# Compass - Account Executive Consideration Support Task (AE Support Task)

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**Description:** Steps to follow when submitting an Account Executive Consideration Support Task (AE Support Task). This includes situations in which you are not able to resolve a member inquiry due to incorrect, conflicting, or inaccurate information in Compass.

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| Reminders |

*  Warm transfer to the Senior Team for urgent requests, such as:
  + Member has less than a 10 days’ supply of medication.
  + The inquiry is regarding Specialty Medication.

 **Do not complete an AE Support Task if any of the following situations applies:**

* EGWP account issues should be treated as Medicare-D issues. Contact the Senior Team to ensure the task is submitted under the correct account and the proper expectation is set.
* For issues with adjudication for twins, submit a Support Task, **Task Type**: Multiple Birth. Refer to [Compass - Support Task Types and Uses List (058147)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=6753488f-3996-45d9-88ba-257575369a98) and [Compass - Create a Support Task (050031)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6) for additional information if needed.
* When member is requesting credit for an order where the day supply received less than plan allowable, refer to [Compass - Courtesy Retranslation Support Task (Bulk Up, Downsizing an Rx, and Variable Fill Requests) (058179)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a11f9225-37ee-4af0-83bf-7d492b2006cf).
* For any Mail Tag requests, 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).
* When the Client Information Form (CIF) indicates “No” for administrative overrides, do not send AE Tasks requesting a “one-time” courtesy override as clients have advised that they will not approve these requests.

**Notes:**

* If correction of Deductible, MOOP, MAB Accumulation amounts are needed, submit a Support Task, **Task Type**: CDH Accumulations. Refer to [Compass - Support Task Types and Uses List (058147)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6753488f-3996-45d9-88ba-257575369a98) and [Compass - Create a Support Task (050031)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6) for additional information if needed.
* Clients with dedicated teams may have different directions. Reach out to those teams as instructed in Compass.

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| Identify Member Inquiry |

Complete the following steps:

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| **Step** | **Action** | |
| **1** | Determine if the member inquiry falls within one or more of the following categories:   * Copay paid does not match plan design.   + Fully researched the situation for verification.   **Examples:** Review CIF, Work Instructions, Member’s Recent Cases, Member Alerts, Run Test Claim; Check Benefits.   * CIF or work instruction specifically calls for AE Support Task to be submitted. * Compass Benefits and Plan Design information in the CIF have different information listed. * If an approved Prior Authorization is on file and a claim and/or test claim is rejecting for PA needed. Only after contacting the PA dept and no resolution can be provided should an AE Task be submitted. * Moving a POA/Authorization Release form from an expired account to an eligible account or from one line of eligibility to another.   + Member must have a POA/Authorization Releaseform on file.   + Support Task should be created under the new Member ID.   **Note:** If you are still unsure if an AE Support Task is appropriate, reach out to your supervisor or a Senior Representative for assistance. | |
| **If the member inquiry…** | **Then…** |
| Falls within one or more of the categories listed above. | Proceed to the next step. |
| Does **not** fall within one or more of the categories listed above. | Search for other alternatives. If none can be found, call the Senior Team (CVS Commercial or CVS MED D), or speak to your supervisor to request approval to create the [AE task](#CreateAETask). |
| **2** | Create an Account Executive Consideration Support Task as follows:  Refer to [Compass - Create a Support Task (050031)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6) if needed.  Notes are required, be detailed; include all pertinent information.   * **Task Type:** Account Executive Consideration * **Reason:** (**Example:** Copay paid does not match plan design) * **Notes:** * Must include name and date of the prescriptions, medication name, and date of the order. * Compass auto populates the **Category**. Issues must be submitted under the correct Commercial or Med D plan. (**Example:** Commercial/Medicaid, Med D, etcetera) * Include the original Member ID number if moving a Power of Attorney (POA)/Authorization Release form from an expired account to an eligible account, or from one line of eligibility to another. (The Support Task should be created under the new Member ID.)   **Reminder:** Member phone number is mandatory. Verify the contact telephone number with the caller by reading it back to them. | |
| **3** | After completing the AE Support Task information, click **Save** to submit the Support Task.  **Note:**  The member is called back regarding resolution at the phone number in this Support Task. | |

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| Turnaround Time |

* Standard Request: Up to 5 business days.
* Medicare D and EGWP accounts will experience a different turnaround time based on the situation. Consult with the Senior Team to determine when the member will be contacted.

**Reminder:** Set proper expectations. If this turnaround time is not adequate for the member, escalate via Supervisor or Senior Team following your team’s normal escalation 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)

**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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