**Compass Software Release – Shared – August 21, 2025**

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[RTB Observation - ITPR073245 - Eligibility not showing correctly](#_Toc206574104)

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**Description:** Outlines the new features for the **August 2025 Software Release** for all lines of business **effective 08/21/2025**. Please give us your feedback about this Announcement by completing [this brief survey](https://forms.office.com/Pages/ResponsePage.aspx?id=uGG7-v46dU65NKR_eCuM1wxlZbzQAA5CrF9MJTTfTF9URVMxVllLNEdWOVZXVUVISzgzOTRHTDZFVi4u)!

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| Log Out Before a Software Release |

# Each time a software release is completed you must clear your cache. Please ensure that you Log Out of the Compass system the day before the Software Release.

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| **Step** | **Action** |
| **1** | Click on your profile picture next to the Bell icon on the top right of the Compass application and select **Log Out**.   * Do Not click the X to close the browser as this will not log you out of the Compass system. * If you forget to log out, refer to [Clearing Your Cache (008655)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cd7acfcb-ad36-4da3-b973-faf08afb7dea).   A screenshot of a computer  AI-generated content may be incorrect. |

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| Mail Pharmacy name update to comply with PBM Network Mandates |

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| **User Story #​** | US672668 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Request Tic Letter |
| **Why/What is driving the change** | Compliance- state regulations |
| **Current State​** | Tic letter displays CVS/Caremark for mail service pharmacy |
| **Future State​** | For members that are in PBM restricted network mandated states CVS/Caremark will no longer display as the mail service pharmacy. Mail service pharmacy pricing information (Drug cost, Plan Cost, Member Cost) for the target drug will continue to show on the letter. Only difference is that we will see that the Mail Pharmacy Name will now display as “Mail Service Pharmacy” |

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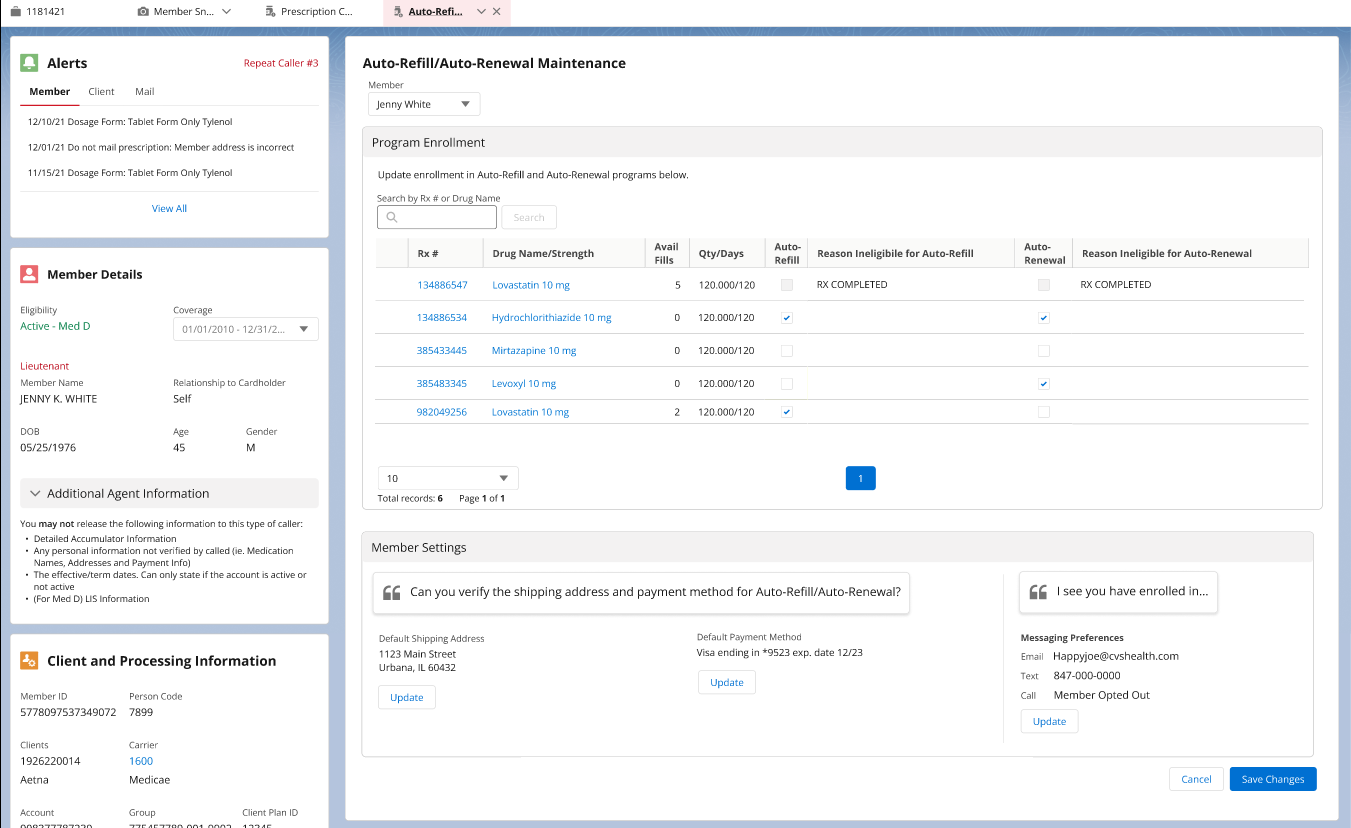
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| GPS to Compass cross console access- enhancements |

