# Compass - Customer Care Document Index

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**Description****:** Hyperlinks to Compass documents.

 **PeopleSafe Users:**  PeopleSafe is available. Notifications are provided by your leader about any changes to PeopleSafe availability.

 **If assisting Med D and EGWP callers** refer to[MED D - Commonly Used Work Instructions Index (089595)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=45cc9b47-1035-4597-b0ca-52d3109f8c8d).

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| Swivel Process |

Users **no longer need** to frequently swivel to PeopleSafe to assist callers. Though PeopleSafe is available, use Compass as the first method of resolution.

When swiveling from Compass to PeopleSafe, document the **PeopleSafe Call ID** in Compass at the end of the call. Refer to [Compass – Close an Interaction or Research Case (050011)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0296717e-6df6-4184-b337-13abcd4b070b).

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| Compass Reference Table |

 For a list of Compass known issues and current action steps to take when encountering each issue, including when it is expected to be resolved, refer to [Compass - Known Issues and Actions to Resolve (058313)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bf08f416-3cba-43b2-ab9a-0d8ff9489ae2).

**Notes:**

* The Compass screen must be maximized. For tips on how to adjust your computer screen to optimize it for Compass, refer to [Compass - Optimize the On-screen Experience (049985)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=2f702dca-38c5-4b46-be0b-8191ed5619e1).
* To access the Compass system, **refer to the appropriate work instruction:**
* **For Production:** [How to Access the Compass Production Environment (Log In, Log Out, Check for Open Cases) (050012)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=5a89e3bd-1ddc-4466-bd1b-93f0cbe17013)
* **For Training:** [How to Access the Compass Environment for Training (031259)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bc8c1e54-edff-403d-9014-76dc357d3401)

