# Compass - Transfer Existing Rx to Another Account (Carrier-to-Carrier/Open Rx Transfer)

[Transfer Existing Rx to Another Account (Same Member to Same Member)](#_Toc203980247)

[Scenario Guide](#_Toc203980248)

[Related Documents](#_Toc203980249)

**Description:** Process for transferring open refills from the member’s previous account to another account using Compass automation.

http://sharepoint/sites/opscom/Operations%20Communication/Formatting/Icon%20-%20Important%20Information.pngThe account that prescriptions are being transferred to must have active eligibility. Prescriptions that are excluded such as controlled substances may not be transferred.

**Examples:**

* Commercial account to Commercial account
* Commercial account to Med D account
* Med D account to Med D account

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| Transfer Existing Rx to Another Account (Same Member to Same Member) |

**Notes:**

* This process is used when a member needs to transfer remaining refills between Compass profiles, or from their former Client or RX Group to their new carrier. To be transferred, it must be a Mail Order Prescription (Rx) that has not expired and has refills available, regardless of whether the former Compass profile is Eligible/Not Eligible.
* This Rx transfer process **does not** apply to controlled substances (C2-C5). If eRx’s are voided, then the chain is broken, and they cannot be reactivated (for the Rx to remain DEA compliant for eRx’s). Refer to [Compass - Controlled Substance State Laws (058033)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=76fe19d9-b159-43a4-9db5-077ba1f6a958) for additional information.
* This process **cannot** be used for prescriptions that are currently in processing. The prescription must be placed on hold or canceled to transfer from one account to another. Please 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) or [Compass - Cancel or Remove a Prescription (Rx) from an Order (056363)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9c43c276-a6a4-4481-880d-62b194600f02) as needed.
* Hold Indefinite (member or our request) prescriptions will not transfer to new vendors when the client/plan has been terminated. This includes client changes and from one of our plans to another of our plans. Refer to [Compass - Delayed Prescriber Response/Prescriber Holds (057051)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=101f5c27-321e-427d-86e2-715d4e62b660) for additional information.
* Prescriptions from prior/expired CVS/Caremark managed plans will display under **Prior PBM Prescriptions**, refer to [Scenario Guide](#_Scenario_Guide).

**** If you are unable to transfer the prescription, assist the member with obtaining a New Rx for the member, refer to [Compass - Obtaining a New Prescription (Rx) for the Member (New Rx Request) (054208)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a7684ce9-c2bc-4cbc-ab37-c1ffb7789706).

To transfer remaining refills from one account to another, follow the steps below.