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| **User Story #​** | US593155, US635845, S706171, US717349 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Case workflow when accessing a member account from GPS, Service requests created when viewing additional members on an account |
| **Why/What is driving the change** | Streamline workflow for ISM users |
| **Current State​** | * ISM users handle calls primarily in GPS and then log into people safe for pharmacy related questions * When view additional members is used to access related account, the transactions get recorded in the member account that the case is tied to. There is no way to delineate between the actions taken on one account over the other |
| **Future State​** | Based on access, GPS users will have the ability to access a member’s compass account from within GPS and bypass authentication when there is an exact match found.  If multiple matches are found, user will have the ability to edit first/last name. When no match is found, user will be able to edit first/last name but will be required to re-authenticate the member in compass.  Closing the case in GPS will automatically close the case in Compass.  Key transactional service requests will have the membership ID recorded as a field to help user differentiate which account the action was taken on in instances where additional member account was opened from a case tied to a different family member. |

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| Updates to ARR for refill and new Rx for messaging preferences |

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| **User Story #​** | US490034 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Enrollment into ARR/ARP during order placement (refill and New Rx) |
| **Why/What is driving the change** | Business team observation |
| **Current State​** | When on the ARR/ARP enrollment screen during order placement, if the member requests any updates to the messaging preferences, user must manually go into Member snapshot, navigate to the Messaging preference screen to make the updates. There is no option to edit the messaging preferences currently from the ARP enrollment screens |
| **Future State​** | User will have the option to edit Messaging Preferences from the ARR/ARP enrollment screen. The option to edit will only be available for the member in focus like Shipping Address and Payment Method |



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| Brand name not showing on authentication screen for generic drugs |

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| **User Story #​** | US522789 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Authentication token screen |
| **Why/What is driving the change** | Reporting on reasons agents are bypassing authentication |
| **Current State​** | When a generic drug is dispensed, Compass does not display the brand name for it on the authentication token screen. |
| **Future State​** | When a generic drug is dispensed, authentication token screen will show the associated brand name to help the agent easily authenticate if the member was to provide brand name |

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| Update messaging for inactive members |

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| **User Story #​** | US587381 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Banner on landing page |
| **Why/What is driving the change** | Feedback from documentation |
| **Current State​** | When member is inactive the messaging on the banner indicates “No mail benefits”. It is confusing the users if that means retail benefits are available on the account and only mail eligibility is unavailable |
| **Future State​** | When member is inactive, the messaging on the banner will be updated to say “No benefits available” . This will apply to externally adjudicated members as well |

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| Default date for test claim |

