# Compass - Research Case vs. Interaction Case Job Aid

[Research Case vs. Interaction Case Comparison Table](#_Toc205825275)

[Related Documents](#_Toc205825276)

**Description:** Outlines the main differences between a Research Case and an Interaction Case in the Compass system, to assist with deciding whether you should open one type of case or the other.

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| Research Case vs. Interaction Case Comparison Table |

Refer to as needed:

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| **Topic/**  **Question** | **Interaction Case** | **Research Case** |
| **What is the main purpose of an Interaction Case vs. a Research Case?** | An **Interaction Case** allows the user to assist the caller with managing the member’s account.   * Only one (1) **Interaction Case** can be open at a time. * An **Interaction Case** allows the user to submit Support Tasks.   **Do Not** select “I am working offline (no active call)” when performing a Manual Member Search while on an inbound call. | A **Research Case** allows the user to perform research on a member’s account.   * The default maximum limit on the number of **Research Cases** that a user can have open at once is five (5). * A Research Case **does not** allow the user to submit a Support Task. |
| **What are the functionality differences between an Interaction Case and a Research Case?** | Actions that can be performed in an **Interaction Case** include all actions that can be performed in a Research Case.  Actions that can be performed in an **Interaction Case only** include, but are not limited to:   * Adding Coordination of Benefits (COB) * Adding/Editing Medicare B Enrollment * Adding Medicare D Alerts through the Medicare D Landing Page * Adding/Editing Payment Methods * Editing Mail Order Preferences within the Mail Order Profile * Editing/Adding Messaging Preferences, Email, Phone Numbers, Address, etc. * Entering/Editing Overrides * Selecting the Out In/Opt Out option for the Medicare Prescription Payment Plan (M3P tab) * Sending Tic Letters * Submitting a Grievance * Submitting a Reship * Submitting an ePA * Submitting Coverage Determination   **Note:** All functionalities a user is provisioned for are available in an Interaction Case. | Actions that can be performed in a **Research Case** include:   * Running Test Claims * Using the Dosage Calculator * Performing a Pharmacy Search * CVS Retail Inventory Search * Member Resources * Viewing and checking the status of:   + New Rx Request   + Override/PA History   + Paper Claims   + Claim History   + Benefits   + Coverage Determination   + Grievance History   + Coordination of Benefits   + Communication History   + Case Details (limited information displays)     Actions that **cannot** be performed in a **Research Case** include **Automated Support Tasks**.  The following **Automated Support Task** buttons will be disabled:   * **Mail Rx Tab** * Transfer Mail to Retail * Early Refill * **Order Details screen - Rx Actions, Order Actions,** and **Support Tasks dropdowns** * Return * Extra Bottle * Reverse & Reprocess * Rx Copy * Invoice Copay * Bulk Up * **Current Balance - Mail Order Payment History** * Payment Dispute Button * Payment Dispute Row Level Action   **Note:** Based on your permissions within the system, you may have more ability to perform additional tasks in a Research Case (the system displays what is enabled and disabled). |
| **What happens when I open an Interaction Case vs. a Research Case?** | From the Access Member Information screen, the drop-down field will default to **Interaction Case**.     * **Do Not** select “I am working offline (no active call)” when performing a Manual Member Search while on an inbound call. * When the **Accessing Member Information** pop-up displays, select **Interaction** or **Research Case** from the dropdown menu. * Only agents who are working offline should check the “I am working offline (no active call)” checkbox.   A screenshot of a computer  AI-generated content may be incorrect.   * 1. Click **Continue** to populate the **Guided Authentication** screens.   2. Once authentication is complete and you have selected the **Primary Interaction Reason**, click **Continue** again.   **Result:** The member’s account will open on the Member Snapshot Landing Page.  For more information on authentication refer to [Compass Guided Caller Authentication (050163).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=80476f74-7dca-4548-bf35-185ca8d45c13)  A screen shot of a computer  AI-generated content may be incorrect.  A screenshot of a computer  AI-generated content may be incorrect. | From the Access Member Information screen, the drop-down field will default to Interaction Case.  Select **Research Case** and then click **Continue**. The members’ account will open on the Member Snapshot Landing Page.  A screenshot of a computer  AI-generated content may be incorrect.  A screenshot of a computer  AI-generated content may be incorrect. |
