# Compass and Other Documents - Frequently Accessed Documents (Greatest Number of Views)

[Compass - Documents with the Greatest Number of Views](#_Toc155883917)

[Documents with the Greatest Number of Views](#_Toc155883918)

[Related Documents](#_Toc155883919)

**Description:** Provides titles, hyperlinks and descriptions to documents with the greatest number of views in alphabetical order. If you find yourself looking for the same documents, **bookmark** the document in Google Chrome for easy reference in the future!

|  |
| --- |
| Compass - Documents with the Greatest Number of Views |

**Note:** This list was identified by reviewing reports that indicate the total number of times that a document was viewed. The highest reviewed documents are listed below.

|  |  |
| --- | --- |
| **Document Title with Hyperlink** | **Provides…** |
| **Compass - Add, Edit, and Delete Mail Order Payment Methods (Credit Card & eCheck)**  [TSRC-PROD-056289](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a1a67eb-a7b1-4ae5-bcfe-e986bbe4aa3d) | Provides the process to add, edit, and delete credit cards and eChecks for payments of prescriptions on the member’s account in Compass. The Mail Order Payments tab in Compass gives the agent the ability to view all payment method types listed on the account. |
| **Compass - Basic Call Handling – Opening the Call, Call Hold, Warm and Cold Transfer**  [TSRC-PROD-066076](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=18c64566-0ebb-4760-96fe-04da06185de0) | How to accept and redirect inbound calls within Compass regarding a plan member’s prescription benefit plan |
| **Compass - Customer Care Document Index**  [TSRC-PROD-058484](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5adafaf7-02a1-49b8-b58b-3abceda07ad2) | Hyperlinks to Compass documents. |
| **Compass - Guided Caller Authentication**  [TSRC-PROD-050163](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=80476f74-7dca-4548-bf35-185ca8d45c13) | Guided Caller authentication steps and functionality for Compass. |
| **How to access the Compass Production Environment (Log In, Log Out, Check for Open Cases)**  [TSRC-PROD-050012](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a89e3bd-1ddc-4466-bd1b-93f0cbe17013) | Steps for accessing the Compass Production Environment, including logging in, logging out, and checking for open cases. |
| **Compass - Log In (Login) and Out of Five9**  [TSRC-PROD-056724](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f143ae89-173a-4c0c-a2f4-0be0d45ad858) | Provides CCRs with the steps to log in and out of Five9 in Compass. |
| **Compass – Log In (Login) to Compass Using CVS Multi Factor Authentication (MFA) with SiteMinder**  [TSRC-PROD-056719](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=647f7523-3f45-43f1-8564-3551d316cb8c) | Provides the steps to log in to the Compass production environment using CVS Multi Factor Authentication (MFA) with SiteMinder. |
| **Compass - Mail Order History / Order Status**  [TSRC-PROD-056369](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0ad0ab77-cb2e-4521-8f97-659304a0c8f8) | Steps to use when researching the status of a Mail Order. Orders on the Mail Order History tab indicate the order has adjudicated (processed through member’s insurance). The Mail Order History table will show the status of the orders after adjudication. |
| **Compass - Mail Rx Refill/Renewal (Order Placement)**  [TSRC-PROD-054262](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad3a7263-725b-4d5d-a2ec-440f1f30d79c) | Process used when a plan member contacts Customer Care to refill a Mail Order prescription or renew a previous Mail Order prescription. |
| **Compass - Maintenance Choice (MChoice) Opt Out**  [TSRC-PROD-053799](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=071ddb5a-1f72-4cef-baa6-5164c512e782) | Instructions for Customer Care to review the member's plan for the Maintenance Choice (MChoice) Opt Out provision and to Opt Out the member from Mandatory MChoice and Mandatory Mail plan requirements when available. |
| **Compass - Obtaining a New Prescription (Rx) for the Member (New Rx Request)**  [TSRC-PROD-054208](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a7684ce9-c2bc-4cbc-ab37-c1ffb7789706) | Process on how to start the member's prescription at Mail Order in Compass. |
| **Compass - Override / PA History**  [TSRC-PROD-050015](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=74e6ea18-d5de-4ba0-9529-5d452f814e93) | Outlines the Override / PA History tab and Override Details screens in Compass. |
| **Compass – Plan Benefit Override (PBO) Guide**  [TSRC-PROD-061708](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=44418b02-7e70-41cc-bb2e-bb38164a951f) | Instructions for handling override requests. A Plan Benefit Override (PBO) bypasses the general plan design limitations by permitting a claim to pay and allowing a covered medication to be filled. |
| **Compass and PeopleSafe - Prior Authorization, Exceptions, Appeals Guide**  [TSRC-PROD-063978](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=657ddfe3-27d1-4a21-8f51-8cbd3961001c) | Process steps to ensure agents are determining if a Prior Authorization or Clinical Exception is appropriate, and an index of links to specific Prior Authorization, Clinical Exception, and non-Clinical Exception specific process documents. This document applies to both Compass and PeopleSafe. |
| **Compass - Prescription (Rx) Transfer**  [TSRC-PROD-053932](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1e31ea60-77a3-4bb9-a619-7340ebf57484) | How to transfer a Retail pharmacy prescription (Rx) to our Mail Order pharmacy and outlines the steps for agents to open an automated Support Task (formerly known as Resolution Manager [RM] Task/Service Resolution) with an existing claim in Compass. (This process is just initiating the request.) |
| **Compass- Rejection Codes and Resolutions (Reject 01-Reject ZN)**  [TSRC-PROD-067649](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=104c3318-95ba-42e2-bd05-17877b0a8045) | List of rejection codes, the reason for the rejection and how to resolve the issue. It is used to support the Pharmacy Help Desk callers with questions about rejections. |
| **Compass - Test Claims**  [TSRC-PROD-050041](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=60c20ea0-1d07-46e3-809a-b54734b80fbe) | Steps regarding when and how to run and/or perform a Test Claim (a tool to estimate cost and coverage) in Compass. |
| **Compass - Viewing Accumulations**  [TSRC-PROD-050010](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c4fb8a09-f22f-49cd-a22d-71930039f08c) | Steps to view Accumulations in Compass. |