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| **User Story #​** | US626341 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Test claim |
| **Why/What is driving the change** |  |
| **Current State​** | System defaults the test claim run date to today always |
| **Future State​** | For member that have a future eligibility date, system will default the test claim fill date to the first day the plan is active.  System will show a message next to the fill date when a future dated eligibility is used. System will remove the messaging if the agent manually updates the fill date  The future fill date will also be applied when running the test claim for alternatives |

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| Update to test claim reject Modal for refill and New Rx |

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| **User Story #​** | US637232 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Refill and new rx verification & confirmation screen |
| **Why/What is driving the change** | Consistency across test claims run during different workflows |
| **Current State​** | Next Best action is not available in the reject modal shown during the new rx and refill workflows |
| **Future State​** | When clicking the rejection code on Refill and new rx Verification and confirmation screens, the modal will include reason why rejected.  Reject code will be a hyperlink that scroll down in the modal to show Pharmacy Next Best Actions similar to the functionality on standalone test claim screen |

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| Disable OM support task creation from a research case |

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| **User Story #​** | US651715 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Support task creation |
| **Why/What is driving the change** | Non-Care users are getting view only (Research case access) and we want to ensure they are not able to transact within the account |
| **Current State​** | Order management tasks (Since they are built into the workflows) are not disabled in a research case. |
| **Future State​** | Following Order management tasks (Automated Support Tasks) will be available only in an interaction case:   1. Mail Rx Tab    1. Transfer Mail to Retail    2. Early Refill 2. Order Details    1. Rx Actions       1. Return       2. Extra Bottle       3. Reverse & Reprocess       4. Rx Copy    2. Order Actions       1. Invoice Copy    3. For Each Rx (Support Task)       1. Bulk Up 3. Transaction History    1. Payment Dispute Button    2. Payment Dispute Row Level Action   If users have the PBM research with Edit permissions, they will continue to have edit rights and these changes will not impact them. |

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| Update to Edit order service request for waived shipping |

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| **User Story #​** | US703051 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Service request for waived shipping |
| **Why/What is driving the change** | Duplicates observed on the waived shipping reporting |
| **Current State​** | During order update, if a user waives shipping along with payment and/or address updates, system records the Upgraded shipping at no cost field multiple times in each Service request |
| **Future State​** | When an order is edited, “upgraded shipping at no cost” will be populated only on Edit order service request.  Edit order- payment and Edit order- shipment Address updates will not record this field to avoid duplicates |

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| System should not prompt user to speak to member in case of minors |

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| **User Story #​** | US707815 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Discontinue Rx |
| **Why/What is driving the change** | User feedback |
| **Current State​** | When attempting to discontinue a prescription for a member under 18 years of age, system is prompting the user to confirm they directly spoke to the member before discontinuing when the caller was authenticated as family member/third party |
| **Future State​** | When attempting to discontinue a prescription for a member, system will prompt the user to directly speak to the member only in following instances:   * When the Rx belong to a member 18 years or older * When Rx belongs to a member under 18 years and caller is not a family member or third party |

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| Full 11 digit NDC to be sent when calling retail inventory API |

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| **User Story #​** | US711730 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Retail inventory search |
| **Why/What is driving the change** | User feedback |
| **Current State​** | System is sending the full 11 digital NDC (when there are leading 00’s) only when retail inventory search is accessed from specific workflows. When full NDC is not sent users do not get back expected results |
| **Future State​** | Whenever Retail inventory search API is called, system will always append leading 00’s to the NDC to make it 11 digits so that user is getting back accurate results |

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| Component error when attempting to sort list of pharmacies by inventory |

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| **User Story #​** | US711872 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Retail inventory search |
| **Why/What is driving the change** | User feedback |
| **Current State​** | User is receiving a component error when attempting to sort the list of pharmacies on CVS retail inventory screen by the Quantity available column |
| **Future State​** | Users will be able to successfully filter CVS retail results by the Quantity available column |

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| Missing Rx reship support task field correction |