**Actions currently available in Compass:**

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| **Call Activity** | **Description** | **Impacted Documents** |
| Accumulations | The total amount of accumulations on a plan being paid toward Maximum Allowable Benefit (**MAB**), Maximum Out of Pocket (**MOOP**), and Deductibles. | * [Compass - Viewing Accumulations (050010)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c4fb8a09-f22f-49cd-a22d-71930039f08c) * [Compass - Corrections to Deductible, MOOP, and MAB (CDH Accumulations Task) (061925)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=247ab457-e428-4092-bde5-5b8aa2845389) * [Compass Health Reimbursement Account (HRA) (066757)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=81d80416-712c-4243-bf39-00a5869d7ce4) |
| Alerts   * Client * Mail * Member | Notes entered in Compass requested by the Client, Member, or Authorized Party. | [Compass - Viewing, Adding, and Editing Alerts (054194)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=36c941d2-25a6-4075-993d-f12deb31be18) |
| Alerts   * Order * Prescription | Comments entered for an order or prescription.  Information is view only. | [Compass - Mail Order History / Order Status (056369)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0ad0ab77-cb2e-4521-8f97-659304a0c8f8) |
| Alleged Non-Conformance and Call Pull Requests | Instructions for handling a claim or incident. | [Compass - Alleged Non-Conformance and Call Pull Requests (065109)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6e9f56f6-783d-472b-9deb-c259c1b2a224) |
| Appeals | An Appeal is a request for the plan to re-review a decision made regarding the coverage of a drug.  **Note****:** This document applies to **Commercial clients ONLY**, not MED D or EGWP. For Medicare Part D beneficiaries, review the Med D Client Information Form (**CIF**) for the client. Once you have confirmed that our **PBM** (Pharmacy Benefit Manager) handles the Appeals process, refer to [MED D - Coverage Determinations and Redeterminations (Appeals) Landing Page (004825)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1e7d7ad7-e1c1-4fa1-8258-215a1c0ff32b). | [Compass - Prior Authorization, Exceptions, Appeals Guide (063978)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=657ddfe3-27d1-4a21-8f51-8cbd3961001c)  **Note****:** No other document hyperlinks should be added to this section. |
| Authentication | To protect the privacy of a plan member’s information, the identity of the caller must be validated; however, general benefit questions **that do NOT pertain to a specific beneficiary** can be answered without authenticating the call. | * [Universal Care - Caller Authentication (004568)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bcb8da72-5501-4631-b9fd-fe675bc4a1fd) * [Compass - Guided Caller Authentication (050163)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=80476f74-7dca-4548-bf35-185ca8d45c13) * [Universal Care - Consultative Call Flow (CCF) Process (095822)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c954b131-7884-494c-b4bb-dfc12fdc846f) * [Compass - Benefit Verification Specialist (BVS) / Insurance Specialist Call Flow (070412)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e18ec280-7230-4f3f-b628-6ee07c083ddd) * [Compass - Pharmacy Requesting Member ID (060419)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=fbcb5b8b-3e1e-40d9-8b05-33e034b54bf8) * [Compass - Different Client Codes (Multiple Cardholder) (062829)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0aa53076-4645-4729-b556-85221441a444) * [Compass - Same Client Code/Same Id# (Multiple Cardholders) (062788)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ca5e669f-5a25-486a-a4c9-ef6d8faced5a) * [Compass - Primary Interaction Reason (PIR) (064447)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b9a50365-4c4b-4157-8c7b-00f8e1e6b6f3) |
| Auto Refill Program | The Auto Refill Program (**ARP**) allows members to automatically receive maintenance prescription (**Rx**) refills at the appropriate time, without having to manually place the order. | * [Compass - Auto Refill Program (ARP) (056033)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f843bc3f-55cc-4223-b2fc-03aff60cdf4c) * [Compass - Auto Refill Program (ARP) Job Aid (057858)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=439ad6a8-9ed1-4450-a79e-e0e2ab0ff092) * [Compass - Mail Rx Refill/Renewal (Order Placement) (054262)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad3a7263-725b-4d5d-a2ec-440f1f30d79c) * [Compass - Obtaining a New Prescription (Rx) for the Member (New Rx Request) (054208)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a7684ce9-c2bc-4cbc-ab37-c1ffb7789706) |
| Backorder/Shortage/Not in Stock | Use when the member is unable to locate their medication due to backorder, shortage of supply or not in stock.  Information about the Lifeline Drug Shortage Support and steps to add the application (app) in Microsoft Teams. | * [Compass - Member Unable to Locate Medication at Mail Order or Retail (Back Order, Shortage, Not in Stock - NIS) (065451)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=47f1fc7c-d771-45ae-9de3-179ac312f222) * [Compass – Search for CVS Retail Inventory (Drug Shortage / Out of Stock) and View Claim Details (RxConnect) (066768)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c10d717e-f397-4f10-8fb6-3731cd856f5c) * [Compass – Requests for Specific Generic Manufacturer In and Out of Stock Process (062781)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d7bd64bc-a539-41b6-8928-3a1a02900560) |
| Benefits | General information about a member’s retail/mail order plan benefits such as copays, day supply, accumulations required, etcetera.  **Note****:** For detailed information, refer to the member’s CIF. | * [Compass - Introduction to the Benefits Tab (050035)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ee04522b-cf4f-4507-ba80-f17d09422936) * [Compass - Test Claims (050041)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=60c20ea0-1d07-46e3-809a-b54734b80fbe) |
| Bridge Supply | Provides information as to the functionality of offering a short-term supply (or bridge) of medication(s) to members through a CVS retail pharmacy. | [Compass - Bridge Supply (056367)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5ecd7b05-8aed-4dbd-b4ef-8cb4912a543b) |
| Call Documentation | Documentation is available in Compass.  **Interaction Cases** in Compass require documentation before closing the case.  **Research Cases** are view-only and should be used sparingly.  **Note****:** The notes made in Compass are viewable in PeopleSafe. | * [Compass - Adding Additional Case Comments to an Interaction Case (050039)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1d5dbe73-ba4e-4036-a6f2-3cc2f992fd68) * [Compass - Close an Interaction or Research Case (050011)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0296717e-6df6-4184-b337-13abcd4b070b) * [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) |
| Call Handling | Various call handling processes can be handled in Compass. | * [Compass - Basic Call Handling – Opening the Call, Call Hold, Warm and Cold Transfer (066076)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0) * [Compass – Outbound Guided Caller Authentication (066775)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a386ced-5dc4-4139-a0b3-9ceffb2431c9) * [Compass - Calling Issues Messaging Platform or Automated Outbound Calls and Do Not Call (057529)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3cfa0107-6faa-42eb-b203-c32ab42a4d96) * [Compass - Mail Order Calls Regarding Deceased Members (064870)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=84208228-6cf3-46fd-ae5a-14624e9f04c0) * [Compass - Handling Repeat Callers: Multiple Calls, Same Issue (057523)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ba08434f-a17e-41de-9428-33f453416a6b) * [Compass - Medication Recall and Replacement (057522)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1db6182e-301d-4325-bca0-988f6b1df06f) * [Compass - When to Transfer a Call to the Senior Team (057524)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7653e7c2-1a97-42a0-8a81-6267c72e1ca9) * [Compass - When to Transfer a Call to Participant Services (065666)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7cb043bf-e9cf-4ac5-ad81-af82fe55bd90) * [Universal Care - Caller Authentication (004568)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bcb8da72-5501-4631-b9fd-fe675bc4a1fd) * [Universal Care - Consultative Call Flow (CCF) Process (095822)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c954b131-7884-494c-b4bb-dfc12fdc846f) * [2025 WECare Companion Guide - WECare Quality Call Evaluation Overview for Care Representatives (062683)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=384f024c-c33b-426c-8a40-258ba6023d9d) * [Compass - Member Password on Account (066364)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0335bb9c-33ed-470b-bc3d-571217befb2c) * [Compass - Clinical Counseling Pharmacist After Hours Process (057978)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=73b19224-7602-4182-b37b-5111baceb889)      * [HIPAA (Health Insurance Portability and Accountability Act) Grid - CVS (028920)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce) |
