# Compass - Being a Power House - Submitting Support Tasks

[Process With an Existing Claim in Compass](#_Toc168380991)

[Process Without an Existing Claim in Compass](#_Toc168380992)

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**Description:** Steps to open a Support Task (formerly known as Resolution Manager [RM] Task) with or without an existing claim in Compass.

 The following Support Tasks cannot be submitted from the **Create Support Task** button (they can only be submitted via Automation):

* Reship
* Payment Dispute
* Invoice Copy

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| Process With an Existing Claim in Compass |

Perform the steps below:

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| **Step** | **Action** |
| **1** | Verify that there is an existing Support task for the issue in question by accessing the Case Details Landing Page. Using the scroll bar between the two panels, scroll down to the Member’s Recent Support Tasks section and click the **View All** hyperlink.  **Result:** Any existing Support Tasks display under the Support Task header. |
| **2** | Review the Type column to determine if there were any pervious Support Tasks related to the current issue.   * If not, proceed with creating a new support task with an existing claim in Compass. * If yes, click the corresponding hyperlink to open the Support Task and provide details. Refer to [Compass - View Support Task History (050044)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1674c564-fc41-42ad-a7c2-f3b610716cba)   **Note:**  The list displays Support Tasks associated with the current member ID and does not include linked accounts. If the member has multiple accounts, each account must be searched separately. Click the **Refresh** hyperlink to view recently submitted Support Tasks as needed. |
| **3** | Create the support task.  Two options exist for creating a Support Task from an existing claim.  Option 1: From the **Claims Details**tab, click the **Create Support Task**button in the top-right corner of the screen.    Option 2: From the Claims Landing page, use the **Row Level Action**dropdown to create a Support Task from the appropriate existing claim.    **Result:** The New Support Task: Support Task window displays.   * If need assistance in determining which Support Task type is appropriate, refer to [Compass Support Task Types and Uses List (058147)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6753488f-3996-45d9-88ba-257575369a98).   **Note:**Fields containing an asterisk (\*) are required. For additional information regarding the fields, refer to [Compass - Create a Support Task (050031)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6). |
| **4** | 1. Review and confirm all information in the required fields of the task with the caller. 2. Review the complete drug name, strength, dosage form, and directions.   Icon_-_Important_Information A Class 1 Error can result from submitting the task with the incorrect drug, strength, dosage, or information which are escalated to management for review.   1. After completing all required fields, click **Save**. |

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| Process Without an Existing Claim in Compass |

Perform the steps below:

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| **Step** | **Action** |
| **1** | Verify that there is an existing Support task for the issue in question by accessing the Case Details Landing Page. Using the scroll bar between the two panels, scroll down to the Member’s Recent Support Tasks section and click the **View All** hyperlink.  **Result:** Any existing Support Tasks display under the Support Task header. |
| **2** | Review the Type column to determine if there were any pervious Support Tasks related to the current issue.   * If not, proceed with creating a new support task with an existing claim in Compass. * If yes, click the corresponding hyperlink to open the Support Task and provide details. Refer to [Compass - View Support Task History (050044)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1674c564-fc41-42ad-a7c2-f3b610716cba)   **Note:**  The list displays Support Tasks associated with the current member ID and does not include linked accounts. If the member has multiple accounts, each account must be searched separately. Click the **Refresh** hyperlink to view recently submitted Support Tasks as needed. |
| **3** | From the **Case Data** section that displays on all Compass screens, click the **Create Support Task** button then proceed to the next step. |
| **4** | Include any information as required for the task.  **Note:** Required fields are identified with an asterisk (\*).   * If need assistance in determining which Support Task type is appropriate, 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 regarding the fields, refer to [Compass – Create a Support Task (050031)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6). |
| **5** | 1. Review and confirm all information in the required fields of the task with the caller. 2. Review the complete drug name, strength, dosage form, and directions.   Icon_-_Important_Information A Class 1 Error can result from submitting the task with the incorrect drug, strength, dosage, or information which are escalated to management for review.   1. After completing all required fields, click **Save**. |

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| Related Documents |

* [Customer Care Abbreviations and Definitions Index (017428)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c1f1028b-e42c-4b4f-a4cf-cc0b42c91606)
* [Be a Customer Care Power House Index (008982)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7b0390db-a2ed-4307-b9c5-b842130225e9)

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

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