# Compass - Add / Edit / Delete Phone Number

[Adding a Phone Number](#_Toc204230542)

[Editing a Phone Number](#_Toc204230543)

[Deleting a Phone Number](#_Toc204230544)

[Related Documents](#_Toc204230545)

**Description:** How to add, edit, and delete a member’s phone number in Compass.

 If the caller is a **MED D Beneficiary**, follow the steps found under [MED D - Email and Phone Number Changes (112972)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e0799360-70cd-4d44-a8b0-3112e61449f3).

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| Adding a Phone Number |

 If multiple phone numbers are listed on the member's profile, delete any duplicate or additional phone numbers that are no longer applicable to the member. Refer to [Deleting a Phone Number](#_Adding_a_Plan) section below.

Perform the following steps if a member requests that a phone number be added on their account:

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| **Step** | **Action** | | |
| **1** | Verify that the caller has authorization to add the member’s phone number.   * As needed, advise the caller you can only update their individual phone number and for their minor children.   **Authorization Notes:**   * Review Member Alerts to determine if there are phone number–related restrictions on the account. If restrictions exist, take note of which members are affected and adhere to the restrictions.   Authorized party callers (benefits offices, prescribers, individuals calling on behalf of the member, etcetera) are **not** authorized to make phone number changes **when placing an order**. Only members (and designated individuals such as POAs) can make these requests.  Confirmation is required from the other adult members on the account before their phone number can be added or changed. If needed, ask if the other adult members are available to make changes during the call.   * + If the other adult member comes on the line to approve the caller to update contact information, you must have the member re-authenticate before making any changes.   + If the other adult member is unavailable, advise the caller that they can call back or update their phone number individually on the Member Web Portal. | | |
| **2** | From the Member Snapshot Landing Page, navigate to the **Contact Information** tab, Phone Number section, and click **View All Phone Numbers**.    **Result:** The **Phone Numbers** popup displays. | | |
| **3** | Obtain the member’s new phone number and review the phone numbers on file. | | |
| **If the new phone number is...** | **Then...** | |
| Not listed | Click **Add** and then proceed to [Step 4](#Step4). | |
| Listed | Verify that the phone number in the system is correct, including the Type, any necessary Extension, or Contact Preference information:   * If **yes**, no further action is needed. * If **not**, proceed to the [Editing a Phone Number](#_Editing_a_Phone) section. | |
| Listed, but the system indicates it is invalid | Advise the caller that the phone number has been flagged as invalid. This occurs if the Messaging Platform attempted to contact the plan member twice, but the phone was disconnected, busy, or did not have voicemail.  Verify that the phone number in the system is correct:   * If **yes**, click **Reset**.   **Note:** The “phone icon with the slash in the middle” likely indicates that the phone number is invalid or no longer in service. When this icon displays, go to the specific row in the system and select ‘Reset’ from the row-level action menu.    * If **no**, proceed to either the [Editing a Phone Number](#_Editing_a_Phone) or [Deleting a Phone Number](#_Deleting_a_Phone) section. | |
| **4** | In the Add Phone Number popup, type the new phone number in the **Phone Number** and (if applicable) **Extension** fields, and then select the **Type** (**Mobile** or **Other**).  **The system displays an error if the phone number is not in the correct format or if it includes an invalid Area Code.** | | |
| **5** | Ask the member their contact preference and click the appropriate checkbox(es):   * **Daytime:** Calls in the AM * **Nighttime:** Calls in the PM * **Text Messages:** Receive a text message (only select for mobile phone numbers) | | |
| **6** | Repeat the phone number back to the member to ensure it is correct, and then click **Add**.    **Results:**   * A message displays: “Phone number was successfully added.” * A popup will display the following message: “Reminder: Update member’s messaging preferences when updating phone number.” Click **Close** to exit the popup. Contact information and Messaging Preferences are located at the top middle panel of the Member Snapshot. Refer to [Compass - Obtaining an Email Address and Managing Messaging Platform (MP) Notifications (054195)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=16d97031-aab3-4e30-b5d8-69ba322678d6) to update messaging preferences. | | |
| **7** | Remind the member and adult dependent to also change their phone number with their Benefit’s office. Otherwise, it is possible for their phone number to default back to the number they have on file with the Benefit’s office. | | |
| **8** | Complete the **Apply Changes to Other Members** popup as needed. This popup only displays when a phone number is added, and any other adult member(s) are listed on the account.  **Note:** Minor children will share a phone number with the primary cardholder. | | |
| **If the caller wants to…** | | **Then…** |
| Add the phone number only for themselves | | Click **Cancel**. |
| Apply changes to other adult members | | Read the disclaimer at the bottom of the popup to the caller: “We cannot change phone numbers for other adults without receiving their verbal consent. If they are unavailable, they can call back or update their phone number on the Member Web Portal.”  If the other adult member comes on the line to approve the caller to update contact information, re-authenticate the member before making any changes.  Only after you have received verbal consent or confirmed that the caller has authorization (legal documentation like a POA must be on file) to add the phone number for an adult member, check the box next to that adult member’s name only.  Once all members that will share the new phone number have been selected, click **Finish**.  **Result:** This adds the phone number to the list of phone numbers on the account for the member and anyone else that gave consent to use the phone number for themselves. |

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| Editing a Phone Number |

 If multiple phone numbers are listed on the member's profile, delete any duplicate or additional phone numbers that are no longer applicable to the member. Refer to [Deleting a Phone Number](#_Adding_a_Plan) section below.