| Caremark.com | Index of related documents. | [Caremark.com - Work Instruction/Job Aid Index (105672)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=8a2da44a-6336-454d-8deb-fca4a71ad69b) |
| Case History | Displays past notes, captured activity, and tasks that have been created.  **Note:** The View Activity equivalent in Compass is Case History. | * [Compass - View Case History (050043)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=da374707-39c7-4936-8a0b-a9d1d85bf537) * [Compass - Case Details Landing Page (049986)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7c445dcd-f511-4428-a015-5ce2f09178c4) * [Compass - Close an Interaction or Research Case (050011)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0296717e-6df6-4184-b337-13abcd4b070b) * [Compass - Reviewing Prescriptions and Orders the Member Accessed / Placed From the IVR (050162)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=de3a4333-2d9d-4540-8127-3b5ff6060beb) * [Compass - Member Journey (069284)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=41fda2d2-c43c-4a14-b3cb-62a251a04547) |
| Case Types | Outlines the difference between Research Cases and Interaction Cases. | [Compass - Research Case vs. Interaction Case Job Aid (073591)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=98eee8e1-48a7-4958-8811-6e670ac2c34e) |
| Close Stuck Tabs / Cases | Instructions to force close open/stuck tabs and close any open interaction case that may prevent users from being able to continue working in Compass. | [Compass - Close an Interaction or Research Case (050011)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0296717e-6df6-4184-b337-13abcd4b070b) |
| CIF | CIF is used to access client specific information needed to resolve the plan member’s inquiry. | * [Compass - Locating a CIF Using Auto Search (043888)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d9bd0fe8-fbb2-490c-a03c-c9eb7db15a71) * [Compass - Member Snapshot Landing Page (050036)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3b8c0f76-42f3-4cf5-8dc9-6f7c6f0d67fb) |
| Compounds | Procedures when a member is asking about a Compound prescription. | * [Compass - Handling Compound Calls – Care (058045)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=2945ebf6-3201-4a07-9fea-7fdfb27a7a06) * [Compass - Paper Claim Multi-Ingredient Compound Prescription (058046)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c5e05bf4-e050-4efc-a8df-6e1d51c513f0) |
| Coordination of Benefits | Allows the user to view, add, and edit the member's (active/inactive) Coordination of Benefits (**COB**) information, alternate insurance, and manufacturer copay assistance. | * [Compass - Viewing, Adding, and Editing Coordination of Benefits (COB) (058048)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=50aa7279-263d-4b4e-9905-096e4fa3f2a0) * [Compass - Manufacturer Copay Assistance Cards (063965)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=8eb849ae-eaa3-4d01-bbf8-195b9cd4bdbf) |
| Claims Landing Page | The Claims Landing page is an overview **allowing the agent to view:**   * Member’s claims on the Claims tab (Mail & Retail) * Mail Rx on Mail Rx tab * Status of new Rx on New Rx tab/ New Rx Request * Mail order history tab with all the orders on the member's account * Mail Order Tracking Numbers * Mail Order Payment History * Override /PA History * Member Resources (Formally known as Fulfillment) * Universal Identification (**UID**) Numbers * Expedite and Upgrade Mail Order Shipping | * [Compass - Claims Landing Page (049993)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c8f0ac8f-b076-4187-944d-2cf65b0ec799) * [Compass - Copay Mail Order Reverse and Reprocess Claim (058123)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bf4c270a-9562-4abf-9cea-dd6ee5f1293c) * [Compass - Copay Modifiers (056213)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1a96b31c-b13a-42f8-b9df-3575a93ecc6d) * [Compass - Third Party Processor Indicator for the Cost Saver Drug Pricing Comparison Program (057998)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e135e0c3-c5ff-4653-b8e6-2509f6e0690e) * [Compass - Pharmacy Search and Details (057995)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ede79ef0-e196-481c-9f1b-c4ea562d9025) * [Compass - Universal Identification (UID) Numbers (047813)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5092dadb-6c0e-43ca-aa97-db913507d14b) * [Compass - Expediting a Mail Order in Process and Upgrading Order Shipping (056372)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7c997e99-e6b0-43d8-9078-7bbe0ec848cf) |
| Client Program Offerings | This gives the agent the ability to view different programs offered to the member. | Compass - Client Program Offerings (057317) |
| Clinical Counseling |  | * [Compass - Clinical Counseling Pharmacist After Hours Process (057978)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=73b19224-7602-4182-b37b-5111baceb889) * [Compass - Alleged Switched Labels on Medication (062668)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=98f382a7-d68d-4e5b-a233-9e216f0e685a) * [Compass - Prescription Verification (062783)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b62e1001-0487-48a5-95b8-0ad63260b41a) * [Compass - Member Counseling by Pharmacist (Clinical Inquiry) (062780)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1a70bedf-a141-40f0-929b-9bef6d8c2e7c) * [Compass - When to Transfer Calls to Clinical Care (062778)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d2dab105-056c-45be-b28b-bfad61c60a2f) * [Compass - Intervention Changebacks (062768)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=2379cb90-2a49-4be2-a38d-6d66d10365fe) |
| Communication History | This will assist an agent when a member calls regarding a letter they received.   * Digital Communication * Retro Termination Letter | [Compass - Viewing Communications (056371)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c0238ae3-ea9b-4da2-b9c9-90c8d4ad62a8) |
| COVID | Talk Tracks to assist with handling calls related to general information, ordering and reimbursement for the COVID-19 at-home tests. | [Compass - COVID-19 At-Home Tests Talk Tracks (065971)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=48f84737-bf61-43ab-9d9e-8734d7b6ce7d) |
| Diabetic Programs & Supplies | Hyperlinks to documents with descriptions related to diabetic supplies and programs. | * [Diabetic Program & Supplies Index (049788)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=91eac667-77eb-4131-8351-979ec7e1ae2e) * [Compass - Assisting Members with Diabetes - Diabetic Supplies/Insulin and Test Claims (065559)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=43414c69-1088-471e-9224-a2528451c03d) * [Compass - Member Charged a Copay for Their Diabetic Supplies with Diabetic Bundling (Kits) (066344)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3fc545fe-60cf-43cd-8a7a-c6e2ebd93e15) |
| Downtime Procedures | Information on how to handle system issues, power outages, and other downtime procedures. | * [Compass and PeopleSafe - Downtime Procedures (027110)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9e6c6901-f053-4575-9238-3f1f68feea78) * [LDR: Customer Care Work from Home (WFH) Downtime Procedure Leader (018632)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=173e5944-f7d8-4023-9ddc-910ef899065f) |
| Drug Information | Refer to each document | * [Compass - Branded Generics (058132)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a165d4de-f489-4898-aea7-673e5cdf4749) * [Compass - Dispense as Written (DAW) Codes (057975)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=33a277e4-4c74-4317-8b79-40a4cf86b262) * [Compass - DAW (Dispense as Written) Cost Difference (058127)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=31e71d2c-57c0-4643-ab77-e99e3babf7d6) * [Compass - CVS Specialty Copay Plan Design Strategies (058047)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=61656868-2241-42ad-ac78-516f378f2a43) * [Compass - Controlled Substance Information (C2-C5) (062851)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=43924b4f-9576-4024-93db-2b594c89bb00) * [Compass - Controlled Substance State Laws (058033)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=76fe19d9-b159-43a4-9db5-077ba1f6a958) * [Compass - Identifying Controlled Substances (057979)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=52472a65-b1b1-4026-b85e-816a2c329d9e) * [Compass - Specialty Pharmacy (CTS - Caremark Therapeutic Pharmacy Services) Call Handling (058175)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=845064bd-8ae0-4d30-af0a-e21d6d81933c) * [Compass - CVS Caremark Formulary Drug List Index (065725)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f7e2615b-bebe-40a6-a0e2-6c74609ff4c0) |
| Drug Lookup | Allows the agent to locate and obtain information for medication.  **Note****:** Drug look up is conducted through the Test Claim functionality or the agent can click on the drug hyperlink of a processed claim. | * [Compass - Test Claims (050041)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=60c20ea0-1d07-46e3-809a-b54734b80fbe) * [Compass - Search for Prescription and View Prescription Details (049990)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b672049a-a159-42e5-a395-7bdb0ed24fd8) |
