# Compass - Editing an Override

[Edit an Override from the Override Results Screen](#_Toc171602770)

[Edit an Override from the Override/PA History Screen](#_Toc171602771)

[Related Documents](#_Toc171602772)

 **Description:**Process to edit overrides, including editing an override from the Override Results screen and from the Override History screen. Case must be opened as interaction to allow an override to be edited.

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| Edit an Override from the Override Results Screen |

**Note:** For all EGWP and Dual Demo accounts, the override must be placed on both accounts.

To edit an override when you are not on the Override Results Screen, refer to [Edit an Existing Override from the Override/PA History Screen](#_Edit_an_Existing).

Perform the following steps to edit an override from the Override Results screen after having entered an override:

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| **Step** | **Action** | | | |
| **1** | From the **Override Results** screen (displays after creating/editing an override), review the **Reject Code** and **Reject Message** fields. | | | |
| **If…** | | | **Then…** |
| **Successful** AND Test Claim Status is **ACCEPT** | | | No edits are required.   * For **Retail Claims:** Advise the caller to have the pharmacy resubmit the claim. * For **Mail Order Claims:** Assist with an Early Refill. Refer to [Compass - Plan Benefit Override (PBO) and Early Refill at Mail Order (061702)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f90d2d18-98d1-4ba4-b8c1-9138922c065d). |
| **Successful** AND Test Claim Status is **Denied**  OR  **Denied** | | | Proceed to next step. |
| **2** | Navigate to the **Common Override** fields section, edit each field as needed, and click **apply**.  **Notes:**   * Refer to the client CIF for client-specific override rules. * Refer to [Compass – Override Reference Table (061701)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=922592a2-b585-40da-9acb-f128fed94c62) for override guidance. * For clients with Maintenance Choice, for early fill at retail (POS) for 83 days’ supply or less, change the Maintenance Choice option to **Yes**. * For ALL early fills, ensure the refill Limits and DUR options are set to **Yes**.   **Reminder:** When the override has been applied to multiple medications, ensure you are editing the correct medication override by clicking the appropriate override ID. If multiple override IDs need to be edited, make the necessary changes, and click **Apply**. The medication should now display Override Status **Successful** and Test Claims Status **ACCEPT**.    Do not edit the **Maximum Days’ Supply** field unless the CIF indicates that Maximum Days’ Supply for that override type has a limitation (defaults to appropriate Days’ Supply for most plans). | | | |
| **3** | Proceed depending on the **Override Status** and **Test Claim Status** shown in the Override Results window. | | | |
| **If Override Status is…** | **And Test Claim Status is…** | **Then…** | |
| Successful | ACCEPT  or  Blank | * Click **Finish**.   **Result:** The Override History screen displays, and the edited override(s) will be viewable in the list of overrides. | |
| Successful | DENIED | Click **Finish**.  **Note:** Special Handling flags may need to be flipped. Proceed to [Edit an Override from the Override/PA History Screen](#_Edit_an_Override) for details on flipping Special Handling flags. | |
| Denied |  | Consult work instructions and retry the edit.  If the error persists, void the override, and contact [Senior Team (057524)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7653e7c2-1a97-42a0-8a81-6267c72e1ca9) for assistance. | |
| **4** | Advise the caller to have the pharmacy resubmit the claim. | | | |

[Top of the Document](#_top)

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| Edit an Override from the Override/PA History Screen |

**Note:** For all EGWP and Dual Demo accounts, the override must be placed on both accounts.

Perform the following steps to edit an existing override from the **Override/PA History** screen:

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| **Step** | **Action** |
| **1** | From the Claims Landing page, in the Quick Actions menu, navigate to the **Override/PA History** screen and locate the desired override.  Graphical user interface  Description automatically generated |
| **2** | Click the **ID** hyperlink for the specific override.  Table  Description automatically generated with medium confidence  **Result:** A new PA/Override tab is launched and displays **Override Details** for the specific override. |
| **3** | Edit the appropriate fields based on the type of override. Refer to [Compass – Override Reference Table (061701)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=922592a2-b585-40da-9acb-f128fed94c62).  **Field sections that may need edited:**   * **Common Overrides** * **Requires Special Handling** / General tab * **Requires Special Handling** /Range Data tab   **Notes:**   * If sections are collapsed, click the dropdown arrow to expand each section. * If the following message displays: “Client has Override/PA Layering, edits may not apply based on this Reason Code.”, review the CIF and announcements in theSource. If no specific direction, transfer the call to the Senior Team for assistance.   **Exception:** The **Ignore PA Status** field cannot be edited in this view. Updates to this field can only be made from the **Create Override/PA** screen.  For more information about the field sections, refer to [Compass - Override / PA History (050015)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=74e6ea18-d5de-4ba0-9529-5d452f814e93). |
| **4** | Clickthe **Save** **Changes** button at the top of the screen.  **Results:**   * If successful:   + The following message displays: **The update was successfully applied for <SF #>.**   + The **Override History** screen displays, and override(s) will be viewable in the list. * If unsuccessful, attempt to update the override fields. Refer to Compass – Override Reference Table. * If the error persists, contact Senior Team.   Table  Description automatically generated with medium confidence  **Note:** For applying an override to secondary coverage (EGWP, Wraps, and Dual Demo accounts), refer to [Compass – Override for Secondary Coverage (061700)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a5f2957c-56aa-435c-a83a-5e9e59d62c8c). |
| **5** | Proceed according to the type of claim:   * **Retail Claims:** Advise the caller to have the pharmacy resubmit the claim. * **Mail Order Claims:** Assist the caller with an Early Refill at Mail. Refer to [Compass - Plan Benefit Override (PBO) and Early Refill at Mail Order (061702)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f90d2d18-98d1-4ba4-b8c1-9138922c065d). |

[Top of the Document](#_top)

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| Related Documents |

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

[Compass – Plan Benefit Override (PBO) Guide (061708)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44418b02-7e70-41cc-bb2e-bb38164a951f)

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

[Top of the Document](#_top)

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