**Compass - Plan Benefit Override (PBO) and Early Refill at Mail Order**

[Entering an Override at Mail Order](#_Toc202251963)

[Submitting an Early Refill Request through Mail Order](#_Toc202251964)

[Scenario Guide](#_Toc202251965)

[Related Documents](#_Toc202251966)

**Description:** Steps to place an override for a medication at Mail Order as well as explains the process to create an Early Refill at Mail Order task once an accepted override is on file.

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| Entering an Override at Mail Order |

 Ensure the plan is active; an override cannot be entered on an inactive plan.

*  The following message will display on **inactive plans****:** “Expired eligibility period. No benefits available.”
*  The following message will display on **future dated plans:** “Future eligibility period. No benefits available.”
* Run a Test Claim to ensure the override is appropriate.
* Check for existing PBOs or PBO Support Task.
* Refer the CIF for client direction on what overrides are allowed.

**Note:** For Retail medications, refer to [Compass – Plan Benefit Override (PBO) at Retail (061703)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c603121d-bba5-4ec2-97ab-5b047f1c3ab1).

**Controlled Substances:** If allowed by the CIF, an appropriate override will allow the pharmacy to process the claim on the **plan**. The member may not be able to fill the prescription based on State/Federal law.

Perform the steps below to enter the override:

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| **Step** | **Action** | |
| **1** | From the Claims Landing Page, select **Create Override/PA.**  A screenshot of a computer  AI-generated content may be incorrect.  **Result:** The Create Override/PA screen displays.  If the CIF directs CCR to Submit Support Task for Approval, refer to [Compass - Create a Support Task (050031)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6).  **Reminder:** Before submitting a PBO Support Task, ask if the member can wait up to 3 (three) business days, and provide turnaround time.   * **If yes**, submit the PBO Support Task. * **If not**, contact the Senior Team to determine if the override is a procedural transfer.   **Note:**  Do not complete an early refill request once the PBO Support Task has been completed. The support task team will automatically complete the early refill request (if required) once they have completed the PBO request. | |
| **2** | In the **Select Override Type for…** section, select the correct option from the **Override Reason** drop-down menu or search Reason Code in the dropdown.   * To ensure the appropriate override reason is entered, refer to [Compass – Override Reference Table (061701)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=922592a2-b585-40da-9acb-f128fed94c62).     **Notes:**   * Agent field defaults to **P-Plan Sponsor** unless the caller is an authenticated Retail Pharmacy then it will default to H-Pharmacy Help Desk. * Agent field is editable as identified in the CIF. * The **GPI / NDC** field automatically populates based on the client requirements (unless CIF shows otherwise). This field is editable if required. * On rare occasions, the CIF may direct you to enter a partial GPI override. **Review the CIF for any specifics related to overrides.** * If a “Controlled/Sensitive Drug Select” pop up display, refer to Controlled / Sensitive Drug section of [Compass – Plan Benefit Override (PBO) Guide (061708)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44418b02-7e70-41cc-bb2e-bb38164a951f). * If an override has been entered within the last 365 days with the same reason code, the **Previous Override/PA** window displays.    + Click the blue **Override ID** hyperlink to view details of the previously entered override on the Edit Override Detail screen. If the override is expired, the Edit Override Detail screen will be in read-only mode.   A screenshot of a computer  AI-generated content may be incorrect. | |
| **3** | Edit fields in the **Select Override Type for…** section. Refer to [Compass – Override Reference Table (061701)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=922592a2-b585-40da-9acb-f128fed94c62) as needed.  **Reminder:** For certain overrides, notes are required to be entered in the Authorized Notes section. Refer to [Compass – Override Reference Table (061701)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=922592a2-b585-40da-9acb-f128fed94c62) and CIF.  For some clients, the following is auto updated:   * The Effective and Expiration dates equal today’s date for both dates. * The system sets the Ignore Pa Status to N-No. * The system sets the Drug Status to A-Plan Default.   **Do** **not** make any changes to these fields unless directed by the CIF. **Refer to the client CIF for specific override rules.** | |
| **4** | Determine if the override applies to multiple prescriptions.  **Notes:**   * Agents are allowed to create up to **10 overrides** at a time between the **Claims History**, **Historical Test Claims** and **Add Drug** sections. * The **Override** **Effective Date** and **Override** **Expiration Date** fields in the **Create Override/PA** tab will default to 5 days for non-controlled Rx(s) and 3 days for controlled Rx(s): **Do not edit**, unless directed by the **CIF.**     **Notes:**   * Agents can filter **Claim History** using the **View Claim Status By** or **Show Last** drop down. * The **Claims History** table will display expanded with the ability to be collapsed. * The **View Claim Status By** dropdownfieldwill default to **Rejected** andinclude the following filter options; **Paid**, **Reversal**, **Rejected** and **All**. * The **Show Last** field will default to show **30 days** andinclude the following filter options include, **1 week**, **30 days**, **60 days**, **90 days**, **6 months**, and **2 years**. * If no claims are returned for a selected date range, message displays **No Rxs found that match your search criteria**. | |
| **If…** | **Then…** |
| Yes, applies to multiple prescriptions  Review the()icon for an important message regarding **Select Applicable Claims**. | From **Select Applicable Claims (max 10 drugs)**, in the **Claims History** section, select the boxes for each medication the selected override should be applied to, then click **Add to Override List** (button will be disabled until Rxs are selected).  **Note:**  Agents can utilize the **Historical Test** Claims and **Add Drug** sections to locate Additional Rx(s) in question. Refer to, Scenario Guide.  **Result:**  Rxs are added to the **List of Overrides to Create** section at the bottom of the screen. |
| No, does not apply to multiple prescriptions | From **Select Applicable Claims (max 10 drugs)**, in the **Claims Histor**y section, select the box for the medication the override should be applied to, then click **Add to Override List** (button will be disabled until Rx is selected).  **Note:**  Agents can utilize the **Historical Test** Claims and **Add Drug** sections to locate Additional Rx(s) in question. Refer to, Scenario Guide.  **Result:**  Rx is added to the **List of Overrides to Create** section at the bottom of the screen. |
| **5** | From the **List of Overrides to Create**, click **Create Override**(located in the bottom right) to complete the override.    **Result:** A test claim automatically runs in the background, and the **Override Results** screen displays.  **Notes:**   * If **Duplicate Drug** pop up displays, refer to [Scenario Guide](#_Scenario_Guide). * If Test Claims Status is **N/A**, manually run test claim for results.   + Hovering over the N/A hyperlink displays message, “**Status is N/A, manually run test claim for results**.” | |
| **If Override Status is…** | **Then…** |
| **Successful**  AND  Test Claim Status is **ACCEPT** | Status shows the override was entered, and claim will pay.   * Proceed to the next Step.   **Note:** Compass automatically defaults Refill Limit to 5 for Med D EGWP Plans. |
| **Successful** AND Test Claim Status is **DENIED**  OR  **Denied** | * Edit fields as appropriate for client and override type.   + Refer to [Compass – Editing an Override (043195)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e4c7a718-639f-4797-87c4-2e8c7a7f01db).   + Refer to the client CIF for client specific override rules. * After edits are made, click **Apply**, and then proceed to the next step. |
| **6** | Click **Finish** (located in the bottom right).  **Result:** The Override History screen displays, and override(s) is viewable in the list.  **Tip:** Filter by **Last Update** to view recent overrides.  A screenshot of a computer  AI-generated content may be incorrect.  **Reminder:** For Applying 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). | |
| **7** | Assist the member with filling the prescription at Mail Order. Refer to [Submitting an Early Refill Request through Mail Order](#_Submitting_an_Early).  **Tip:** Make note of the override ID it will be needed in step 4 of the Submitting an Early Refill Request through Mail Order section. | |