[Top of the Document](#_top)

|  |
| --- |
| Other Documents with the Greatest Number of Views |

**Note:** This list was identified by reviewing reports that indicate the total number of times that a document was viewed. The highest reviewed documents are listed below.

|  |  |
| --- | --- |
| **Document Title with Hyperlink** | **Provides…** |
| **Caremark.com – Work Instruction/Job Aid Index**  [CMS-PRD1-105672](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=8a2da44a-6336-454d-8deb-fca4a71ad69b) | This document contains commonly used instructions to assist a representative with Caremark.com inquiries |
| **CVS Weight Management Program (At Scale)**  [TSRC-PROD-064264](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=2be10319-19b6-41cc-b113-989e1cd49a5e) | Provides information and procedures as it relates to the CVS Weight Management program (At Scale), how it is defined, including the benefits to the members and frequently asked questions and answers. |
| **Disconnected, Dropped, No Caller (Ghost Calls), Spam, Automated, and Looping Calls**  [CMS-PCP1-021760](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=480af287-dcb8-4305-84c5-dfe8e0c39312) | Procedures for when a caller has been disconnected or the line has been dropped. Includes instructions for when no caller is on the line (ghost calls), spam/fake calls, when the caller walks away from the phone, and when the caller has not disconnected at the end of the call and procedures for Vendors on how to report phone problems. |
| **HIPAA (Health Insurance Portability and Accountability Act) Grid - CVS**  [CMS-2-028920](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce) | Personal and System information that you may or may not perform or provide information depending on your caller type. |
| **Member Cannot Afford Medication (Alternatives and Financial Assistance)**  [CMS-PCP1-026963](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=62aa67ac-8298-4fa1-b1ba-fda383d15b4c) | Use when a member states that they are not able to afford the cost of a prescription. This includes the sources that members can follow to determine if they are able to receive financial assistance. |
| **Phone Numbers (Contacts, Departments, Directory, Addresses, Hours and Programs)**  [CMS-2-004378](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f22eb77e-4033-4ad9-9afb-fc262f29faad) | Contact list. |
| **Using Verint**  [TSRC-PROD-056210](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d9eec58d-f754-497f-b253-ced75bac8770) | Instructions for using Verint. |
| **2025 Customer Care Agent Goals**  [CMS-PRD1-115916](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9391163d-805a-4b1c-b7e3-532bd914aab3) | Customer Care Agent Goals |
| **2025 WECare Companion Guide – WECare Quality Call Evaluation Overview for Care Representatives**  [TSRC-PROD-062683](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=384f024c-c33b-426c-8a40-258ba6023d9d) | Outlines the WECare process, providing insight into the various categories and criteria used to evaluate calls. Additionally, included in each category are tips for how to be successful. Every time we speak with someone, it’s an opportunity to be HUMAN, and demonstrate our Helping With Heart (HWH) Behaviors and show How We Care. |
| **Universal Care - Caller Authentication**  [CMS-2-004568](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bcb8da72-5501-4631-b9fd-fe675bc4a1fd) | How to take reasonable steps to verify a person’s identity before disclosing PHI. It outlines guidance from the Privacy Office and provides the talk tracks and procedures when making outbound calls from Customer Care. |
| **Universal Care - Consultative Call Flow (CCF) Process**  [CMS-PRD1-095822](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c954b131-7884-494c-b4bb-dfc12fdc846f) | Foundation that gives representatives control of their call and helps them to create a positive caller experience. |

[Top of the Document](#_top)

|  |
| --- |
| Related Documents |

[theSource Bookmarks in Google Chrome (015435)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=3eb68d2a-1f2b-4bef-8ef1-fbba50790e85)

[theSource Resources (006162)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=5df6ae0e-19e8-42f5-b096-426aa4e5bab8)

[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**