Perform the following steps if a member requests that a phone number be edited on their account:

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| **Step** | **Action** | |
| **1** | Verify that the caller has authorization to edit the member’s phone number.   * As needed, advise the caller you can only update their individual phone number and those for any minor children.   **Authorization Notes:**   * Review Member Alerts to determine if there are phone number–related restrictions on the account. If restrictions exist, take note of which members are affected and adhere to the restrictions.   Authorized party callers (benefits offices, prescribers, individuals calling on behalf of the member, etc.) are **not** authorized to make phone number changes **when placing an order**. Only members (and designated individuals such as POAs) can make these requests.  Confirmation is required from the other adult members on the account before their phone number can be added or changed. If needed, ask if the other adult members are available to make changes during the call.   * If the other adult member comes on the line to approve the caller to update contact information, you must have the member re-authenticate before making any changes. * If the other adult member is unavailable, advise the caller that they can call back or update their phone number individually on the Member Web Portal. | |
| **2** | From the Member Snapshot Landing Page, navigate to the **Contact Information tab**, **Phone Number** section, and click **View All Phone Numbers**.    **Result:** The Phone Numberspopup displays. | |
| **3** | Review the phone numbers on file for the member and locate the phone number that needs to be edited, and then click the **Row Level Action** drop-down arrow to select **Edit**. | |
| **4** | In the **Edit Phone Number** popup, edit information the member wants to change, and then click **Save**.  **The system displays an error if the phone number is not in the correct format or if it includes an invalid Area Code.**    **Result:**   * A message displays: “Phone number was successfully added.” * A popup displays the following message: “Reminder: Update member’s messaging preferences when updating phone number.” Click **Close** to exit the popup. Refer to [Compass - Obtaining an Email Address and Managing Messaging Platform (MP) Notifications (054195)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=16d97031-aab3-4e30-b5d8-69ba322678d6) to update messaging preferences.   **Notes:**   * When editing the phone number, repeat the phone number back to the member to ensure it is correct. * The Contact Preference checkboxes indicate the following:   + **Daytime:** Receives calls in the AM   + **Nighttime:** Receives calls in the PM   + **Text Messages:** Receives text messages (only select for mobile phone numbers) | |
| **5** | Remind the member and adult dependent to also change their phone number with their Benefit’s office. Otherwise, it is possible for their phone number to default back to the number they have on file with the Benefit’s office. | |
| **6** | Complete the **Apply Changes to Other Members** popup as needed. This popup only displays when a phone number is edited, and other adult member(s) are listed on the account.  **Note:** Minor children will share a phone number with the primary cardholder. | |
| **If the caller wants to…** | **Then…** |
| Edit the phone number only for themselves | Click **Cancel**. |
| Apply changes to other adult members (anyone 18 years and older) | Read the disclaimer at the bottom of the popup to the caller: “We cannot change phone numbers for other adults without receiving their verbal consent. If they are unavailable, they can call back or update their phone number on the Member Web Portal.”  If the other adult member comes on the line to approve the caller to update contact information, you must have the member re-authenticate before making any changes.  Only after you have received verbal consent or confirmed that the caller has authorization (legal documentation like a POA must be on file) to edit the phone number for an adult member, check the box next to that adult member’s name only.  Once all members that share the edited phone number have been selected, click **Finish**.  **Result:** This will add the phone number to the list of phone numbers on the account for the member and anyone else that gave consent to use the phone number for themselves. |

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| Deleting a Phone Number |

 If multiple phone numbers are listed on the member's profile, delete any duplicate or additional phone numbers that are no longer applicable to the member.

Perform the following steps if a member requests that a phone number be deleted from their account:

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| **Step** | **Action** |
| **1** | Verify that the caller has authorization to delete the member’s phone number.   * As needed, advise the caller you can only update their individual phone number and those for minor children.   **Authorization Notes:**   * Review Member Alerts to determine if there are phone number–related restrictions on the account. If restrictions exist, take note of which members are affected and adhere to the restrictions.   Authorized party callers (benefits offices, prescribers, individuals calling on behalf of the member, etc.) are **not** authorized to make phone number changes **without placing an order**. Only members (and designated individuals such as POAs) can make these requests.  Confirmation is required from the other adult members on the account before their phone number can be added or changed. If needed, ask if the other adult members are available to make changes during the call.   * + If the other adult member comes on the line to approve the caller to update contact information, you must have the member re-authenticate before making any changes.   + If the other adult member is unavailable, advise the caller that they can call back or update their phone number individually on the Member Web Portal. |
| **2** | From the Member Snapshot Landing Page, navigate to the **Contact Information** tab, **Phone Number** section, and click **View All**.    **Result:** The Phone Numbers popup displays. |
| **3** | Review the phone numbers on file for the member and locate the phone number that needs to be deleted; then click the **Row Level Action** drop-down arrow to select **Delete**. |
| **4** | In the **Delete Phone Number** popup, review and verify the phone number the caller wants to delete from their member account, and then click **Delete**.    **Result:** A message displays: “phone number was successfully deleted, and messaging preferences were changed.” |
| **5** | Remind the member and adult dependent to also change their phone number with their Benefit’s office. Otherwise, it is possible for their phone number to default back to the number they have on file with the Benefit’s office. |

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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)

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