# Compass FAQs

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**Description:** This document introduces and provides FAQs about Compass, a new Customer Relationship Manager (CRM) tool created to replace PeopleSafe, including answers to the most frequently asked questions submitted via the Compass Feedback tool.

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| Compass Functionality FAQs |

The following table provides answers to the most frequently asked questions submitted via the Compass Feedback tool:

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| **Question** | **Answer** | **Category** |
| **Why am I not seeing Accumulations for all members on the account?** | Compass defaults the Accumulation view to the individual member who was authenticated on the account. To see all Accumulations for all family members on the account, change the view to **Family** from the upper lefthand corner of the screen. Refer to [Compass - Viewing Accumulations (050010)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c4fb8a09-f22f-49cd-a22d-71930039f08c). | Accumulations |
| **Why do I see Alerts in the Left-Hand pane but when I click View All I do not see it?** | The system only return up to a maximum of 20 "**combined"** Alerts for Mail Order and the member. You will need to adjust the date if you do not see the alert within All View. | Alerts |
| **Why does the Authentication look different?** | Make sure you are using the correct URL for Compass and using the Search tab labeled **Search (New UI)**.  Compass URL: <https://service360.my.salesforce.com/>.   * If the tab says **Search**, use the X in the Search tab to exit the tab after the Case is closed. * If the Search tab has no X, follow the instructions below:  1. Ensure work is completed and no call is in session. 2. Select the **9 dots** below the Compass logo and type in the word "Close". 3. Select **PBM Close Case** Tabs and then click **Close** tabs. | Authentication |
| **How do I log in to Compass?** | Refer to [Compass - Log In (Login) to Compass Using CVS Multi Factor Authentication (MFA) with SiteMinder (056719)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=647f7523-3f45-43f1-8564-3551d316cb8c). | Best Practice |
| **Where do I find Compass WIs?** | The Compass Work Instructions are now searchable on theSource.  Refer to [Compass - Customer Care Document Index (058484)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5adafaf7-02a1-49b8-b58b-3abceda07ad2) | Best Practice |
| **Where can I leave feedback about the Compass tool?  Will I be notified on the status of my feedback?** | Submit system process improvement, change, enhancement, etcetera, suggestions in Compass. Refer to [Compass - Submitting Feedback (047004)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=2f9c9c9a-47ce-4600-afae-1c16ef9b7808). | Best Practice |
| **What happens if I refresh my Compass screen?** | Compass can be refreshed the following ways:  On the Claims Landing Page via the Refresh icon.    **Or**  At the Tab level via the tab’s drop-down arrow. | Best Practice |
| **Why am I not seeing claims on the Claims Landing Page?** | Check your Search filters. Compass introduced several filtering options; it is likely that one of these may have been set. If you do not see the claim after changing your Search filters, click the **Refresh** icon.  **Note:** Compass automatically sets the initial claim filter to within the last 90 days for the entire family. Additionally, there are more filters next to the **Refresh** icon. Refer to [Compass - Claims Landing Page (049993).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c8f0ac8f-b076-4187-944d-2cf65b0ec799) | Claims |
| **Why am I unable to locate all the members’ claims?** | Ensure the appropriate timeframe is selected in the **Show Last** filter.   * If unable to find the required claim by filtering on a specific member, select **Family** in the dropdown to look for the claim. | Claims |
| **How can I find the name of a medication quickly when member is asking for the mail order status?** | The quickest way to find the medication is from the Claims Landing Page: use the **Search Rx or Drug Name** field on the **Mail Rx History** tab. | Claims |
| **When searching for a drug, some drugs are not displaying with the type-ahead functionality.** | The Compass type-ahead functionality pulls from a list of just a few 100 common or hard to spell drugs. Compass routinely updates this list. | Drug Name |
| **Why isn't ePA available in the row level dropdown menu of the rejected claim?** | ePA will only display for the individual member who was authenticated on the account. You must have the correct member profile selected in the **Member Details** panel; otherwise, the **Initiate ePA Request** button will not illuminate. Refer to [Compass Prior Authorization, Exceptions, Appeals Guide (063978) then locate Initiating an ePA Request (055814).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=657ddfe3-27d1-4a21-8f51-8cbd3961001c) | ePA |
| **Why do I have trouble pulling up an account? I am entering the member information on the Member Search screen, but no results are being returned.** | Ensure they are inputting the correct information.  **Example:**  First Name should be listed first, then the Last Name (instead of Last Name first). | Member Search |
| **Where do I find orders that have been recently placed within 15 minutes?** | From the Mail Order History tab, click the **In-process orders** button. | Order Status |
| **Not seeing some orders in Compass?** | The default filter on the Mail Order History tab is set to within the last 90 days. Make sure to change the filter in the **Show Last** field if looking for older orders.  **Note:**  When searching for a particular drug from the Mail Order History tab, try using the **Search by Order #, Rx # or Drug Name** field to view the order with applicable Order Date. | Order Status |
| **Where can I view PeopleSafe Call Activity and Resolution Manager Tasks?** | TheView PeopleSafe Activity hyperlink can be found in the Member’s Recent Cases panel on the Case Details Landing Page.  Refer to [Viewing Activity in PeopleSafe and Compass Interactions (046145)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=318e35f6-03d7-4aeb-92c1-8bf24ca8d851). | PeopleSafe Call History/RM Task History |
| **What do I do when a CVS ID Error is received while applying phone number update to family?** | Close the **Apply to Family** modal, then update each family member individually. | Phone Number |
| **Why is the repeat caller not matching PeopleSafe** | The Repeat Caller indicator in Compass only looks at Case History within Compass; additionally, it is at the individual level not at the family level.  In other words, it is counting how many times an individual member’s account was worked in Compass. | Repeat Caller |
| **Why can't I make any changes when viewing a member's other coverages?** | Viewing additional coverages is a "view" only if you need to take action within that account you must close out your existing Case and access the account you need to make changes to with a new Interaction Case | View Additional Coverage |
| **How to view family members / process for assisting another family member or viewing a family member’s call history within the Case Tab?** | Compass only displays information/allows action for the individual member who was authenticated on the account.   * If action is required for a different family member, you must close the current Interaction Case then reauthenticate and open a new Interaction Case for the family member. * If you need view-only access to a different family member’s account:   + From the Member Snapshot or Claims Landing Page, click the **View Related Members** hyperlink in the Member Details panel.   + Select the different family member you would like to view.   + A Research Case opens. | View Related Members |