| Eligibility | Basic eligibility information for the member.  Status of the member (cardholder) in relation to the plan.  **Example****:** Alternate ID number. | * [Compass - CVS ID Error (062069)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7d6afcc6-2e2b-4660-8027-c40afbd8435f) * [Compass - Member Snapshot Landing Page (050036)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3b8c0f76-42f3-4cf5-8dc9-6f7c6f0d67fb) * [Compass - Member Search (050037)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44e71d7a-1b1c-4931-9089-d4161a72d114) * [Compass - Resolution of Eligibility Issues (062827)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cba9d073-9e46-4d90-b86f-4566793c40f3) |
| Emergencies | Information for handling emergency situations.  **Examples:** Call center emergencies, civil unrest, severe weather such as hurricanes, wildfires, etcetera. | * [Call Center Emergencies (058755)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7cbf7a7e-2479-43fc-8bb9-b1aefff2aed8) * [[Civil Unrest and Immediate Danger Process (048890)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=489925e8-2dfc-46b7-a40b-5c50e9278afe)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=489925e8-2dfc-46b7-a40b-5c50e9278afe) * [Compass – Disaster / State of Emergency Process (065969)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b83eb4f0-7e62-4a71-9f34-7eb1ebdbe231) * [Customer Care Work from Home (WFH) Call Center Emergencies (018628)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3f0beafc-0c03-4c61-853c-a09d6d3be278) |
| ePA (Electronic Prior Authorization request) | Information on how to send an ePA request. | [Compass - Initiating an ePA Request (055814)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18bb86b7-af5b-4f25-af23-9c635e8a0aa4) |
| Extra Care Cards | Provides ExtraCare Health Benefit (**ECHB**) procedures on how to request a replacement, terminate this benefit, linking health benefit to red card and resolving system errors including the discontinuation of the ECHB program for certain client members.  It also includes information related to the sunsetting of the ECHB. | [Compass - ExtraCare Health Benefit (ECHB) Program and ExtraCare Card Process (057003)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6a5e8bec-3cc9-40d4-8f35-23ad53be6291) |
| Exceptions | Guide to supporting members with Prior Authorizations (**PA**), Exceptions, and Appeals. | [Compass - Prior Authorization, Exceptions, Appeals Guide (063978)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=657ddfe3-27d1-4a21-8f51-8cbd3961001c)  **Note****:** No other document hyperlinks should be added to this section. |
| Five9 Login/Desktop Softphone | How to login to the Five9 Soft Phone for the Agent.  Provides agents with information about the Five9 CCaaS and provides instructions for using the Five9 Agent Desktop Softphone with PeopleSafe. | * [Compass - Log In (Login) and Out of Five9 (056724)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f143ae89-173a-4c0c-a2f4-0be0d45ad858) * [Compass - Five9 Agent Desktop Phone (056045)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad8f7284-fee0-4ae1-bbbd-d2cbe07a331f) |
| Formulary Drug List | Centralized index for all CVS Caremark drug lists, also known as a formulary. | [Compass - CVS Caremark Formulary Drug List Index (065725)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f7e2615b-bebe-40a6-a0e2-6c74609ff4c0) |
| Fraud | Provides procedures to resolve fraud cases where member accounts may have been charged due to fraud or other errors.  **Example****:** Pharmacy may have run the wrong person under the member’s insurance, or the member’s medication on another person’s insurance by accident. | [Compass - Reporting Alleged Fraud CCR (057131)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ba630879-142f-4c5a-89c6-50b5018fe3b6) |
| Grievances | Provides step-by-step instructions on how to formally report a complaint or concern for specific Clients and Lines of Business (LOB) to ensure the process is consistent, fair, and transparent for all parties involved. | * [MED D - Grievances in MHK Nitro (SSI PDP, SSI EGWP, Aetna EGWP) (040885)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=17bed7cd-40e8-4e83-83a8-9d742d2605f8)  * [MED D - Compass Grievances: CCR - First Call Resolution Documentation Templates (SSI PDP, SSI EGWP, Aetna EGWP) (068896)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=b7f5a139-be8a-493a-8155-3932709e086e) * [Compass MED D - How to File a Grievance in Compass (066742)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a1bfd5ce-4c26-4dbb-a851-188f548bdf81) * [Compass MED D - When to File a Grievance in Compass (066741)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=8895dffc-cf45-44d4-b795-c4d95f7bd555) * [Compass MED D - Viewing Grievance History in Compass (066743)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cf46f2f7-d40c-4c65-9155-a37d4075ca22) * [MED D - Transmission of Customer Care Fraud, Waste and Abuse (027643)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5ae3449c-89af-4b3c-b3e8-fe2d334ea7e1) * [MED D - Grievance vs. Coverage Determination - Decision Matrix (027480)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=06e8f82d-e7b7-4a60-9c81-3bf7c37aadbf) * [Compass MED D - Transition Fill Care Processes (061926)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=15daa63f-81c8-4c0d-a02d-36481155d042) |
| Health Engagement Engine (**HEE**) Opportunities | View HEE opportunities depending upon the client offerings. | [Compass - View and Present Opportunities from the Health Engagement Engine (HEE) (053429)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=511e28f5-2757-4292-8353-4e3cf171e180) |
| ID Cards | Outlines how to order an ID Card. | * [Compass - Member ID Card Replacement (057048)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b9f7ada1-cb61-410f-b7ad-34ac5f7f716e) * [Compass MED D - Medicare D Landing Page (061525)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a2168484-0af3-4e35-88f0-1110e61c4868) |
| Inventory (Retail) | Steps to search the CVS Retail Inventory and view claim details. | [Compass – Search for CVS Retail Inventory (Drug Shortage / Out of Stock) and View Claim Details (RxConnect) (066768)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c10d717e-f397-4f10-8fb6-3731cd856f5c) |
| Interactive Voice Response (**IVR**) Authentication | Steps to log in to Compass using Ping Federation, allowing Customer Care Representatives (**CCR**) to receive IVR authenticated calls. | * [How to Access the Compass Production Environment (Log In, Log Out, Check for Open Cases) (050012)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a89e3bd-1ddc-4466-bd1b-93f0cbe17013) * [Compass - Log In (Login) and Out of Five9 (056724)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f143ae89-173a-4c0c-a2f4-0be0d45ad858)      * [Registering and Using Your Token to Login to Cicso AnyConnect and CVS Health MFA (043627)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=239f8bde-d8ea-497d-88b9-3adbe48edce6) * [Universal Care - Caller Authentication (004568)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=bcb8da72-5501-4631-b9fd-fe675bc4a1fd) |
| Low or Out of Medication | Documents with information about supporting members who are low or out of medication. | * [Compass Medical Foods (062771)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=65b80609-a9b5-4272-8fa8-a1e0c969c1e3) * [Compass - PBM Error Expediting Mail Order Processing Time and/or Upgrading Order Shipping (062861)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3a367086-d68a-4202-baea-6b30dfa4aaba) * [Compass - Member Low or Out of Medication (063003)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=91f73b9d-e568-48dd-9ab4-88cb2654d4c9) |
| Mail Order Profile | * Ship Consent Hold preference * Dispensing Special Instructions * State ID Controlled Substance * Language Preferences * Preferred Shipping Method * Mail order Processing Options * Allergies * Diagnoses | * **Center Panel: Mail Order Profile** section of [Compass - Member Snapshot Landing Page (050036)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3b8c0f76-42f3-4cf5-8dc9-6f7c6f0d67fb) * [Compass - Dispensing Special Instructions (ScripTalk, Braille, Large Font, Signature Required, Language, Blister Packs) (053542)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7e45fb8b-f0e4-437e-9238-c8e37a504de8) * [Compass - Adding/Maintaining State ID on a Member’s Profile for Controlled Substances (CS) in Kentucky (054236)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=fb46e722-146e-40ab-b798-1800b5fc7d96) |
| Mail Order Payment History | Utilized to pay current balance and to track previous transactions.  Payment methods can be added, edited, or deleted from this screen. | * [Compass - Mail Order Payment History Screen (053927)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=9a66303e-62a1-4cb5-817c-ad14e91b0bc2)      * [Compass - Add, Edit, and Delete Mail Order Payment Methods (Credit Card & eCheck) (056289)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a1a67eb-a7b1-4ae5-bcfe-e986bbe4aa3d) * [Compass - Refund for a Mail Order Balance Credit (057888)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=99d5924f-b53e-42cc-a337-5edc94d30f77) * [Compass - Refund Stop Payment Check Reissue (061420)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f6f8404c-3eff-42f0-82d5-ffe3b5fa1b5f) * [Compass - Payment - Finding (Locate) a Payment and Unapplied Payments (056290)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=70c94821-78b7-4cc3-9070-ffc252362be7) |