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| **User Story #​** | US713543 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Reship support task |
| **Why/What is driving the change** | Feedback from the downstream team working the reship tasks |
| **Current State​** | When placing a reship support task, user is entering Qty shorted in Compass. However when the support task is created the field label is “Qty received” and causing the backend to reship incorrect qty |
| **Future State​** | Reship support task for Rx Quantity shorted will have a field for “Qty shorted” instead of “Qty received” |

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| Utilize new not available at Mail indicator for Praas |

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| **User Story #​** | US717637 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Test claims |
| **Why/What is driving the change** | Praas adoption |
| **Current State​** | When pricing is not returned on accepted claims, not available column is a hyperlink that the user must click on to interpret why it is not available |
| **Future State​** | Pricing will not be returned on accepted test claims if the drug being requested is not available at mail (GLP1, Starter step up). When pricing is not returned user will see the following message “The Mail Member Pay will not be returned for Rx's that are not available at mail order."  Not available field on test claim results will no longer be a hyperlink. |

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| Member resources not loading the address in picklist |

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| **User Story #​** | US656785 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Member resources |
| **Why/What is driving the change** | User feedback |
| **Current State​** | When attempting to request Member resources, no addresses are displayed if the member does not have any mail order addresses on file. |
| **Future State​** | If member does not have Mail order address on file, system will display messaging to prompt them to add a mail order address before ordering the resources |

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| Component error on Find a drug with Transfer Rx option |

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| **User Story #​** | US667030 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Find a drug on test clam or new Rx |
| **Why/What is driving the change** | User feedback |
| **Current State​** | User getting a component error on find a drug when they have the transfer retail to mail screen open while using find a drugà user is unable to complete the request |
| **Future State​** | User will not get a component error on find a drug and will be able to complete the test claim or new rx request as expected |

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| Returns support task not loading drug information |

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| **User Story #​** | US717105 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Returns support task |
| **Why/What is driving the change** | Feedback from Backend team working the task |
| **Current State​** | Returns support task in some cases is not loading the drug information, causing backend team to return the tasks without processing the member’s request |
| **Future State​** | Rx and drug information will be populated in the returns support task as expected |

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| Component error with Inbound transfers |

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| **User Story #​** | US719154 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Inbound transfer |
| **Why/What is driving the change** | User feedback |
| **Current State​** | Compass is giving a component error when inbound transfer comes in from a frontline agent in certain instances. This is causing the member accounts to not load, and no membership ID is attached to the case |
| **Future State​** | Inbound transfer will work as expected |

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| NIS/Not available at Mail indicator on Alternative Drug results screen |

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| **User Story #​** | US682111 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | View alternatives on Test claims results |
| **Why/What is driving the change** | Adopting the new Not available at mail indicator for alternatives |
| **Current State​** | Mail availability indicator is not available when view alternatives |
| **Future State​** | Mail availability will be available when viewing drug alternatives to help agent discuss most suitable options with the member |

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| Auto refill/Auto Renewal Disenrollment Cancellation add messaging |

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| **User Story #​** | US724843 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | ARR/ARP enrollment screen |
| **Why/What is driving the change** | Intake project request to improve member experience |
| **Current State​** | When a member disenrolls a Rx from ARP, agent is required to manually review and cancel any in process orders |
| **Future State​** | When a member disenrolls a Rx from ARP, LINKS will systematically cancel any in process orders for the Rx (Rx will be placed on indefinite hold)  If the in-process order is already in dispensing, LINKS will not cancel the order, and member will still receive it.  Additional verbiage will be added to the screen to agent can educate the member on what to expect for any in-process orders  If the agent wants to manually review status of in-process order, they will need to navigate to Mail order history screen.  If the in-process order is in a FFL hold, the status will get updated to indefinite hold only once the FFL divert is released. |

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| Not available at Mail for Non-GLP & non starter step up drugs- regression testing |

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| **User Story #​** | US711866 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | All screens that have the Mail availability indicator |
| **Why/What is driving the change** | Observation during testing |
| **Current State​** | Mail availability indicator is not comprehensive. Incorrectly displays certain drugs as in stock when they are not truly dispensed by mail |
| **Future State​** | In stock/Out of stock indicator will be more comprehensive to help agents correctly identify which drugs are not dispensed/not in stock at mail |

