**Compass - Caremark.com Quick Registration**

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**Description:** This document provides the steps to view the members’ Caremark.com account and send a Quick Registration link for Caremark.com in Compass.

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| Reminders |

If a member cannot register as a result of not having a mobile number on file, send them a Quick Registration link to allow them to register using their email.

**When an Authorized Party has called on behalf of the member**, a Quick Registration link**can**be sent to the default email or via text to the default phone number that is currently shown in the member’s account. For more information, refer to [HIPAA Grid - CVS](file:///C:/Users/ABuccilli/AppData/Local/Microsoft/Windows/INetCache/Content.Outlook/2PO53Y4H/CMS-2-028920).

Minor dependents covered under the plan are not able to register until they turn 18 years of age. Their information is shown from the parent’s registered account (cardholder/spouse) until they turn 18.Some clients have a lower registration age. Refer to [Underage Registration Client List](file:///C:/Users/ABuccilli/AppData/Local/Microsoft/Windows/INetCache/Content.Outlook/2PO53Y4H/TSRC-PROD-017878).

If the Caremark.com link is enabled or does not display within the **Quick Actions** panel, review the CIF to determine if the client is Single Sign-On. **Do not** send a quick registration link if single sign on. These members cannot register through Caremark.com. They must utilize the client website to access Caremark.com. Refer to [Caremark.com - Single Sign-On Clients (SSO)](file:///C:/Users/ABuccilli/AppData/Local/Microsoft/Windows/INetCache/Content.Outlook/2PO53Y4H/TSRC-PROD-006534).

Early Registration-A Quick Registration email or text alert can be sent to members before their plan’s effective date (some exceptions apply).

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| Viewing and Sending a Quick Registration Link |

Perform the steps below to send a Quick Registration link:

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| **Step** | **Action** | |
| **1** | From the Member Snapshot Landing Page, navigate to the **Quick Actions** panel. Click the **Caremark.com** hyperlink.  **Notes:**   * Next to the **Caremark.com** link, view the status of the member’s Caremark.com account:  1. Registered 2. Not Registered   If the Client does not allow Quick Registration, clicking Caremark.comwill open a new browser window with the Caremark.com view. | |
| **If the Quick Actions link is…** | **Then when clicked…** |
| **Caremark.com - Registered** | A new browser window will open with the Caremark.com view. |
| **Caremark.com - Not Registered** | The user is taken to the Caremark.com Quick Registration Tab. Follow the prompts on the tab. The system is intuitive and will guide the agent. Proceed to the next step for additional direction. |
| **2** | **Sending the quick registration link:**  Click to select the **Email/Text** Delivery Method (Default or One-Time Email/Phone Number).    **Note:** A message in red font displays when the member has no Email/Phone Number address on file.   * Once email address/mobile phone number is successfully added in the **Contact Information** panel, the update is reflected as the **Default** Email or Phone Number on file.   If there is an email address/mobile phone number on file, the Customer Care Representative must verify it is correct with the member before sending the quick registration link.  **Result: The** **Send by Email/Text** button illuminates after the **Delivery Method** is selected.    Ask the members about their preference. Then click to select **Email** or **Text**.  **Notes:**   * The link can be sent via Email **or** Text, not both. * You can access the Caremark.com website at any time by clicking the | |
| **3** | **Customer Care Representative:**   * Inform the member that the email or text message should arrive within one to two (1 to 2) minutes. * If the email or text is not received within 5 minutes, ensure the alert is sent to the correct email address/mobile phone number. If so, advise the members to check their junk or spam mail folder.   Sending a second or third email or text message voids or expires the previous Quick Registration link. Click the Send by Email/Text button.  Notes:   * When an Email or Text has successfully sent the Registration link, the following message displays: “Registration link has been sent to your Email/Text.” * If the link is unsuccessful, the system will display an error message. You can retry sending the link by repeating the steps above. * The link in the Email or Text to complete registration expires after 72 hours.   **Email Registration form:**      **Mobile Phone Registration Text:**   * Advise the member to open the **Text** that states, “CVS Caremark: As you requested, here is a link to manage your RX’s online. Complete your registration now” and click the hyperlink. * **Note:** The registration link in the text expires in 72 hours. | |
| **4** | **Identity verification:**   * **Verify Your Identity:** Type Date of Birth and Last Name. Members who have a suffix after their last name in Compass (Jr, Sr, II, etcetera) are required to type their last name, a space, and the appropriate suffix.   **Example:** Smith Jr.   * If the member’s last name contains an apostrophe, hyphen, etcetera, in Compass, the member must type their last name as it is in Compass.   **Examples:** O’Brien or Smith-Jones   * Click **Continue**.   **Note:** If the member does **not** see the Verify Your Identity screen after selecting Complete Registration or Hyper link, suggest the member close their browser (all windows) and try clicking the link in the email/text again. Click **Continue** once the required fields are complete. | |
| **5** | **Contact Information:**  The members need to type their contact information. Click **Continue** once the required fields are complete.   * Members can enroll in text notifications and paperless documents available to them.     **Note:** The email address becomes the member’s Username, unless the member is prompted to create an alternative username because the email address is already in use. | |
| **6** | **Create a password**  Create a password and type the password a second time to confirm.  Note: Each family member must create a different password. The password must have:   * 10-32 letters * An uppercase and lowercase letter * A number   Click to check the **I agree to the Terms & Conditions** box and click.  Click **Continue** to complete registration. | |
| **7** | **Result:** Registration is complete.    For security reasons, members must sign in to the new account after registration. | |
| **8** | **One Time Passcode (OTP)**  On the first sign in, the member will be asked to confirm an OTP. The member has the option of receiving an OTP via email or mobile phone:    The member clicks **Send the code**.    **Notes:**   * The verification code sent to the member’s email or mobile phone number on file via text message is a **6-digit verification code.**   If the member closes their browser window within which the code is to be entered, when they go to their email or text alert to find the code, the member will need to Sign In again and request another code. Advise the members not to close the window where the code is to be entered before they Sign In. | |
| **9** | The member types the code and clicks **Confirm passcode.**    Members whose devices do not support Passwordless Sign-in will be logged into the main Dashboard. For members with devices supporting Passwordless Sign-in proceed to step 10. | |
| **10** | **Passwordless Sign-in**  Members utilizing devices that support Passwordless Sign-in may be presented with the Passwordless Sign-in enrollment prompt.   * Members will select **Sign in and enroll**     **Result:** Members will be taken back to the sign-in page  **Note:** If the members does not want to use Passwordless Sign-in they can select the **Return to previous screen** link. | |
| **11** | Members must sign in a second time and utilize an OTP in order to authorize the usage of the Passwordless Sign-in feature. (see steps 7-9)  **Result**: The member will be taken to the Set up passwordless sign-in page.   * The member will then select **Continue** to utilize either a passkey, facial recognition or fingerprint to sign-in to Caremark.com     **Note:** If the members does not want to use Passwordless Sign in they can select **Decline and go to dashboard**.  **Result**: Member is now enrolled into Passwordless Sign-in | |
| **12** | **Confirmation page:**  The member will receive confirmation of their enrollment and can utilize the Passwordless Sign-in feature to sign-in to Caremark.com | |

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| Single Sign-On (SSO) Only Error |

Some members must log into their primary benefit website and then access Caremark.com via **Single Sign-On (SSO)**. These members are not able to log directly into Caremark.com.

If a member from a SSO group tries to access Caremark.com directly, they will receive an authentication error, and the member might be directed to their primary benefits site to log in. The following message may also display: “You have requested access to a secure area of our website that requires you to be logged in. Please sign in to continue.”

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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)

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