| Maintenance Choice (**MChoice**) | Documents for Compass related to MChoice. | * [Compass - Handling Maintenance Choice Calls (062836)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=2caace6e-39db-4411-9813-86cc2997a67d) * [Compass - Maintenance Choice (MChoice) Rx Transfer (056032)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cc2503bf-62dc-4db1-ad98-abfe4e9e98d4) * [Compass - Maintenance Choice (MChoice) Opt Out (053799)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=071ddb5a-1f72-4cef-baa6-5164c512e782) |
| Manage/Resolve Diverts | Information and procedures where orders can be held for several reasons, such as payment, Future Fill, and Participant Services related holds. | * [Compass - Manage Diverts / Conflicts (Release Order) (056291)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d4ef5860-ef38-4ae9-afd8-a4cb0d1f12e6) * [Compass - Add, Edit, and Delete Mail Order Payment Methods (Credit Card & eCheck) (056289)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a1a67eb-a7b1-4ae5-bcfe-e986bbe4aa3d) |
| Mandatory Mail Order Pharmacy Fills | Information and instructions for Mandatory Mail Order Pharmacy fills which is a plan. | [Compass - Mandatory Mail Order Pharmacy Fills (065654)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3b60a22f-46f3-4a63-882c-1e8f680c2d8a) |
| Medical Foods | Information and procedures related to handling Medical Foods. | [Compass Medical Foods (062771)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=65b80609-a9b5-4272-8fa8-a1e0c969c1e3) |
| Member Demographics | Allows agent to view/update a member’s profile including address, phone, and email. | * [Compass - Add / Edit / Delete Email Address (053409)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e01087c4-421c-4330-bcb3-81cb8cb45762) * [Compass - Add / Edit / Delete Phone Number (053256)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c37d4289-63b2-4732-a35c-c411cc26a29c) * [Compass - Add / Edit / Delete Mailing Address (053255)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9cfb4422-7129-4bca-b1ea-f1d6fa964906) * [Compass - Obtaining an Email Address and Managing Messaging Platform (MP) Notifications (054195)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=16d97031-aab3-4e30-b5d8-69ba322678d6) |
| Member Initiated Prior Use Exemption (**MIPUE**) Process for Formulary Exclusions | Procedures and information for clients implementing the MIPUE process for formulary exclusions. | [Compass - Member Initiated Prior Use Exemption (MIPUE) and Claims Derived Prior Use Exemption Process for Formulary Exclusions (065726)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=fef252ed-79c8-4bc0-b9fb-aa6374307c3b) |
| Member Resources | Provides directions that help determine when a Member Resources request should be processed through Member Resources automation in Compass. | [Compass - Member Resource Orders, Fulfillment Support Tasks, and Statement of Cost (SOC) Requests (056893)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=7bd8dfef-b12e-401e-9c4e-1e67e9a6a662) |
| Member Search | Guidance on searching, finding, and viewing a member’s profile in Compass how to resolve account inquiries that are not found or searchable. | * [Compass - Member Search (050037)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44e71d7a-1b1c-4931-9089-d4161a72d114) * [Compass - Restore the Search Function in Compass (050040)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=658df653-47c8-421c-b851-dd33e3276069) |
| Member Snapshot Landing Page | Outlines the Member Snapshot Landing Page and functionality found in Compass. | * [Compass - Member Snapshot Landing Page (050036)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3b8c0f76-42f3-4cf5-8dc9-6f7c6f0d67fb) * [Compass - Power of Attorney (POA) (053889)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1157152c-6ca0-42d3-8d0c-87135b979b2c) * [Compass - Forms Members Can Submit to Authorize Access and Release of Information for Their Account (053891)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=91b652db-c5b2-4769-b300-e1e2c95ec009) * [Compass MED D - Appointed Representative Form (AOR) or Power of Attorney (POA) (061884)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64c3fc62-48c3-4ad3-ae83-c736cebd521b) * [Compass - Viewing Communications (056371)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c0238ae3-ea9b-4da2-b9c9-90c8d4ad62a8) * [Compass - Caremark.com Quick Registration (057129)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0b9a88e0-b8ac-472a-925b-dfc9e016614a) |
| Messaging Preferences | Optimize method of contact with member by phone call, email, or text. | [Compass - Obtaining an Email Address and Managing Messaging Platform (MP) Notifications (054195)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=16d97031-aab3-4e30-b5d8-69ba322678d6) |
| Mixed Medication / Incorrect Medication Dispensed | Process for if a member calls Customer Care to report that the medication they received was not what was prescribed or expected.  Process when a member receives a generic medication but prefers brand medication.  These requests are only honored if within 180 days from ship date, with the ship date being counted as Day 1. | * [Compass - Mixed Medication / Incorrect Medication Dispensed (065105)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6be243fa-1a1e-43bb-81d2-b28b3edcff17) * [Compass - Refusal of Generic Substitution (065145)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b2c517c7-2dd7-4c2d-bedf-e334789ffc49) |
| New Rx Request | Handling calls from a member or authorized party regarding a new prescription request.  Options the member can use to start a Home Delivery.  Enroll eligible members into ARP along with placing a New Rx Request. | * [Compass - Obtaining a New Prescription (Rx) for the Member (New Rx Request) (054208)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a7684ce9-c2bc-4cbc-ab37-c1ffb7789706) * [Compass - New Rx Request Scenario Guide (Popups, Warnings, and Written Prescription) (054354)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=8bf9e4c9-2459-48b1-b0e1-6079bf9e222d) * [Compass - Add, Edit, and Delete Mail Order Payment Methods (Credit Card & eCheck) (056289)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a1a67eb-a7b1-4ae5-bcfe-e986bbe4aa3d) * [Compass - Payment Fill and Bill (025493)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0d911c06-a035-4993-b59a-c848a7d96831) * [Compass - eFax or ePrescriptions (eRX, Escript) (062770)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=2daa28e2-82e3-4387-a6a3-c8d8f6f33099) |
| Order Placement (Refill / Renewal) | Initiate and place a refill/renewal for Rx’s on the **Mail Rx** tab. Enroll eligible members into ARP along with placing a refill.  Transfer Rx(s) to Current Account. | * [Compass - Mail Rx Refill/Renewal (Order Placement) (054262)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad3a7263-725b-4d5d-a2ec-440f1f30d79c) * [Compass - Add, Edit, and Delete Mail Order Payment Methods (Credit Card & eCheck) (056289)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a1a67eb-a7b1-4ae5-bcfe-e986bbe4aa3d) * [Compass - Extra Bottle Requests (061358)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=97ca8760-1811-469c-9627-ad42db9f6c1a) * [Compass – Requests for Specific Generic Manufacturer In and Out of Stock Process (062781)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d7bd64bc-a539-41b6-8928-3a1a02900560) * [Compass - Transfer Existing Rx to Another Account (Carrier-to-Carrier/Open Rx Transfer) (057128)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6763e5a4-e98e-47f0-8738-c79178ab685b) * [Compass – Editing and Cancelling Orders Awaiting an Order Number (057232)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=98a7a9d6-b7fc-4471-9168-f6e3c3d2a14a) * [Compass - Reviewing Prescriptions and Orders the Member Accessed / Placed From the IVR (050162)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=de3a4333-2d9d-4540-8127-3b5ff6060beb) * [Compass - Prescription (Rx) Transfer (053932)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1e31ea60-77a3-4bb9-a619-7340ebf57484) * [Compass - Payment Fill and Bill (025493)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0d911c06-a035-4993-b59a-c848a7d96831) |