| **What can I do from the Quick Actions panel in an Interaction Case vs. a Research Case?** | While in an **Interaction Case** on the Claims Landing Page, the following **Quick Actions** panel hyperlinks will be active:  A blue and white background with text  AI-generated content may be incorrect.  **Claims Landing Page - Active hyperlinks:**   * Current Balance * Create Override/PA * Rxs Accessed in IVR (if applicable) * SCC Overrides * New Rx Request * Override/PA History * Paper Claim Viewer * Dosage Calculator * Client Program Offerings * Coordination of Benefits (COB) * Pharmacy Search * Member Resources * Member Journey * CVS Retail Inventory Search   While in an **Interaction Case** on the Medicare D tab, the following **Quick Actions** panel hyperlinks will be active:  A screenshot of a computer  AI-generated content may be incorrect.  **Medicare D Tab - Active hyperlinks:**   * CMS MARx Portal * FAZAL Portal * Last 12 Months of Communication * Medicare D Letter(s) pre 5/2020 * NEJE Portal * NYBEAS Portal * RxEnroll Care   While in an **Interaction Case** on the Member Snapshot Landing Page, hyperlinks will be active and vary based on the account/client.  A screenshot of a computer  AI-generated content may be incorrect. | While in a **Research Case** on the Claims Landing Page, the following **Quick Actions** panel hyperlinks will be active/inactive:  A close-up of a computer screen  AI-generated content may be incorrect.  **Claims Landing Page - Active hyperlinks:**   * Current Balance * Rxs Accessed in IVR (if applicable) * SCC Overrides * Override/PA History * Paper Claim Viewer * Dosage Calculator * Client Program Offerings * Coordination of Benefits (COB) * Pharmacy Search * Member Resources * Member Journey * CVS Retail Inventory Search   **Claims Landing Page** **- Inactive/Disabled hyperlinks:**   * Create Override/PA * New Rx Request   While in a **Research Case** on the Medicare D tab, the following **Quick Actions** panel hyperlinks will be active:  A screenshot of a computer  AI-generated content may be incorrect.  **Medicare D Tab - Active hyperlinks:**   * CMS MARx Portal * FAZAL Portal * Last 12 Months of Communication * Medicare D Letter(s) pre 5/2020 * NEJE Portal * NYBEAS Portal * RxEnroll Care   While in a **Research Case** on the Member Snapshot Landing Page, hyperlinks will be active and vary based on the account/client. The following **Quick Actions** panel hyperlink will always be disabled:   * Submit New Grievance.   A screenshot of a computer  AI-generated content may be incorrect. |
| **What happens when I close an Interaction Case vs. a Research Case?** | When closing an **Interaction Case**, in the Close Case window, all fields with an asterisk (\*) are required. These fields are:   * Reason for Closing Case * Resolution Response * Primary Interaction Reason * Primary Interaction Reason Detail * Communication Direction * Indication of previous contact on this topic?   Once all required fields are complete, click the **Close Case** button.  A screenshot of a computer  AI-generated content may be incorrect. | When closing a **Research Case**, in the Close Case window, you can add notes in the **Case Comments** field before you click **Close Case**.  A screenshot of a computer screen  AI-generated content may be incorrect. |

[Top of the Document](#_top)

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| Related Documents |

* [Compass - Member Snapshot Landing Page (050036)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3b8c0f76-42f3-4cf5-8dc9-6f7c6f0d67fb)
* [Compass - Claims Landing Page (049993)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c8f0ac8f-b076-4187-944d-2cf65b0ec799)
* [Compass MED D - Medicare D Landing Page (061525)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a2168484-0af3-4e35-88f0-1110e61c4868)
* [Customer Care Abbreviations, Definitions, and Terms Index (017428)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c1f1028b-e42c-4b4f-a4cf-cc0b42c91606)

[Top of the Document](#_top)

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