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| Submitting an Early Refill Request through Mail Order |

**Note:** If an override has been entered for Rx(s) that is in Future Fill In-Process at Mail Order, after the override has been entered refer to [Compass - Manage Diverts / Conflicts (Release Order) (056291)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d4ef5860-ef38-4ae9-afd8-a4cb0d1f12e6) to release the order.

Once the Override has been successfully entered, perform the following steps to submit the Early Refill request:

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| **Step** | **Action** |
| **1** | From the Claims Landing page **Mail Rx** tab, ensure any of the Rxs being submitted for an **Early Refill** request have had an early refill override successfully entered.  The appropriate override **must** have been entered first for each medication being ordered. If override is not already on file, refer to [Entering an Override at Mail Order](#OverrideatMO). |
| **2** | Click the checkbox(es) of the Rxs being submitted for an **Early Refill** request, then click **Add to Selected Rx(s)**.  **Notes:**   * Multiple members’ Rx(s) can be submitted for Early Refill at a time. * If the **Next Fill Date** field shows “**Due**,” the medication should not require an **Early Refill** request. |
| **3** | Click **Early Refill** to start the request.  A screenshot of a computer  AI-generated content may be incorrect.  **Result:** The Early Refill Support Task page populates. |
| **4** | Review and Confirm the Mail Order information, including:   * Name of person the medication is for * Drug Name/Strength * Refills remaining after today * Quantity * Days’ Supply * Shipping options/address * Phone number * Payment Method * Copay Disclaimer:  Please keep in mind that the amount due for your order may vary from this quote upon processing.   Agent will be **required** to manually enter Override ID and Reason for Early Refill before proceeding.  Departure Date and Return Date are **required** if member is traveling.    **MED D Only Notes:**   * The **Reason Code** column is dynamic, and will appear as **Messages** for Med D Members, functionality will remain the same. * If the medication is applying towards a **Transition Fill**, additional messaging can be viewed by clicking the **View** hyperlink under the **Messages** column. * Within the **Messaging** screen, Additional Messages will be dynamic. * Once reviewed, agent can click **Close** to return to the Early Refill Support Task screen.   **MED D Only Example:** Paid under Transition Fill. PA Required     * If any medication in the order in the Early Refill Support Task requires a Cold Pack, it will be indicated on the screen as shown below:   A screenshot of a medical form  AI-generated content may be incorrect. |
| **5** | When the order has been confirmed and verified, click **Submit Support Task**.  If Not Available/Not in Stock at Mail pop-up displays, refer to [Scenario Guide](#_Scenario_Guide).  **Result:** Message displays: “Early Refill Support Task was created.”  **Note:** If you need to make a change or cancel the order, click **Cancel**.  **Turnaround time****:** 3 business days. |

