# Compass - Same Client Code/Same Id# (Multiple Cardholders)

[Process](#_Toc152590508)

[Resolution Time](#_Toc152590509)

[Related Documents](#_Toc152590510)

**Description:** Use when a planmember is unable to use RxRequest (IVR) or the Member Web Portal due to multiple cardholders with the same client code, or multiple lines of active eligibility.

|  |
| --- |
| Process |

**Reminders:**

* The employer client code must be the same. Two different client codes cannot be merged.
* Dependent to Cardholder can be merged; however, cardholder to dependent cannot be merged.
* The Member ID must be the same. Two different Member IDs cannot be merged.
* Termed files cannot be merged.

If the plan member is unable to use RxRequest or the Member Web Portal due to multiple cardholders with the same client code, or multiple lines of active eligibility, follow the steps below:

|  |  |
| --- | --- |
| **Step** | **Action** |
| **1** | Access Compass and access the plan member’s account using the appropriate ID number. |
| **2** | Assist the plan member based on their request.   * If request is for a refill of a prescription found under the same client code/same ID, create an Offline Refill request task:   + **Task Type:** Refills Request – Offline Refills   + **Reason:** System Error on Refill Screen   + **Assigned Pharmacy:** Dispensing Pharmacy   + **Shipping Address:** Enter confirmed shipping address.   + Method of payment (if applicable). Refer to [Compass - Add, Edit, and Delete Mail Order Payment Methods (Credit Card & eCheck) (056289)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a1a67eb-a7b1-4ae5-bcfe-e986bbe4aa3d) as needed.   + **Drug Names:** Include Rx number(s) and Rx name(s) in this field.   + Address Verified (Must be verified and noted in comments for processing).   + Alternate shipping address (if applicable).   + Place the following comments in the **Notes** box: “Plan member unable to use RxRequest or Member Web Portal due to multiple lines of eligibility.” |
| **3** | Create Support task to merge the two lines of eligibility:   * **Task Type**: Multi Cardholder * **Multiple Cardholder Issue:** Same Carrier/Member ID * **Action Required:** Merged 2 lines of Eligibility |
| **4** | Offer the member a callback once the request has been processed.   * If member agrees, follow the procedure for [Participant Callback Request (010590)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1deb6339-c28a-4591-bb3c-c244a0c0fcdf).   **PeopleSafe Users:** If member agrees, follow the procedure for [Member Callback Request in Compass - Create a Support Task (050031)](https://thesource.cvshealth.com/nuxeo/nxfile/default/64f18e5a-4d56-4175-ba8e-e7d094e501d6/ncf:generated_pdf/GEN%2050031%20Compass%20-%20Create%20A%20Support%20Task%20%20pulled%2001212025%20for%20Feb%202025%20SWR%20approved%2001302025.docx.html?changeToken=27469-0&inline=true#_Toc190955863)  **Compass Only Users:** Contact a supervisor to submit the Participant Callback Request   * If a member declines the callback, advise them that they can call Customer Care 24 hours a day, 7 days a week to check the status.   **Note:** Member should be encouraged to only callback after the 5-business day TAT. |

[Top of the Document](#_top)

|  |
| --- |
| Resolution Time |

Up to five business days.

[Top of the Document](#_top)

|  |
| --- |
| Related Documents |

[Customer Care Abbreviations, Definitions and Terms Index (017428)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c1f1028b-e42c-4b4f-a4cf-cc0b42c91606)

[HIPAA Grid (028920)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce)

**Parent Documents:**

[CALL 0049 Customer Care Internal and External Call Handling](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0049)

[CALL 0011 Authenticating Caller](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0011)

[Top of the Document](#_top)

Not to Be Reproduced or Disclosed to Others without Prior Written Approval

**ELECTRONIC DATA = OFFICIAL VERSION – PAPER COPY – INFORMATIONAL ONLY**