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| **Step** | **Action** | |
| **1** | Ask the member to provide the Rx number of the prescription that they want to transfer from their previous account.   * If the member provides the Rx number, skip to [Step 4](#TransferStep4). * If the member does **not** have the Rx number available, search and locate their previous account, then open the account as a **Research Case**. Proceed to the next step.   **Notes:**   * Viewing the member’s previous account as a Research Case allows you to access an Rx# and **copy and paste** it to assist with Transferring Rx(s) to the member’s new account. * To view inactive/termed accounts, in the **Search Result** section, select the Eligibility Filter **Inactive** or **Both** radio button. For assistance, refer to [Compass - Member Search (050037)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44e71d7a-1b1c-4931-9089-d4161a72d114).   A screenshot of a computer  AI-generated content may be incorrect. | |
| **2** | Once the previous account is located, access the Claims Landing Page, click the **Mail Rx** tab, and make note of the Rx numbers the member wants transferred to the new account.  A screenshot of a computer  AI-generated content may be incorrect. | |
| **3** | Access the member’s new account.  **Reminder:** When you no longer need the previous account, document the Research Case, then close that account. A research case and an interaction case can be open at the same time.  Open the new account as an **Interaction Case**. | |
| **4** | Using the active account; the member would like to transfer the medication to.  Click the **Mail Rx** tab from the Claims Landing Page, and ensure you are viewing the correct family member.  **Note:** If transferring Rx(s) for a dependent or child, switch profiles. (The system is intuitive and provides guidance.)  **Example:** When a father calls to transfer prescriptions for their minor child, access the father’s account, then select the minor child from the **View by Member or Family** dropdown. | |
| **5** | Click **Account Transfer**.  A screenshot of a computer screen  AI-generated content may be incorrect.  **Result:** The Transfer Rx(s) to Current Account section displays. | |
| **6** | Type a Rx number from the previous account and click **Find**.  A screenshot of a login screen  AI-generated content may be incorrect.  **Result:** Search results display.  **Notes:**   * In escalated situations, contact Clinical Care for a possible pharmacist to pharmacist transfer. * If the Rx(s) found do not match the member’s information, the following message displays: “The DOB or Gender do not match. If the Rx# you entered is correct, check the **CIF** for who to contact for eligibility.” * If no Rx(s) are found, the following message displays: “No Rx’s Found, please verify.” * You may receive the “No Rx’s Found, please verify” error if the order is currently in processing. Place Rx on hold or cancel Rx to transfer. Please 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) or [Compass - Cancel or Remove a Prescription (Rx) from an Order (056363)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9c43c276-a6a4-4481-880d-62b194600f02) as needed. | |
| **If the “Transfer To” and “Transfer From” Member Names…** | **Then…** |
| Match | Proceed to the next step.  **Note:** If Member has a Nickname, click **Yes**.  A screenshot of a member name  AI-generated content may be incorrect. |
| Do **NOT** match | **DO NOT CONTINUE.** The transfer cannot be completed automatically. Click **No**.  **Result:** The following message displays: “The Member’s Name does not match. If the information on the Rx is correct, please check the CIF for who to contact for Eligibility.”    Refer to the [Scenario Guide](#_Scenario_Guide) section below for additional information. Other possible errors include:   * Non match Rx Number (Cannot locate Rx # on any commercial account) * Date of Birth Does Not Match, Cannot Continue |
| **7** | Compare the “Transfer To” and “Transfer From” sections to validate it is the same member. Verify the following information:   * The member’s complete name including middle initial. * Gender * Date of Birth * The previous client’s name and the new client’s name.     A screenshot of a account  AI-generated content may be incorrect. | |
| **8** | The system displays all Open Refills which are available to transfer from the old account and checks for remaining refills. Review the prescriptions to be transferred before completing the transfer.  Once you transfer one prescription, the system automatically transfers all the member’s eligible prescriptions that have remaining refills that are not in processing from the previous account to the new account.  **Note:** Only prescriptions that can be transferred display. If the member needs medications that cannot transfer, support with a New Rx request.  **Example:** Controlled substances cannot be transferred, nor can prescriptions that are expired or have no remaining fills available.  A screenshot of a computer  AI-generated content may be incorrect.    If there are prescriptions that can be transferred, but no open refills display on the Refill Transfer screen without a pop-up message, there is a system error. Create a Support Task, **Task Type:** Refill Request-Offline Refills, to move all applicable prescriptions over to the new account. Refer to [Compass - Support Task Types and Uses List (058147)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6753488f-3996-45d9-88ba-257575369a98) for additional information. | |
| **9** | Click **Transfer** to transfer all prescriptions.  **Result:** Prescriptions are transferred to the new account. | |
| **10** | Click **Close**, then **Refresh** on the **Mail Rx** screen.  A screenshot of a computer  AI-generated content may be incorrect.  **Result:** Refills display on the **Mail Rx** screen.    **Reminders:**   * Transferred prescriptions are not displayed on Caremark.com until they have been filled on the new account. * Members must contact Customer Care to request the first fill of the new prescription. Once filled and shipped, the prescription will be available for the member to refill online going forward. | |
| **11** | Prescriptions transferred from a previous CVS/Caremark account to a New CVS/Caremark account displays under the Prior PBM Prescriptions list on the **Mail Rx** tab. Continue with the standard procedure to complete the refill request. Refer to [Compass - Mail Rx Refill/Renewal (Order Placement) (054262)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad3a7263-725b-4d5d-a2ec-440f1f30d79c).  **Note:** If the prescriptions do not display, close out of the member’s account and reopen it to the **Mail Rx** tab (from the Claims Landing Page). If the prescriptions still do not populate, proceed to the [Scenario Guide](#_Scenario_Guide).  A screenshot of a computer  AI-generated content may be incorrect. | |

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| Scenario Guide |

Refer to the following scenarios, as needed:

[Match Rx Number](#_Toc177035777)

[Member's Name does not match](#_Toc177035778)

[Date of Birth does not match, Cannot Continue](#_Toc177035779)

[Automated Transfer Refills button does not result in successful transfer](#_Toc177035780)

[If order is currently in Processing.](#_Toc177035781)

[Automatic Refill Program with an expired and an active plan](#_Toc177035782)

[Prescriptions from expired or active CVS/Caremark plans](#_Toc177035783)

[Prior PBM Rx unable to be refilled](#_Toc177035784)