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| Update to NIS refill flow |

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| **User Story #​** | US715114 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Refill verification screen |
| **Why/What is driving the change** | Feedback from documentation |
| **Current State​** | When on Rx Refill - Verify page, when user updates the address and that changes the mail availability status, they have no way to get to the verification page and add the payment/address or other fields. The only option they have is to select the Rx’s to be included and submit the order |
| **Future State​** | When on Refill Verify and address is changed, popup for Not in Stock status change does not appear immediately. All information on the Verify screen must be confirmed and then click Next. If the Rx In Stock/Not in Stock status has changed, popup will display with various options to proceed, based on what the member decides. One example, if member no longer wants to include the now, Not in Stock Rx in the refill request, click Apply Updates, and Rx Refill - Verify screen displays with the Not in Stock Rx removed and updated Cost displays to review with the member. |

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| Pharmacy search for specific dates |

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| **User Story #​** | US626340 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Pharmacy search |
| **Why/What is driving the change** | User feedback that they are unable to provide pharmacy network information for future dated eligibility. Functionality that specifically gets used prior to welcome season/upcoming plan year changes. |
| **Current State​** | System uses today’s date when searching for in-network pharmacies |
| **Future State​** | System will have the ability to enter a date into the pharmacy search screen   * Date will default to today’s date for currently active plans * Date will default to eligibility dates for future dated accounts   The entered date will be used to determine and return network pharmacies |

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| Adopt PraS to view information and pricing for alternatives |

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| **User Story #​** | US553952, US672653 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | View alternatives on Test Claim and Coverage Determination |
| **Why/What is driving the change** | Adoption of the new PraS API |
| **Current State​** | Ability to view alternatives is available on test claim creation and results screen.  To price the available alternatives, user must manually add them to the requested drug table and re-run the test claim |
| **Future State​** | The ability to view alternatives will only be available on the test claim results page. Clicking on view alternatives will open a new subtab with the alternatives listed along with the pricing for each. Pricing is based on what was entered for the original test claim, retail and/or mail order.  System will display the Mail and retail pharmacy used to run the test claim for the alternatives. User will have the ability to select an alternative medication and click Edit Test Claim Criteria.  Users will have the option to view additional formulary alternatives. Formulary alternatives will not have pricing information available. User will need to select Rx and click Edit Test Claim Criteria to add medication to the test claim run table if they need pricing on any of the formulary alternatives.  Mail availability for each alternative will be provided  Coverage determination screen will also be updated to use PraaS API to get alternatives. No Screen changes  On the test claims results page "Not available" status will show as a link that when clicked a modal will display "The Mail Member Pay will not be returned for Rx's that are not available at mail order." |

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| RTB Observation - ITPR073245 New Rx Status no loading for member |

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| **User Story #​** | US739962 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | New rx status screen |
| **Why/What is driving the change** | User feedback on the new rx status screen not loading expected data |
| **Current State​** | New rx status screen in Compass is not loading data. Agents rely on the comments to view any new rx request information |
| **Future State​** | New rx status screen in Compass will work as expected with all required data fields. |

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| RTB Optimization - ITPR073247 - Accumulations Updates |

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| **User Story #​** | US449408 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Accumulations |
| **Why/What is driving the change** | Multiple feedbacks about confusion for Family only accumulations not displaying |
| **Current State​** | Tab loads to Individual level Accumulations and toast message isn’t descriptive. |
| **Future State​** | Tab loads to Family level Accumulations when only family accumulations are found. A new tool tip will be displayed for accumulation type OOP Including Deductible. And the toast message for non-pharmacy claims has been updated for clarity. |

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| RTB Optimization - ITPR073247 - Access Pharmacy/Provider Locks from Override History |

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| **User Story #​** | US588396 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Override/PA History |
| **Why/What is driving the change** | Received feedback that finding this information could be difficult |
| **Current State​** | Pharmacy/Provider lock displays on Override Details screen only |
| **Future State​** | Pharmacy/Provider lock will display dynamically on the Override/PA History screen as well |

