# Compass – Plan Benefit Override (PBO) at Retail

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**Description:** Steps to take if a member needs an override at a Retail pharmacy.

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| Overview |



* Ensure the plan is active; overrides 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.”
* A rejected claim **must** be on file before an override is entered for a retail claim. The rejection does NOT need to reject for today’s date in order to apply the override (same day rejection).
* Run a Test Claim to ensure the override is appropriate.
* Check for existing PBOs or PBO Support Task.
* Refer to the CIF for client direction on what overrides are allowed.

**Note:** For Mail Order medications, 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).

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

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| Process |

Perform the steps below to enter the override:

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| **Step** | **Action** | | |
| **1** | From the **Claims Landing Page**, navigate to the **Claims** table, then click and review the **Reject Code** hyperlink of the rejected claim to determine why the claim is being rejected. | | |
| **2** | Perform a Test Claim to see if the claim still rejects. This can be started from rejected claim drop-down. Refer to [Compass - Test Claims (050041)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=60c20ea0-1d07-46e3-809a-b54734b80fbe).  To retrieve accurate test claim results, Test Claims can only be **processed** for the member profile **shown** in the Member Details panel. | | |
| **3** | When it is determined an override is needed, always check CIF for which overrides are allowed, if they have SCC codes, and for any specific notes or directions.  **Note:** If the rejection is not an appropriate override rejection, such as reject 70 - plan exclusion, do not proceed to enter an override, instead refer to process for that rejection reason. Refer to [Compass - Rejection Codes and Resolutions (Reject 01 – Reject ZN) (067649)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=104c3318-95ba-42e2-bd05-17877b0a8045).   If the CIF directs CCR to Submit a PBO 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) as needed.  **Reminder:** Before submitting a PBO Support Task, ask if the member can wait up to 7 (seven) business days, and provide turnaround time. Member will be contacted when the request is completed. | | |
| **4** | Determine if an SCC Code is appropriate. | | |
| **If…** | | **Then…** |
| An SCC Code is appropriate and allowed by the plan  SCC Overrides are only available for the following overrides (All options may not be available on all plans. Refer to the CIF.):   * Vacation * Lost/Stolen/Damaged * Dosage Change * Disaster/Emergency (due to a government issued state of emergency) **Note:** Disaster/Emergency SCC Codes do not display in the SCC Code link. These are plan specific, refer to the CIF. | | Refer to [Compass - SCC Override at Retail (061705)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bc09207c-b3ff-4c9e-803b-9a00f7038340). |
| If no SCC Code is available | | Proceed to next step. |
| **5** | 1. Click the **Override/PA History** hyperlink in the **Quick Actions** panel.     **Result:** The **Override/PA History** screen displays.     1. Review the **PA Status** section to determine if a Prior Authorization (PA) exists or **Override History** to determine if an Override already exists. | | |
| **If…** | | **Then…** |
| PA exists | | Refer to [Compass – Entering an Override when Prior Authorization is on File (050033)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5181ac2a-5db5-4f45-9e7d-bb603ba05244). |
| Override exists but claim still rejects | | Contact [Compass – Lifeline Quick Assist (072646)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cfa341fa-0ce1-4886-9650-f3cb112508e7) for assistance editing override if appropriate. |
| No PA or Override exists | | Continue to next step. |
| **6** | From the **Override/PA History** screen, click the **Create Override** Button.    **Result:** The **Create Override** tab displays. | | |
| **7** | Select the correct option from the **Override Reason** drop-down menu. You can search for override type by typing in the search bar at the top of reason codes.    The **Previous Override/PA** pop up will display if an override has been entered within the last 365 days with the same reason code. | | |
