conference/transfer the call to the Senior Team.  **Note:**Do not create another Support Task. |
| Task has been closed | Advise member of the results. |
| Task has NOT been created | Close the Support Task History Tab and Proceed to the next step. |
| **3** | Click the **Create Support Task - No Member Found** option from the Support Task ActionsDropdown.    **Result:** New Support Task Outside Member Account displays. | |
| **4** | * + 1. Complete the required fields (fields containing an asterisk \*) and sections as indicated in the step above.   **Notes:**   * If no member ID number is available, the member ID number should be 9999999. * Submit one task per family; for multiple family members put additional family information in the notes section. * Include Client Code and Client name if available     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.       * + 1. Click **Save**.   **Notes:**   * Do **NOT** click "Save and New." If you do so by mistake, simply click "Cancel." * If the Support Task is submitted and additional notes need to be added, locate your submitted Support Task by clicking **View Support Task – No Member Found** from the Support Task Actions dropdown. Refer to [Compass - Edit or Cancel a Self-Submitted Support Task (050032)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4ad65197-fe9e-4288-b5e3-23c771eff267) for instructions on adding notes for an already submitted Support Task. | |

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| Support Task Actions Buttons |

Refer to as needed:

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| **Support Task Actions Button** | **Action** |
| **Edit Support Task** | To edit the Support Task, refer to [Compass - Edit or Cancel a Self-Submitted Support Task (050032)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4ad65197-fe9e-4288-b5e3-23c771eff267). |
| **Add Payment Method** | 1. From the newly created **Support Task** tab, locate the information to be added. 2. Click the **Add Payment Method** button.     **Result:** The Add Payment Method popup displays.     1. Select the prefered Method of Payment, then click **Save**.    1. To exit, click **Cancel.**   **Result:** The **Save** button is disabled until the method of payment is selected. The Payment Method is successfully updated and is listed in the Support Task.       1. Return to [Step 6](#In_MBR_ACC_Step_6) of the Process section. |
| **Add Rx Number** | 1. From the newly created **Support Task** tab, locate the information to be added. 2. Click the **Add Rx Number** button.     **Result:** A list of Mail Order Rx(s) displays.     1. Select the Rx(s) to be added to the task, then click **Save**.    1. Utilize the **Search by Rx Number or Drug Name**, **Show Last** and **Date Range** fields to find prescriptions if needed. (The **Search** button is disabled until an Rx# or Name is entered.)    2. To exit search, click **Cancel**.   **Result:** When the update is successful, the message “Record Updated” displays, and Rx(s) are displayed under **Selected Rx Details**.     1. Return to [Step 6](#In_MBR_ACC_Step_6) of the Process section. |
| **Add Drug** | 1. From the newly created **Support Task** tab, locate the information to be added. 2. Click the **Add Drug** button.     **Result:** Drug Search displays.     1. Enter the Drug Name, GPI, or NDC and click **Find**.   **Result:** Drug Code Results displays.     1. Select the Rx(s) to be added to the task, then **Save**.    1. Utilize the **Clear** button if needed.   **Note:** The **Show** radio button can be used to list results as **Most Common** or **All**. (System defaults to show All.)   * 1. To exit search, click **Cancel**.   **Result:** When update is successful, message displays Record Updated, and Rx(s) are displayed under **Selected Drug Details**.     1. Return to [Step 6](#In_MBR_ACC_Step_6) of the Process section. |
| **Member Callback Request** | **Note:** If the **Member Callback Request** button is displayed on the newly created **Support Task** tab, a callback request can be sent.  Do not offer unless the member specifically requests a callback.   1. From the newly created **Support Task** tab, click the **Create Callback** button.   **Result:** The Member Callback Request popup displays.   1. Complete all required and applicable fields in the Create Callback popup. Once all required fields are completed, click **Next**.   **Result:** Message displays stating the Callback Support Task is successful and a Support Task <#> is provided.     1. Click **Finish**. |

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| Related Documents |

**Parent Document:**[CALL-0049 Customer Care Internal and External Call Handling](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0049)

[Compass - Edit or Cancel a Self-Submitted Support Task (050032)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4ad65197-fe9e-4288-b5e3-23c771eff267)

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

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