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| **Scenario** | **Action** | | |
| **Match Rx Number.**  (Cannot locate Rx # on any commercial account.) | 1. Verify that you entered the correct Rx number provided by the member. | | |
| **If…** | **Then…** | |
| Yes | * + Research further as follows:     - Access previous account to verify the prescription number, if applicable.     - Search for a possible new order.     - Verify with the member that the Rx number provided is our Mail Order prescription.     - Verify the member’s information on the **Mail Rx** tab including the date of birth, gender, and spelling of the member’s name. | |
| No | * + Return to [Step 4](#TransferStep4) and re-enter the correct Rx number. | |
|  | 1. If still unable to locate the Rx #, refer to [Compass - Obtaining a New Prescription (Rx) for the Member (New Rx Request) (054208)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a7684ce9-c2bc-4cbc-ab37-c1ffb7789706). | | |
| **Member's Name does not match.** | Compass prompts to confirm if either name is a nickname.  **Example:** Nickname (Joseph & Joey, Robert & Bob) | | |
| **Date of Birth does not match, Cannot Continue.** | Verify member’s personal information.   * If **incorrect**, advise member to contact their **Benefits Office** for the correction to be made to their account. | | |
| **Automated Transfer Refills button does not result in successful transfer.** | Review the prior account to ensure prescriptions on file can be transferred.  **Note:** Controlled substances, and prescriptions that are expired or without refills available **cannot** be transferred.  If there are prescriptions that can be transferred, there is a system error. Create a Support Task, **Task Type:** Refill Request-Offline Refills, to move all the applicable prescriptions over to the new account. Refer to [Compass - Support Task Types and Uses List (058147)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6753488f-3996-45d9-88ba-257575369a98) for additional information.    **Notes:**   * Before submitting the Support Task, close out of the member’s account and then reopen it in Compass. This will sometimes result in the prescriptions populating. * Support Task **MUST** be submitted from the **new/current account**. * Support Task **MUST** be completed under the correct **member’s name**. * Ensure Rx’s have valid refills available. If they do not, refer to [Compass - Obtaining a New Prescription (Rx) for the Member (New Rx Request) (054208)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=a7684ce9-c2bc-4cbc-ab37-c1ffb7789706).   Include the following information in the Support Task notes:   * Member ID from the previous account (where Rx’s currently reside). * Rx numbers for prescriptions that need to be filled today. * Remaining Rx numbers for prescriptions only to be transferred and not filled today. | | |
| **If order is currently in Processing.** | You cannot transfer an Rx that is already in processing, if this is tried you will receive an error stating “No Rx found, please verify Rx #.” An Rx in processing cannot be transferred unless it has been canceled or put on hold first. 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) or [Compass - Cancel or Remove a Prescription (Rx) from an Order (056363)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9c43c276-a6a4-4481-880d-62b194600f02) as needed. | | |
| **Automatic Refill Program with an expired and an active plan.** | When a member would like to take advantage of the Auto Refill Program for prescriptions that were previously listed on their prior, now expired, plan:   * Agent may refill the prescription under the active plan. | | |
| **If…** | | **Then…** |
| Either the expired plan or the active plan was/is not eligible for ARP, Auto Refill/Auto Renewal | | Displays as ineligible. |
| The prescription was ineligible for ARP on the expired plan, and the new plan allows ARP; after a refill is shipped | | The member may enroll the prescription into ARP. |
| The prescription was opted into ARP on the expired plan before converting to the active plan that allows ARP | | The active plan will show the prescription as ineligible.   * + Once the prescription is shipped, it is possible, not guaranteed, the system may auto-enroll that prescription into ARP on the new plan.   + If both the expired plan and the active plan allowed/allow ARP, and the automatic system functionality to create the automatic refill/renewal has not yet run, the prescription will show “RX IN-PROCESS; ENROLL AT A LATER TIME.”   + If the ARP refill/renewal is ready to be processed when the automatic system functionality runs, and the prescription has not yet been moved to the active plan, the expired RX will be moved to the new plan as a new Caremark prescription. |
| **Prescriptions from expired or active CVS/Caremark plans.** | * Prior PBM Prescriptions needing transferred from expired or active plans will show an indicator () and will not be refillable until transferred.      * Prescriptions from expired CVS/Caremark plans are displayed under **Prior PBM Prescriptions** section in the **Mail Rx** tab. * Prescriptions transferred from a previous CVS/Caremark account to a New CVS/Caremark account displays in the Prior PBM Prescriptions list. * When logged into an expired plan, only prescriptions that were a part of that now expired plan display. * When logged into an active plan, the system displays all refillable prior prescriptions from expired plans for the selected member under **Prior PBM Prescriptions**. All valid Prescriptions filled by CVS/Caremark mail order pharmacy are viewable.   + Refillable prescriptions are not discontinued and not expired. Expired and discontinued prescriptions do not display.   + If the member has **Multiple** active plans, the expired plan’s refillable prescriptions display on each active plan.   + If the agent logs into a plan before the plan start date, prescriptions from prior plans do not display.   + Searching by Rx number will display as normal.   + Selecting a prescription that does not need transferred allows the agent to proceed with the Refill/Renewal as normal.   + Selecting a prescription that needs transferred, then clicking **Refill/Renewal** displays the **Rx Transfer Required** screen and allows the agent to transfer the prescriptions to the current plan. For assistance, refer to [Compass - Mail Rx Refill/Renewal (Order Placement) (054262)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad3a7263-725b-4d5d-a2ec-440f1f30d79c).   A screenshot of a computer screen  AI-generated content may be incorrect. | | |
| **Prior PBM Rx unable to be refilled.** | If a Prior PBM Rx is unable to be filled, an () icon will be located next to the **Rx #** hyperlink. Select the checkbox next to the **Rx #** to display the Rx error message.  **Notes:**   * The Rx error message will remain open until the agent dismisses the message. After closing the Rx error message, Compass will deselect the Prior PBM Prescription that was selected. * If no error reason is present in the Rx error message, a link to the Rx’s prescription details is available for more information. * A description of the icon () will be located below the **Prior PBM Rxs** table.   A screenshot of a computer  AI-generated content may be incorrect. | | |

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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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