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| General FAQs |

General FAQs are provided:

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| **Question** | **Answer** |
| **What is Compass?** | Compass is a new Customer Relationship Manager (CRM) that will replace PeopleSafe. |
| **What is a Customer Relationship Manager (CRM)?** | A CRM system helps companies, such as CVS Health, manage customer data in a way that improves business relationships with customers, specifically focusing on customer retention and ultimately driving sales growth. PeopleSafe is the current CRM tool used by Care and developed in-house to provide a central place for colleagues to access member data, answer questions, perform functions to assist members, and document member interactions. |
| **Why are we calling it Compass?** | A Compass is a device that is used to find direction, and we found many great parallels between what we expect from our new system and how a compass might help.  **Fact:** Early adopters and project team voted on the best name. |
| **Is Compass just a replacement for PeopleSafe?** | Compass will improve on PeopleSafe in many ways. We want the tool you use every day to be:   * Intuitive and easy to navigate * Agile with unconstrained thinking to continuously improve * Automated, when possible, to reduce manual processes * Streamlined to reduce process steps and time * A clear and comprehensive view of the member * An intelligent and guided call handling experience |
| **Why are we replacing PeopleSafe with Compass?** | This project is part of Care’s ELEVATE efforts to transform its customer care business and member experience. We are consumer obsessed, thinking big, acting, adapting, and improving along the way to create simplicity and deliver the best tool possible for our colleagues to help provide a 360-degree view of the member experience.  The vision for implementing a new CRM tool is to drive better outcomes for our colleagues, our customers, and our business. We want to transform the Care service experience, creating simplicity, increased efficiency, and an improved member satisfaction. |
| **What are the goals of Compass and what value will it bring?** | Compass will improve the member and end user experience in many ways including, but not limited to:   * Providing a single pane of glass that reduces the dependency of a user to access other applications. * Improving speed to proficiency with guided workflows when applicable. * Empowering the agent to solve member inquiries with reduced dependency on the Senior Team (**Example:** EGWP Overrides). |
| **Who will utilize Compass?** | Customer Care Representatives will be the primary users, and the new CRM tool will affect other business units, colleagues, and teams over the next few years as each Line of Business migrates to the new tool. |
| **Who is developing Compass?** | The project teams involve engineers, project managers, IT professionals, Customer Care Representatives, and a host of talent from across the PBM. |
| **Where did the ideas for improvements come from?** | We may have already asked you to share how you feel about our current CRM (PeopleSafe) during a focus group or trained you to participate in a pilot.  We review all feedback, positive and constructive, and discuss recommendations during CRM design sessions. Some of our design choices have been based on colleagues’ feedback.  Refer to Compass Information and Resource Hub [Agent’s Corner](https://aetnao365.sharepoint.com/sites/CompassInformationandResourceHUB/SitePages/Agent's-Corner.aspx) for more information on Joining Forces with agent feedback. |
| **How do I get my Compass questions answered?** | If you use Compass today, please refer to the appropriate Compass work instructions when taking calls. Questions specific to Compass documentation can be submitted using the Feedback button in theSource. If you have feedback on the Compass system, please use the Compass Feedback function within Compass. Refer to [Compass - Submitting Feedback (047004)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=2f9c9c9a-47ce-4600-afae-1c16ef9b7808). |
| **What will the new CRM tool do better than PeopleSafe?** | Some high-level capabilities that will transform the member and agent experience include:   * **Predictive Intelligence:** Alert agents to why members may be calling and guiding them through the call * **Omnichannel Options:** Agents can interact with members via the member’s channel of choice (phone, email, live chat, etc.) based on their assignment by leadership * **360 Member View:** Real-time access to complete, accurate member info/history so we can be proactive in helping the member manage their benefits * **Integrated Platform:** Single interface, reducing the need to access separate systems while making it easier to learn, navigate, and addressing customer needs * **Guided Workflows:** Lead agents through complex tasks with prompts to address the members’ needs and recommend subsequent best actions * **Streamlined Knowledge Management:** Intelligently recommend relevant, more streamlined articles at the right points in the call flow, without having to access a separate system to search/find the correct information |
| **How committed is CVS Health to ensuring Compass is a success?** | Compass is a multi-year, multimillion dollar project with complete support and backing by senior leaders to ensure we deliver a product that will improve the user’s experience and the interactions with our callers. |

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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)

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