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| Scenario Guide |

Refer to the following scenarios as needed:

* [Selecting Drugs from Historical Test Claims](#_Toc201247121)
* [Duplicate Drugs pop up](#_Toc201247122)
* [Adding a Drug](#_Toc201247123)
* [If Rx(s) is Not in Stock at Mail](#_Toc201247124)
* [Rx(s) in the request is Not Available at Mail](#_Toc201247125)

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| **Scenario** | **Action** | |
| Selecting Drugs from Historical Test Claims | When selecting Rx(s) from **Historical Test Claims** section, keep in mind the Pharmacy **could be** dispensing a different **NDC** and agent may need to contact the pharmacy to verify.  If desired Rx(s) is **not located** within the **Historical Test Claims** section, agent will need to run a **Test Claim**.   * Proceed to the **Historical Test Claims** section, located below the **Claims History** section. * Locate the desired additional Rx #(s) and place a check in the applicable checkbox(es). * Once Rx(s) is selected, click **Add to Override List** (button will be disabled until Rx(s) is selected).   **Result:**  Rx(s) is added to the **List of Overrides to Create** section at the bottom of the screen.  **Notes:**   * Compass will only return up to **14 days** of **Historical Test** **Claims**. * If no claims are returned, message displays, “No Historical Test Claim Data.”   A screenshot of a computer  AI-generated content may be incorrect.  Proceed to [Step 5](#Step5) in Entering an Override at Mail Order. | |
| Duplicate Drugs pop up | If agent selects more than one drug with the same name and same strength (Duplicate Drug), the agent will receive the following pop up:  A screenshot of a computer  AI-generated content may be incorrect.  If **Duplicate Drugs** pop up appears when **Create Override** is clicked, Click **Close**, review the **Select Applicable Claims (max 10 drugs)** table and deselect any duplicate checkboxes for the same drug and same strength that have been selected. | |
| Adding a Drug | Proceed to the **Add Drug** section, located below the **Historical Test Claims** section.  Click the **Search** icon ().  The **Override** **Effective Date** and **Override** **Expiration Date** fields in the **Create Override/PA** tab will default to 5 days for non-controlled Rx(s) and 3 days for controlled Rx(s): **Do not edit**, unless directed by the **CIF**.  A screenshot of a computer screen  AI-generated content may be incorrect.  **Result:**  Find a Drug screen displays.   * Enter the desired drug and strength (only one drug can be added at a time). * Once drug is selected, review the **Drug Description** field to ensure the correct medication was selected. * If drug is not correct, click **Clear** and search again. * Click **Add to Override List** (button will be disabled until Rx is selected).   **Result:**  Rx is added to the **List of Overrides to Create** section at the bottom of the screen.  Agent will be **required** to manually enter the **Qty** and **Days’** Supplywhen Rx(s) is added to the **List of Overrides to Create** section.  A screenshot of a computer  AI-generated content may be incorrect.  Proceed to [Step 5](#Step5) in Entering an Override at Mail Order. | |
| If Rx(s) is Not in Stock at Mail | **Not Available/Not in Stock** **at Mail** pop up will display.  The impacted medication(s) will display in the **Not Available/Not in Stock** **at Mail** pop-up.  A screenshot of a computer screen  AI-generated content may be incorrect.  Advise the caller of the **Member options** available to them:   1. Advise the caller that the order can be placed, and the pharmacy will reach out to the provider for alternatives. Members registered to receive digital communications will periodically be notified on the status of the outreach. There may be a delay in fulfilling the order. If the member would like to choose this option, check off the Rx(s) and click **Confirm Rxs in Early Refill** and the selected Not in Stock prescription will be included in the refill request.    * If the caller wants to proceed with the early refill, inform the caller if they try to fill the original medication at another in network pharmacy, the order submitted would need to be canceled or the Rx that is Not in Stock would need to be placed on hold before it can be filled.    * If the caller does not choose an Rx from the Not in Stock table and the **Confirm Rxs in Early Refill** is clicked, those unselected prescriptions will be removed. Compass will then proceed with the normal early refill process for any prescriptions that were initially selected and are in stock.   A screenshot of a computer  AI-generated content may be incorrect.  Click **Submit Support Task** to submit the Early Refill request   * Make sure all prescription information, demographic, and financial information is reviewed and confirmed before submitting the Early Refill Support Task.   Click **Return to Mail Availability** to return to the Not Available/Not in Stock pop up.  