| Order Status | Inquiring about the status of their prescription order.  Agents can do the following through the **Prescription Number** **hyperlink:**   * View Prescription Details * View Financial Details. * Discontinue Prescriptions. | * [Compass - Mail Order History / Order Status (056369)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0ad0ab77-cb2e-4521-8f97-659304a0c8f8) * [Compass - Cancel or Remove a Prescription (Rx) from an Order (056363)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9c43c276-a6a4-4481-880d-62b194600f02) * [Compass - Discontinuing a Prescription (Rx) in Order Details (056370)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a0396fd5-8224-4c89-b673-49071e64cab1) * [Compass – Editing and Cancelling Orders Awaiting an Order Number (057232)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=98a7a9d6-b7fc-4471-9168-f6e3c3d2a14a) * [Compass - Add, Edit, and Delete Mail Order Payment Methods (Credit Card & eCheck) (056289)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a1a67eb-a7b1-4ae5-bcfe-e986bbe4aa3d) * [Compass - Doctor Phone Call Request (DPC) and Delayed Prescriber Response (058100)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a635ef88-4180-46fd-a161-5b4605b8b3fe) * [Compass - Stop Tote Requests (057999)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a4299650-04b0-46ee-b152-84f81ee81658) * [Compass - Split Order (061806)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=2d2151fd-0d2b-48aa-9882-93eed75e7fd5) * [Compass - Call Handling - Return to Member (RTP) (062799)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=549b9d75-54bd-469e-80f1-40703ff9be9f) * [Compass - Identified as Duplicate Archive Error CCR (062838)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0b2c83da-f6be-4d4a-83cd-ce3d6a537bd3) * [Compass - Viewing the Client Financials Screen (065175)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3418058a-1e7c-47f8-8071-99a07902d3ea) |
| Order Reships | Process to initiate and complete a Reship from an order that has already been shipped. | [Compass - Order Reships (057985)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a6851523-18b2-4009-90a5-8fd53ee9669b) |
| Override | Overrides are a way to bypass plan edits in the plan design to allow claims to process when they would normally be rejected. | * [Compass - Plan Benefit Override (PBO) Guide (061708)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44418b02-7e70-41cc-bb2e-bb38164a951f)   **Note****:** No other override documents should be added to this area Utilize the hyperlink listed to access all related documents.   * [Compass - Rejection Codes and Resolutions (Reject 01 - Reject ZN) (067649)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=104c3318-95ba-42e2-bd05-17877b0a8045) |
| Override History | Ability to view previous overrides on a member’s account. | [Compass - Override / PA History (050015)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=74e6ea18-d5de-4ba0-9529-5d452f814e93) |
| Paper Claims | A request for reimbursement of prescription costs submitted to the adjudication process. | * [Compass - Member Snapshot Landing Page (050036)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3b8c0f76-42f3-4cf5-8dc9-6f7c6f0d67fb) * [Compass - Identifying Paper Claims (050034)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c281dde6-a86e-451a-8828-9f2b98c17bb9) * **Search by Retail Rx** section of [Compass - Member Search (050037)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44e71d7a-1b1c-4931-9089-d4161a72d114)      * [[Compass - Paper Claim Submission Job Aid (058275)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ef66046d-494d-4892-9e2a-5bc437966f95)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ef66046d-494d-4892-9e2a-5bc437966f95) in the **Paper Claims Forms** section |
| Paper Claim Viewer | Provides instructions to determine the status of a paper claim submitted by the members where they paid **out-of-pocket** for a prescription purchased. | * [Compass - Identifying Paper Claims (050034)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c281dde6-a86e-451a-8828-9f2b98c17bb9) * [Compass - Paper Claim Multi-Ingredient Compound Prescription (058046)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c5e05bf4-e050-4efc-a8df-6e1d51c513f0) |
| Payment Dispute | Use when a member questions a payment on their account and how to submit a Payment Dispute Support Task | * [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) * [Compass - Viewing the Adjustments/Recoupments Screen (053410)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=54e7a6e7-1d85-44ad-8a42-521027c14f37) |
| Payment Methods | View, add, edit, and delete the member’s methods of payment.   * Fill and Bill is now an available payment option (Client specific) * Copay Installments is now an available payment option (Client specific) | * [Compass - Add, Edit, and Delete Mail Order Payment Methods (Credit Card & eCheck) (056289)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a1a67eb-a7b1-4ae5-bcfe-e986bbe4aa3d) * [Compass - Copay Installment Payments (057183)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=14e13366-0206-4670-9b6f-15de902471d6)   **Note:** Information on how to select **Fill and Bill** and **Copay Installments** as payment methods are available in the Order Placement and New Rx Request **work instructions below:**   * [Compass - Mail Rx Refill/Renewal (Order Placement) (054262)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad3a7263-725b-4d5d-a2ec-440f1f30d79c) * [Compass - Obtaining a New Prescription (Rx) for the Member (New Rx Request) (054208)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a7684ce9-c2bc-4cbc-ab37-c1ffb7789706) |
| PBM Hold | Provides the process when our PBM Mail Service personnel may place a prescription on hold when circumstances prevent it from being filled.  Includes examples of common conflicts that will result in the prescription being placed on hold and ways for Customer Care to resolve the issue if possible. | [Compass - PBM Hold (064830)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3097f4b1-2e87-4b8a-9c5e-af1c85b01bc7) |
| Pharmacy Lookup | Allows the agent to locate and obtain information for In-network retail pharmacies.  **Note****:** Pharmacy look up is conducted though the Test Claim functionality. | * [Compass - Pharmacy Details (046365)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bc3ef4e7-2ae2-4ed2-b512-a36d701594cf) * [Compass - Test Claims (050041)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=60c20ea0-1d07-46e3-809a-b54734b80fbe) * [Compass - Determining the Reason for Contracted Medication Price Changes (067612)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c559e3ac-63d0-46b5-a6e4-7b4f205c60c6) |
| Pharmacy / Provider Lock | Outlines Pharmacy/Provider Locks details in Compass. | [Compass - Pharmacy/Provider Locks (050038)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=8c0f0bf6-9b40-482b-8886-ceb43b075f81) |
| Prescriber Holds / Delayed Prescriber Response | Information related to the Delayed Prescriber Response that involves the handling of incomplete prescriptions requiring clarification from the prescriber.  The two types of Delayed Prescriber Response Hold are Prescriber Hold Until and Prescriber Indefinite Hold. | [Compass - Delayed Prescriber Response/Prescriber Holds (057051)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=101f5c27-321e-427d-86e2-715d4e62b660) |
| Prescription Holds | Process for placing a Rx In Process on hold. It also provides the processes for releasing an Rx from Hold Until and from Indefinite Hold. | [Compass - Placing/Releasing a Prescription (Rx) in Process on Hold/From Hold (056362)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=46478c4b-48ae-4502-b66c-222e1ca37ce3) |
| Prior Authorization (**PA/ePA**) | Guide to Prior Authorizations, Exceptions, and Appeals.  **Note:** This applies to **Commercial clients ONLY**, not MED D or EGWP. For Medicare Part D beneficiaries, review the Med D CIF for the client. Once you have confirmed that our PBM handles the Appeals process, refer to [MED D - Coverage Determinations and Redeterminations (Appeals) Landing Page (004825)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1e7d7ad7-e1c1-4fa1-8258-215a1c0ff32b). | [Compass - Prior Authorization, Exceptions, Appeals Guide (063978)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=657ddfe3-27d1-4a21-8f51-8cbd3961001c)  **Note:** For information on how to send an ePA request, please review the ePA section of this document.  **Note****:** No other document hyperlinks should be added to this section. |
| Privacy Records | * View Power of Attorney (**POA**) information. * Provides information on how to address a member request for a Notice of Privacy Practice or information on how to contact the Privacy Office/Officer. | * [Compass - Forms Members Can Submit to Authorize Access and Release of Information for Their Account (053891)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=91b652db-c5b2-4769-b300-e1e2c95ec009) * [Compass MED D - Appointed Representative Form (AOR) or Power of Attorney (POA) (061884)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64c3fc62-48c3-4ad3-ae83-c736cebd521b) * [Compass - Power of Attorney (POA) (053889)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1157152c-6ca0-42d3-8d0c-87135b979b2c) * [Request for Privacy Office/Officer (002186)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1b12e088-b8a4-4093-94b4-e8a3093d0398) |
