# PeopleSafe - Payment Change Payment Method for an Open Order

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**Description:** Instructions for changing the method of payment for an open order. An order is considered “open” if it is **NOT** in the Label Printed status or further along in the process.

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| Change Payment Method for an Open Order |

The following payment types can be changed in an open order:

* Credit card
* Electronic check
* Installment Payment (Client Specific)

**Note:** If someone is calling on behalf of an adult member (18 or older), no changes to the account can be made by the caller. Caller can apply a payment to the order/account. Caller may not change default payment or remove payment.

Perform the steps below:

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| **Step** | **Action** | | |
| **1** | Click the Order Number from the **Main** Screen.    **Result:** **Order Status** screen displays. | | |
| **2** | Determine the order status. | | |
| **If…** | | **Then…** |
| Order is Scanned or Entered Status | | Proceed to [Step 3](#Three). |
| Status is Label Printed, Dispensing, Packed, Metered, or Shipped Status | | Payment information cannot be updated at this time. Have the member call Caremark after order has been shipped or go to Caremark.com to update credit card and pay balance online.   * If the member is wanting to change what payment method was used for the order, after it has shipped, refer to [Balance Transaction History/Payment Dispute (Home Delivery/Mail Order Claims Only) (004578)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ba2c70ed-7f0c-4779-98b6-9bc1eb9bbb1f). |
| **3** | Identify the current payment displayed in the **Payment Information** box and confirm that the member would like to use a different electronic payment method for the order.  **Note:** In the **Order Status** screen, click the white arrow next to the Shipping Information to open the **Payment Information** box. | | |
| **If the current payment type is…** | | **Then…** |
| An electronic method of payment (Credit Card or E-Check) | | Proceed to [Step 4](#Step4Determine). |
| Please **Add Payment** | | This means that no payment type is currently attached to the order.   * Proceed to Step 4 to add a payment account. |
| **Note:**  Any payments received with the order (**Example:**  Paper checks or money orders) displays in the **Other Payments Applied** field.   * Advise the member that a check was applied to the order, and if it is not enough to cover the cost of the order, they may receive a call for payment or a bill with the shipped order. * They can check the status of the order and apply payments online at Caremark.com. | | |
| **4** | Determine if the payment method is on file by clicking on the **Payment Method** drop down field to view the member’s available payment methods.  **Note:** If attempting to apply apartial balance to an FSA card, complete a [Split Payment (017747)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=94965c2d-81bf-4a50-86b8-861c54728cae) as an option for the member.  Verify the last 4 digits and expiration date of the payment method. | | |
| **If…** | **Then…** | |
| On file | Proceed to [Step 5](#Five). | |
| Not on file/Expired | The new payment method will need to be added or the existing method updated.  Click on the **Maintain Payment Options** button to add the [electronic payment account (010987)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b0d1693e-3ebd-45e7-811a-adbe7e2c9f83).  Once the payment account has been added or updated, continue to Step 5. | |
| **5** | Select the appropriate payment type from the **Payment Method** drop downbox.  **Result:** New payment method displays in the **Payment Method** field.  **Notes:**   * Default payment method will display the word “DEFAULT” in the **Payment Method** list.   + - If the payment method is **NOT** set as default, the following pop-up displays. Ensure the correct account is selected, and to update to the default status if appropriate.      * Exclusive payment methods display the word “EXCLUSIVE” in the **Payment Method** list. An Exclusive pop-up displays when an exclusive account is selected but the originator is not a part of the order.   + - It is okay to use an exclusive account to pay for other family member’s orders, but **ONLY** with the originator’s permission.     - Ask if the originator is available to speak with you for a moment to authorize the transaction. If not available, suggest that a different payment account be used or add the original payment method back to the order and advise the originator to contact us as soon as possible to make the change.   **Notes:**   * POAs are authorized to act on behalf of the member and can apply payments to an exclusive account. * In situations in which there is custody of a dependent, non-member calling on behalf of the member, etcetera, if the call is fully authenticated and the caller can verify the payment account information, continue with applying the payment to the exclusive account. * Seek assistance if you are unsure or feel that the situation may lead to unauthorized use of the account. * Proceed to the next step.   **Note:** In order to use the **Installment Payment** option, there must be a default method of payment on file. This method of payment cannot be an FSA, HSA, or HRA account. The following pop-up displays when selecting the **Installment Payment** option.    Icon - Important Information If an outstanding balance is displayed in the **Previous Account Balance** field, inform the member of the previous amount due that will be charged along with the amount due for their current order. | | |
| **6** | Click **Update** to save your changes.  **Result:** New payment type displays in the **Payment Method** field. | | |
| **7** | Click **Close** to return to the **Main** screen.  **Note:** If the open order was held due to payment exception, utilize both [Order Status - Payment Exceptions (021319)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=445b2dd4-59b7-4ddb-bd4e-b15b3b665989) and [Manage / Resolve Diverts - Immediate Release of Orders (117593)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e655c92e-f73e-4069-a5d5-2804e4278124) to release the order. If the order was placed on Indefinite Hold due to not having the payment exception managed in time, order the medication via the Order Placement Tab. | | |

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| Resolution Time |

Immediate

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| Related Documents |

[Log Activity (042891)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=08023401-0eee-4e2b-97fe-f0bc7c5aa2f0)

[Billing & Payments Index (049663)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=be58f9e6-2fde-4398-bce1-6f862189f89c)

[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)

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