Click **Cancel** to return to **Early Refill Support Task** screen.  If member doesn’t want to continue with the Early Refill for the Not in Stock medication, review the following:   1. Offer to check CVS retail inventory to determine if the medication is available at a local pharmacy. If the Check CVS Retail Inventory hyperlink is selected, the pop up will close but Rx will not be removed from the Selected Rxs. The Rx will pre-populate in the CVS Retail Inventory screen, refer to [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) or more information.    * Do Not Initiate a Mail to Retail Transfer Support Task, refer to [Compass - Prescription (Rx) Transfer (053932)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1e31ea60-77a3-4bb9-a619-7340ebf57484) for direction on Mail to Retail Transfer request. 2. Advise the caller they can contact their provider for alternative medications. If the caller asks about alternatives refer to [Compass- Viewing and Running Test Claims for Alternative Rx(s) (056849)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b3dbfb44-1c9e-47a6-b8f4-6010f553731b).    * Advise the caller any alternatives found would need to be discussed with their provider and a new prescription would need to be sent to our mail order pharmacy.      + If no alternatives are found and the caller wants to continue with the medication that is Not in Stock, advise the caller they would need to fill the prescription at another in network pharmacy. If the caller wants to transfer the Rx to an in-network Pharmacy refer to [Compass - Prescription (Rx) Transfer (053932)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1e31ea60-77a3-4bb9-a619-7340ebf57484). (Do Not Initiate a Mail to Retail Transfer Support Task)    * If alternatives are found, run test claims to determine coverage and pricing for the alternatives to discuss with their provider.   If there are no Rxs in the refill request, the system will display the error message. | |
| Rx(s) in the request is Not Available at Mail | **Not Available/Not in Stock at Mail** pop up will display.  A screenshot of a computer  AI-generated content may be incorrect.  If the medication is Not Available at Mail you can provide the below **Member Options**:   1. Offer to check CVS retail inventory to determine if the medication is available for the caller to get at a local pharmacy. If the Check CVS Retail Inventory hyperlink is selected, the pop up will close but Rx will not be removed from the Selected Rxs. The Rx will pre-populate in the CVS Retail Inventory screen, refer to [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) for more information.    1. Do Not initiate a Mail to Retail Transfer Support Task, refer to [Compass - Prescription (Rx) Transfer (053932)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1e31ea60-77a3-4bb9-a619-7340ebf57484) for direction on Mail to Retail Transfer request. 2. Advise the caller they can contact their provider for alternative medications. If the caller asks about alterntives refer to [Compass - Viewing and Running Test Claims for Alternative Rx(s) (056849)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b3dbfb44-1c9e-47a6-b8f4-6010f553731b).  * Advise the caller any alternatives found would need to be discussed with their provider and a new prescription would need to be sent to our mail order pharmacy. * If no alternatives are found and the caller wants to continue with the medication that is Not Available, advise the caller they would need to fill the prescription at another in network pharmacy. If the caller wants to transfer the Rx to an in-network Pharmacy, refer to [Compass - Prescription (Rx) Transfer (053932)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1e31ea60-77a3-4bb9-a619-7340ebf57484). Do Not initiate a Mail to Retail Transfer Support Task. * If alternatives are found, run test claims to determine coverage and pricing for the alternatives to discuss with their provider.   A screenshot of a mail  AI-generated content may be incorrect. | |
| **If…** | **Then…** |
| All Rxs in the **Early Refill Request** are **Not Available** **at Mail** | The **Not Available** **at Mail** pop-up will display the following options:   * Clicking **Close** will return the user to the **Early Refill** **Support Task** screen. * Clicking **Cancel Early Refill** will cancel the **Early Refill Support Task** entirely. |
| If some Rxs are **Not in Stock** and **Not Available** | The **Not Available/ Not in Stock** **at Mail** pop up will display.  The user will only be able to continue with **Not in Stock** Rx(s) follow the [If Rx(s) are **Not in Stock** **at Mail**](#IfRxsisNotinStockatMail) scenario above.    Any Rx(s) **Not Available** will be removed from the request upon continuing. |

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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)

[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)

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