| Quantity Versus Time limit (**QVT**) Calculations | QVT is a tool used when a plan allows a maximum quantity of medication to be filled within a specified time frame, this is referred to as a Quantity Versus Time limit (**QVT**) or a Therapy Protocol Quantity Limit.  The Dosage Calculator tool is used to help determine when a Dose Change override is allowed. | * [Compass - Calculating Quantity for Packaged & Non-Packaged Medications (050982)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=fef7af0d-800c-49b2-9b3d-1831aef5ac2d) * [Compass - Test Claims (050041)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=60c20ea0-1d07-46e3-809a-b54734b80fbe) * [Compass - Dosage Calculator (049981)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=48890281-24de-4328-8cf9-40a84eda864c) |
| Reship | Process to initiate and complete a Reship from an order that has already been shipped. | [Compass - Order Reships (057985)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a6851523-18b2-4009-90a5-8fd53ee9669b) |
| Reverse Transmission | Pharmacy may request assistance in reversing a claim. | [Compass - Reverse Transmission CCR Process (050134)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=05e19ecb-3da9-435d-945e-c1a7b3587706) |
| Submission Clarification Code (**SCC**) Codes | A numeric code used by pharmacies that allows for overrides without the assistance of a CCR.  CCR receives the SCC code from a reject claim.  Detailed SCC Override Information | * [Compass - Plan Benefit Override (PBO) Guide (061708)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44418b02-7e70-41cc-bb2e-bb38164a951f)   **Note****:** No other override documents should be added to this area. Utilize the hyperlink listed to access all related documents.   * [Compass - Rejection Codes and Resolutions (Reject 01 - Reject ZN) (067649)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=104c3318-95ba-42e2-bd05-17877b0a8045) |
| Shipping Guidelines | Tracking information and costs associated with shipping orders. | [Compass - Shipping Guidelines and Fees (053427)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e77f513c-0e5e-4aaa-b674-de935ed25901) |
| Statement of Cost (**SOC**) | Outlines how to order a Statement of Cost. | * [Compass - Member Resource Orders, Fulfillment Support Tasks, and Statement of Cost (SOC) Requests (056893)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7bd8dfef-b12e-401e-9c4e-1e67e9a6a662) * [Compass - Duplicate EOB Statements (057980)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d6bab506-610d-42f2-a363-f36e0d32feb9) |
| Submitting Feedback | Agent can submit feedback in Compass regarding process improvement, changes, enhancements, etcetera. | [Compass - User Feedback: Reporting System Issues and Submitting Feedback on the Compass Application (047004)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=2f9c9c9a-47ce-4600-afae-1c16ef9b7808) |
| Support Tasks | CIF may instruct the agent to submit a Resolution Manager (**RM**) Task via PeopleSafe, do not submit the task via PeopleSafe, use Compass. | * [Compass - Support Task Types and Uses with Turnaround Time (TAT) (056365)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4ac2747d-17b4-4986-8c4e-3bdaca477cf1) * [Compass - Support Task Types and Uses List (058147)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6753488f-3996-45d9-88ba-257575369a98) * [Compass - Create a Support Task (050031)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6) * [Compass - Edit or Cancel a Self-Submitted Support Task (050032)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4ad65197-fe9e-4288-b5e3-23c771eff267) * [Compass - View Support Task History (050044)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1674c564-fc41-42ad-a7c2-f3b610716cba)   **Additional Documentation:**   * [Compass - Split Payment (More Than One Method of Payment) for an Order (054227)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9da60cbd-81ae-4908-9c7e-7b8fbb59aa39) * [Compass - Manage Diverts / Conflicts (Release Order) (056291)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d4ef5860-ef38-4ae9-afd8-a4cb0d1f12e6) * [Compass - Member Resource Orders, Fulfillment Support Tasks, and Statement of Cost (SOC) Requests (056893)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7bd8dfef-b12e-401e-9c4e-1e67e9a6a662) * [Compass - Courtesy Retranslation Support Task (Bulk Up, Downsizing an Rx, and Variable Fill Requests) (058179)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a11f9225-37ee-4af0-83bf-7d492b2006cf) * [Compass - Return Order Request (Formerly Refund Copay Credit/Mail Tag Request) (058097)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9e7e3115-e2d6-41c6-bd9e-83a67e0ec196) * [Compass - Prescription (Rx) Transfer (053932)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1e31ea60-77a3-4bb9-a619-7340ebf57484) * [Compass - Offline Refill (056373)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=db21add8-521c-4f56-806b-2bd60acc39ed) * [Compass - “Adopt-A-Bene” United Mine Workers of America (UMWA) Support Task (057976)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=742c2205-fc84-4fbd-b3de-a66976067058) * [Compass - Multiple Birth Task (062774)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cef86941-5711-480f-94e8-c33d5800ba33) * [Compass - Prescription (Rx) Copy Request (062870)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e8a4272a-9dd0-4b49-a169-db4f728150a2) * [Compass - Non-Childproof or Easy Open Cap Requests (063812)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=479f7303-84ce-46e4-b7c3-9f890ea26d92) * [Compass - Account Executive Consideration Support Task (AE Support Task) (061419)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c45b56be-1ed1-4954-8487-3781fd7d1d55) |
| Test Claims  (Including EGWP) | Allows the Customer Care Representative to run a mock adjudication.  Include generic on Brand Name searches.  Viewing alternatives on the Test Claim Table. | * [Compass - Test Claims (050041)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=60c20ea0-1d07-46e3-809a-b54734b80fbe) * [Compass - Calculating Quantity for Packaged & Non-Packaged Medications (050982)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=fef7af0d-800c-49b2-9b3d-1831aef5ac2d)      * [Compass - Test Claim Features (049987)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=811fb894-3107-4895-ad0e-cea9dc002b8e) * [Compass - Viewing and Running Test Claims for Alternative Rx(s) (056849)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b3dbfb44-1c9e-47a6-b8f4-6010f553731b) * [Compass - Using Universal IDs for Test Claims (068254)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1b462f06-57ce-453e-9e35-a6eca199106d) * [Compass - Request Drug Cost Comparison Letter (TiC – Cost Estimator Tool) (062180)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c4c7f33f-13c4-46c7-b4eb-7d734a93e792) |
| Tiering Information | Steps to locate indication of a drugs tier. | * [Compass - Introduction to the Benefits Tab (050035)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ee04522b-cf4f-4507-ba80-f17d09422936) * [Compass - Claims Landing Page (049993)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c8f0ac8f-b076-4187-944d-2cf65b0ec799) |
| Universal ID (**UID**) | The **UID** (Universal Identification Number) uses Follow Me Logic (**FML**) to track a member’s claims from carrier to carrier. | * [Compass - Viewing Claims Across Carriers (053916)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ee4574ee-40b3-4259-ac68-ff6baa69c8a1) * [Compass - Universal Identification (UID) Numbers (047813)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5092dadb-6c0e-43ca-aa97-db913507d14b) |
| Unclaimed Property (**UCP**) | Steps to use when a caller needs assistance with a Due UCP letter.  Unclaimed Property is any reimbursement check issued to a payee that has been uncashed for over two years.  Our business, affiliated companies, and the State of California will issue a Due Diligence letter to notify the customers of their uncashed checks. | [Compass - Unclaimed Property/Checks Not Cashed (062887)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=589a4793-e6c7-472a-a95d-1e7dd43e0f3b) |
| Vaccines | Information on how to check coverage for vaccinations and assist pharmacies with rejected claims. | * [Compass - Retail Pharmacy Vaccine & Flu Shot Administration (069531)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=43d5b60c-07df-4842-81c9-7de9ca0135be) * [Vaccines (008966)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=442488f7-4aaf-4f47-b1bf-97809946f909) |
| View Activity | Navigating the View Activityscreen located in PeopleSafe that includes information about our contact with a member and the actions taken. | [Viewing Activity in PeopleSafe and Compass Interactions (046145)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=318e35f6-03d7-4aeb-92c1-8bf24ca8d851) |
| View Additional Coverage | Allows the agent to view if the member has additional coverage from another carrier. | [Compass - View Additional Coverage (050042) - Expired](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=77e166f8-02ac-4c9f-8a3f-321cab8af5f8) |
| View Caremark.com | Quick registration for Caremark.com. | [Compass - Caremark.com Quick Registration (057129)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0b9a88e0-b8ac-472a-925b-dfc9e016614a) |
| Waiving or Crediting Shipping Fees | Process for determining to waive or credit expedited shipping fees for a caller. | [Compass - Waiving Shipping Fees (073541)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4884979f-78c9-4dbe-9d11-2921104432cb) |