| **8** | Edit fields in the **Select Override Type for…** section. Refer to [Compass - Override Reference Table (061701)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=922592a2-b585-40da-9acb-f128fed94c62)  for reason codes and fields for each override.  A screenshot of a computer  AI-generated content may be incorrect.  **Notes:**   1. The GPI / NDC field automatically populates based on the client requirements (unless CIF shows otherwise). This field is editable if required. 2. **Ignore PA Status:** Leave as P-Plan Ignore PA Status (default), or as instructed by the CIF. 3. **Agent:** 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. 4. **Relationship To Member:** Auto populates with information from Authentication screen. If not, select the correct option from the dropdown menu. 5. **Requestor:** Auto populates with information from Authentication screen. If not, enter the requestor’s name. 6. **Authorized By:** Edit only if the CIF shows documentation is required or provides other instructions. 7. **Override Specialty Reject:** Defaults to No. Edit only if rejected for Specialty medication, or as instructed by the CIF. 8. **Authorized Notes:** 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 any required notes. 9. The **Effective Date and Expiration Date** of the override defaults to 5 days for non-controlled Rx(s) and 3 days for controlled Rx(s). **DO NOT** edit unless directed by the CIF. **(Day override is entered as day 1.)**   Agents are allowed to create up to **10 overrides** at a time between the **Claims History**, **Historical Test Claims** and **Add Drug** sections. | | |
| **9** | 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 Rx(s) is selected).  **Notes:**   * Agents can also utilize the **Historical Test Claims** and **Add Drug** sections below to locate additional Rx(s) in question. Refer to, [Scenario Guide](#_Scenario_Guide). * The **Override** **Effective Date** and **Override Expiration Date** of the override is filled out. **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.”     **Result:** Rx(s) is added to the **List of Overrides to Create** section at the bottom of the screen. | | |
| **10** | From the List of Overrides to Create, click **Create Override**(located in the bottom right).    **Result:** The **Override Results** pop up displays.  **Note:** If pop up displays when selecting drugs, refer to [Scenario Guide](#_Scenario_Guide). | | |
| **11** | Review the **Override Status** and **Test Claim Status**.  **Notes:**   * A test claim is automatically processed. * 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 PA Layering prevents edits to an override, the following message will display: “Client has Override/PA Layering, edits may not apply based on this Reason Code;” review the CIF and announcements in theSource prior to warm transferring the call to the Senior Team for assistance. | | |
| **If Override Status is…** | **Then…** | |
| Successful  **and**  Test Claim Status isACCEPT | 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. | |
| Successfuland Test Claim Status isDENIED  **or**  Denied | Status shows override was entered, but claim will not pay, **OR** Status shows override was denied.   * Refer to the client **CIF** for client specific override rules. * Refer to [Compass – Editing an Override (043195)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e4c7a718-639f-4797-87c4-2e8c7a7f01db) as appropriate.   + After edits are made, click Apply.   **Note:** If editing is still unsuccessful, contact [Compass - Lifeline Quick Assist (072646)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cfa341fa-0ce1-4886-9650-f3cb112508e7) for assistance. | |
| **12** | Click **Finish** (located in the bottom right).  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).  **Result:** The Override History screen displays, and override(s) are viewable in the list.  **Tip:** Filter by **Last Update** to instantly view recent overrides. | | |
| **13** | Advise the caller to have the pharmacy resubmit the claim. | | |

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| Scenario Guide |

Refer to the following scenarios as needed.

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| **Scenario** | **Action** |
| Selecting Drugs from Historical Test Claims | * Proceed to the **Historical Test Claims** section. * Locate the desired 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).   Unless specified in the CIF or a work instruction, a rejected claim at the retail pharmacy is required to enter an override.  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**.    **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**, worth of **Historical Test** **Claims**. * If no claims are returned, message displays, “No Historical Test Claim Data.” |
| Duplicate Drug 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:    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.  Proceed to [Step 5](#Step5) in the Process. |
| Adding a Drug | Proceed to the **Add Drug** section, located below the **Historical Test Claims** section.  Click the **Search** icon ().  Unless specified in the CIF or a work instruction, a rejected claim at the retail pharmacy is required to enter an override.   * 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**.     **Result:** Find a Drug screen displays.  **Notes:**   * 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(s) is selected).   **Result:** Rx(s) 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.    Proceed to [Step 10](#Step10) in the Process. |

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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/" \l "!/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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