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| RTB Enhancement - ITPR073247 - Member Search Account Restriction Update |

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| **User Story #​** | US683808 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Member Search |
| **Why/What is driving the change** | Business decision to update what is displayed during Member Search to lessen confusion for reps |
| **Current State​** | When rep doesn’t have access to a Member’s record, the record will not display in the search results |
| **Future State​** | All search results for the input search criteria (up to 50 total records) will display in the search results even if rep doesn’t have access to that record (example: CVS Health Employee accounts) with only the last 4 digits of the ID displaying. Current messaging based on restrictions will still function as implemented.  Note: CarelonRx Records will continue to be hidden for those without applicable access.  Note 2: Search by Retail Rx will not have this display update, but will continue to display the applicable messaging when the record is selected. |

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| RTB Enhancement - ITPR073247 - Note on All Support Tasks [No PCI Info on Notes] |

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| **User Story #​** | US692331 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Support Task |
| **Why/What is driving the change** | Business decision due to feedback |
| **Current State​** | Note regarding not adding Bank Account and/or Credit Card information is only on some tasks |
| **Future State​** | Note will be added to all tasks |

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| RTB Observation - ITPR073245 - Opportunity History Missing Information |

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| **User Story #​** | US696490 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Opportunity History |
| **Why/What is driving the change** | Received feedback |
| **Current State​** | Not all historical Opportunities were displaying |
| **Future State​** | All historical opportunities will display |

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| RTB Enhancement - ITPR073247 - COB tab enhanced |

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| **User Story #​** | US710273 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Coordination of Benefits |
| **Why/What is driving the change** | Received feedback |
| **Current State​** | Compass only retrieves 2 years worth of records |
| **Future State​** | 2 year limitation on COB records will be removed and all COB records for a member will display. Removing note indicating 2 year limitation. |

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| RTB Observation - ITPR073245 - Support Task - Access Member Account Pulling Wrong Account |

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| **User Story #​** | US710409 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Support Task |
| **Why/What is driving the change** | Received feedback |
| **Current State​** | When task workers are clicking the Access Member Account button, sometimes they enter a different member or the correct member but different Carrier, Account, Group, or plan year |
| **Future State​** | User will open a case for the same Carrier, Account, Group, Member ID, and Plan Year that the task was submitted for |

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| RTB Optimization - ITPR073247 - Update Note on RxClaim Benefits View |

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| **User Story #​** | US711620 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Benefits; RxClaim View |
| **Why/What is driving the change** | Feedback received that note wasn’t detailed and could be misunderstood |
| **Current State​** | Note calls out Copay, Days Supply, and Utilization Rate are displayed and everything else should be found in the CIF or test claims |
| **Future State​** | Note has been updated to call out the specifics of what other information can be obtained from the CIF and Test Claims. |

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| RTB Observation - ITPR073245 - Eligibility not showing correctly |

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| **User Story #​** | US712235 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | View Additional Coverage modal |
| **Why/What is driving the change** | Received feedback that the information displayed wasn’t accurate |
| **Current State​** | For 1 reported member, the View Additional Coverage modal isn’t displaying the correct status (Inactive or Active) for the lines of eligibility displayed. This could be affecting more members, but only 1 has had feedback submitted. |
| **Future State​** | View Additional Coverage modal will display the correct status based on effective period and status |

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| RTB Enhancement - ITPR073247 - Member Journey at Family Level PART 2 |

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| **User Story #​** | US713442 |
| **Line of Business** | All |
| **Impacted Feature/ Screen​** | Members Recent Cases component (Member Snapshot and Case tabs) |
| **Why/What is driving the change** | Gap identified when implementing Family view of Member Journey |
| **Current State​** | Only way to see Family view of Member Journey is to open Member Journey screen and change the drop down |
| **Future State​** | New hyperlink will be added to the Member’s Recent Cases component (on Member Snapshot and Case tab) that will navigate directly to the Family view of Member Journey. |

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