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| PeopleSafe vs. Compass Terms |

The following table provides a quick view of the Compass equivalents for existing PeopleSafe screens/functions:

|  |  |
| --- | --- |
| PeopleSafe | Compass |
| Account Balance | Accumulations |
| Auto Documentation | Service Request |
| Auto-Doc/Capture Activity | Service Requests |
| Available Overrides & Override Summary | SCC Overrides |
| Confirmation Number | Case Number |
| Comments / Order Level Comments | Alerts |
| Electronic Check | Electronic Check (eCheck) |
| Explanation of Benefits (FEP Item) | Reimbursement Search |
| Find a Communication | Search for Communication |
| Find Docs MO/MM/AR | Retro Termination Letter |
| Fulfillment | Member Resources |
| High Priority Comments | Member Alerts |
| Log Activity | Close Case |
| Main Screen – Retail Transactions | Claims Landing Page |
| Main Screen – Mail Transactions | Mail Order History tab |
| Maintain Patient Profile | Mail Order Profile |
| Maintain Payment Options | Mail Order Payments |
| Manual Refill | Offline Refill |
| Order Card, Kit | ID Cards |
| Order Placement | Mail Rx tab |
| Plan Summary | Benefits |
| Primary/Name Search | Search by Member |
| Refill Status button | In Process Orders |
| Resolution Manager (RM) | Support Tasks |
| Retail Transaction | Search by Retail Rx |
| Secondary/Unique Search | Search by Mail Order/Internal ID |
| Session | Case |
| Stop See Comments | Mail Order Alerts |
| Transaction History | Current Balance/Mail Order Payment History |
| View Activity | Member's Recent Cases |
| View Claims by UID | View Claims Across Carriers |
| View Transmission | Transmission Details |
| Virtual Pharmacy: Mail Pharmacy address | Virtual Pharmacy: Mail Rx tab |

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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)

[MED D - Commonly Used Work Instructions Index (089595)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=45cc9b47-1035-4597-b0ca-52d3109f8c8d)

[Compass - Icon Legend (045776)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ca204f46-bc7d-4f82-8f13-93a0850002cd)

[Compass - When to Transfer Calls to Physician Contact (Formerly Doctor Calls) (065970)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=88c865b6-ca4a-437f-b486-ad4d5642119c)

[Phone Numbers (Contacts, Departments, Directory, Addresses, Hours and Programs) (004378)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f22eb77e-4033-4ad9-9afb-fc262f29faad)

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