# Compass - Primary Interaction Reason (PIR)

[Selecting the PIR During Call Opening (Guided Authentication)](#_Toc205809967)

[Changing the PIR During Call Documentation (Close Case Pop-Up)](#_Toc205809968)

[Changing the PIR from the Case Details Tab](#_Toc205809969)

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**Description:** Use this work instruction to help determine the appropriate Primary Interaction Reason for the call. The Primary Interaction Reason popup allows you to continue assisting the caller while Compass is loading the member's account. The Primary Interaction Reason popup assists with reporting to help the business understand call reasons. In most cases, “Other” should NOT be selected.

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| Selecting the PIR During Call Opening (Guided Authentication) |

Follow the steps below:

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| **Step** | **Action** | |
| **1** | Successfully authenticate the member’s account.  **Result:** The Primary Interaction Reason popup displays. | |
| **2** | Select the appropriate **Primary Interaction Reason** option. | |
| **3** | Select the appropriate **Primary Interaction Reason Detail** option, then click **Continue**.  **Reminder:** Complete all required fields on the PIR popup.  **Note:** Review the following table for Primary Interaction Reason Detail options: | |
| **Primary Interaction Reason** | **Primary Interaction Reason Detail** |
| **Account Maintenance** | * Account Updates * ID Card/Forms * Web Support * Other |
| **Claim Inquiry** | * Paid Claim * Rejected Claim * Other |
| **Eligibility** | * Check Eligibility * Medicare Enrollment * Processing Information * Other |
| **Financial Inquiry** | * Balance/Payment * Payment dispute * Premium Billing * Reimbursement * Other |
| **Plan Design** | * Drug Cost/Coverage * Override * PA/Appeals * Pharmacy Network * Programs * Other |
| **Rx/Order Management** | * Refill/Renewal/NewRx * Rx/Order Status * Rx/Order Updates * Rx Transfer * Shipment Issues * Other |
| **Other** | * Communications * Other |

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| Changing the PIR During Call Documentation (Close Case Pop-Up) |

Follow the steps below:

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| **Step** | **Action** |
| **1** | Click the **Close Case** button in the Case Data panel.    **Result:** The Close Case popup displays. |
| **2** | Select the appropriate **Primary Interaction Reason** option. |
| **3** | Select the appropriate **Primary Interaction Reason Detail** option. |
| **4** | Complete all required fields. |
| **5** | Click the **Close Case** button. |

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| Changing the PIR from the Case Details Tab |

Follow the steps below:

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| **Step** | **Action** |
| **1** | Navigate to the **Case Details** tab. |
| **2** | Click any **pencil** icon in the **Case Details** section .  Do not make changes in the **Case Owner** field.  **Result:** The **Case Details** section becomes editable. |
| **3** | Select the appropriate **Primary Interaction Reason** option. |
| **4** | Select the appropriate **Primary Interaction Reason Detail** option. |
| **5** | Click **Save**. |

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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" \t "_blank)

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