# Compass - Mail Order Calls Regarding Deceased Members

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**Description:** Provides the processes to use when a member is deceased and a call is made to Mail Order to inform us.

**Note:**  For Medicare D, refer to [Compass MED D - Deceased Beneficiary (065228)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=03532634-0441-4503-8b66-d19f9eec0c32).

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| Express Empathy for Calls Regarding Deceased Members |

 When handling a call regarding a deceased member, it’s important to express empathy. Callers must still be authenticated. Refer to [Compass - Guided Caller Authentication (050163).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=80476f74-7dca-4548-bf35-185ca8d45c13)

**Examples:**

**** I’m sorry you are going through this. On behalf of CVS Caremark, please accept our sincere condolences for your loss.

I am deeply sorry for your loss; I can understand this must be overwhelming and I’m here to help with <reason member is calling>.



**** I’m so sorry to hear that. I realize this must be a very difficult time, what can I do to help?

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| Member Deceased but Showing Eligible in Compass |

Perform the steps below:

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| **Step** | **Action** |
| **1** | Remind the caller that their Client’s Benefits office should be notified. |
| **2** | Add a Mail Order Alert to stop orders from shipping automatically.   * **Category:** Do Not Mail Prescription   **Sub Category:** Member is deceased    Refer to [Compass - Viewing, Adding, and Editing Alerts (054194)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=36c941d2-25a6-4075-993d-f12deb31be18) as needed. |
| **3** | Place all future orders on hold until the line of eligibility can be closed. This includes any prescriptions enrolled in the auto renew and refill program.  Refer to [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) and [Compass - Auto Refill Program (ARP) (056033)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f843bc3f-55cc-4223-b2fc-03aff60cdf4c). |
| **4** | Remove the member’s email address and turn off Messaging Platform alerts.   * Refer to [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) and [Compass - Add / Edit / Delete Email Address (053409)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e01087c4-421c-4330-bcb3-81cb8cb45762).   **Result:** Cresta will note the account and include the deceased member’s name. |

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| Return of Medication |

If the caller is requesting to return medication because the member is deceased, refer to [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) for instructions.

For Medicare D, refer to [Compass MED D - Return Order for Refund - Copay Credit - CCR & Senior Process (061909)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=dc105707-608c-4fe5-a6f0-bfc9b4fc20ad) for instructions.

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| Statement of Cost (SOC) Request for Deceased Member |

 Statement of Cost (SOC) information can neither be requested nor released except to the Executor of the Estate. If the caller is requesting to obtain a SOC for a Deceased member, refer to [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).

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| Mail Service Account Balances, Credits, and Reissue Checks for Deceased Payee |

When a deceased member owes money or has a credit on their account for mail service orders, Finance will handle the account in the following ways:

**Balance Due:**

1. Our Pharmacy Benefits Management (PBM) attempts to collect the balance due. Balances owed on the account are billed for the first two months. If a death certificate is then received and indicates that there is not any estate or funds are not available, the balance is written off.
2. If our PBM is notified that there is an Executor, the Finance Department will wait however long it takes to receive a response from the Executor and/or payment on the account.

There are times, though not often, that there will not be enough funds to pay all debts and the balance can be written off, but not until our PBM receives notification.

**Note:** Power of Attorney is only valid when the member is alive; the Executor takes over after the member is deceased. For deceased members, a third-party may add a new method of payment to make a one-time payment only. A Power of Attorney (POA) will expire and no longer be valid once the beneficiary is deceased. To handle issues, CVS Caremark must receive one of the following (copies are acceptable):

• Letters of Testamentary

• Executor of Estate

• Death Certificate and affidavit stating no one else is in line for their estate

Address (Except for BlueMedicareRx (NEJE):

<PBM Name>

Customer Care

PO Box 6590

Lee’s Summit, MO 64064-6590

Blue Medicare Rx (NEJE) Mailing Address:

Blue MedicareRx

PO Box 30001

Pittsburgh, PA 15222-0330

Blue MedicareRx Fax Number: 1-866-342-7048

**Credit Due for Deceased Member:**

1. When a deceased member has a credit balance on the account, a refund is issued to the “Estate of <cardholder’s name>”.
2. Depending on their relationship to the original payee, the following documentation is required:
   1. **Surviving Spouse:** A copy of the death certificate indicating that they are the spouse and their Photo ID.
   2. **Executor of the Payee’s Will:** A copy of the payee’s death certificate, an executed copy of the will, letter of testamentary, or another legal document and the Photo ID of the executor.
   3. **Closed Estate with a Will:** A copy of the death certificate, an executed copy of the will, showing the claimant as the heir to the funds and Photo ID of the claimant.
   4. **Closed Estate Without a Will:** A copy of the death certificate and a letter from ALL direct heirs (i.e., if there are 3 children, then all 3 children must agree to the payment). Direct heirs should be listed in order of priority: Children, parents, and then siblings. Photo IDs will be required from all heirs.

**Note the following:**

* We are not able to reissue the check to other relatives unless there is a will or other legal document proving ownership.
* A Power of Attorney or a document naming beneficiary of life insurance does not constitute proof of ownership.
* If claiming funds on behalf of an institution, pharmacy, nursing facility, etc. for a deceased payee, provide documentation of the open balance on account or documentation showing that the facility is the rightful claimant of the funds.
* Without proper documentation, we are not able to reissue the check to a party other than the original payee.

 When we reissue this check, if by chance you have any additional outstanding checks, please be aware we will reissue those at the same time.

 **Note:** Prior to asking the member to send documents, ensure you have opened a [Compass - Refund Stop Payment Check Reissue (061420)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f6f8404c-3eff-42f0-82d5-ffe3b5fa1b5f) for Mail Order to research and have the payee estate reference the Support Task # in their correspondence.

Documents may be sent via email, fax, or mail. Email is preferred and will provide the fastest turnaround time.

**E-mail:** [MemberDisputesPBM@CVSHealth.com](mailto:MemberDisputesPBM@CVSHealth.com)

**Fax:** **1-480-860-3508**

**Mail:**  (Only mail copies of the originals, no originals)

CVS Health

Attn: Payment disputes task XXXXXXX

3100 Sanders Rd

Northbrook, IL 60062

**Turnaround Time:** The reissue of a check can take up to 30 days. It may take up to 8 weeks to receive.

For Medicare D, refer to [Compass MED D - Deceased Beneficiary (065228)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=03532634-0441-4503-8b66-d19f9eec0c32).

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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)

**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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