# **Compass - Viewing, Adding, and Editing Alerts**

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**Description:** Outlines how to view, add, and edit Alerts located on the Member Snapshot Landing Page.

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| General Information |

Alerts that are input at the Member, Client, or Mail level on a member’s profile will display in the **Alerts** panel in the top-left corner of both the Member Snapshot screen and the Claims Landing Page of Compass.

**** Do not enter Alerts that are not specified. There are no options for free-form notes to help prevent the unnecessary use of Alerts.

****Only enter Alerts under the appropriate Category and Sub-Category. If you cannot find the Alert Type you need, reach out to your team for assistance. If the Alert Type is missing, provide the Work Instruction and details in [Compass - Submitting Feedback (047004)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=2f9c9c9a-47ce-4600-afae-1c16ef9b7808).

Agents can view the different types of alerts by clicking the **Member**, **Client**, and **Mail** tabs in the **Alerts** panel. The three types of alerts are defined as follows:

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| **Type** | **Description** |
| **Member Alert** | Comments entered by the Customer Care Representative (CCR) that **do not** affect the processing of an order (**Example:** Member’s preferred name/nickname).  Member Alerts have the highest priority, and Care reps MUST view all active Member Alerts whenever they access a member’s account. |
| **Client Alert** | Comments entered by the Client that supplement information in the CIF. Can be related to specific plan members. |
| **Mail Alert (formerly Stop See)** | Comments entered by the CCR at the request of the member that must be reviewed before the processing of any medication or order.  **Note:** The Alert’s Expiration Date is auto populated based on the Alert Category and Sub-Category that the CCR selects, but can be edited.  **Examples:**   * The member indicates they do not want a New Rx to be filled until a certain date. * The member wants a preferred manufacturer for a medication. |
| **Exception Alert** | Comments entered by the Senior Team.  **Example:** Privacy: Documentation received, evaluated, and approved for a Power of Attorney |
| **Member request for a permanent Member Alert or Mail Alert** | CCRs can only enter alerts for the default dates. Permanent alerts must be placed by the Senior Team or a Supervisor.This is a procedural warm transfer and member must be on the call to complete this request. |

**** Member Alerts can contain PHI (drug name, Rx Number, etcetera) when necessary to communicate the member’s need.

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| Viewing Member, Client, Mail, and Exception Alerts |

To view/add Order Alerts, refer to [Compass - Mail Order History / Order Status (056369)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0ad0ab77-cb2e-4521-8f97-659304a0c8f8)

To view Alerts during a call, complete the following steps:

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| **Step** | **Action** |
| **1** | Navigate to the **Alerts** panelin the top-left corner of either the Member Snapshot Landing Page or the Claims Landing Page.    Only active alerts will display in the **Alerts** panel. (Alerts transferring over from PeopleSafe without an expiration date do not display.)  Indicates **Member** or **Mail Alert** expiration date needs confirmed. |
| **2** | Review the alerts in the **Alerts** panel. Agents can view the different types of alerts by clicking the appropriate tabs.    **Notes:**   * The Alerts panel will display the 10 most recently added alerts sorted by creation date (showing the most recent created at the top). You can use the scroll bar to view older alerts. * If no Alerts display, the following message will display: “No active alerts. Select **View All** for inactive alerts.” |
| **3** | From any tab on the **Alerts** panel, click the **View All** hyperlink.    **Result:** The Alerts screen displays. |
| **4** | Review the **Alert Details** as needed. The Alerts screen has four tabs: Member, Client, Mail, and Exception. ( Indicates the Member or Mail Alert expiration date needs confirmed.)  **Notes:**   * Hovering over the **Member Name** hyperlinkwill show creation details. * Indicates the Member or Mail Alert expiration date needs to be confirmed.      * Displaying the 20 most recent Mail & Member Alerts, yearly notification can only support these records. There are more alerts, refine search criteria. * To refine search criteria, enter **Start Date** and **End Date**, click **Search**. |

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| Adding Member and Mail Alerts |

Alerts may only be requested by members that are calling for themselves, or callers who have specific permissions to act on the member’s behalf. Example: Caller with Power of Attorney (POA).

Member Alerts can contain PHI (drug name, Rx Number, etcetera) when necessary to communicate the member’s need.

**Note:** Use a professional tone when writing notes/comments in Compass,do **not** include:

* Profane language
* Personal opinions
* Judgments about the caller
* Information that does not relate to the issue at hand

To add Member or Mail Alerts, complete the following steps:

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| **Step** | **Action** | |
| **1** | Navigate to the **Alerts** panel in the top-left corner of either the Member Snapshot screen or the Claims Landing Page.    **Note:** Before adding new Alerts, review current alerts to make sure the alert is not already added. Refer to the [Viewing Alerts](#_Viewing_Member_Alerts) section above. | |
| **2** | From any tab on the **Alerts** panel, click the **View All** hyperlink.    **Result:** The Alerts screen displays. | |
| **3** | Select the **Member** or **Mail** tab, depending on the type of Alert that needs to be added.  **Note:** Care agents cannot add Client Alerts. | |
| **4** | From either the Member or Mail Alerts screen, click the **Add** button.    **Result:** The appropriate Add Alert modal displays: | |
|  | |
| **5** | Complete the required fields depending on the type of Alert you are adding. (The **Save** button will be disabled until all required fields are completed.)  **Notes:**   * Fields are dynamic and will populate based on the **Category** and **Sub-Category** selected. * To exit, click **Cancel**. | |
| **If…** | **Then…** |
| Member Alert | * From the **Member** drop-down menu, select the member’s name.   + From the **Category** drop-down menu, select one of the following: * Member Requirements * Program Participation * Privacy Information * Address   **Result:** Based on the category selected, the relevant Alert sub-categories populates.   * + From the **Sub Category** drop-down menu, make the appropriate selection.      * + Complete all required fields that generate once a sub-category is selected.   **Notes:**   * + - The system will auto populate the Expiration Date, which can be unique to each Category and Sub-Category selected. **Additional information is dynamic.**     - Based on the information entered in the required fields, the Alert text will be automatically generated.      * Once all required fields are completed, click **Save**. |
| Mail Alert | When you select a Mail Alert **Category**, the following message displays: “By adding this alert, none of your orders will be shipped automatically.” You must provide this disclaimer to the member.   * From the **Category** drop-down menu, select one of the following: * Dosage Form * Do not Mail Prescription Alert * Specific Manufacturer * Specific Brand/Generic or Drug * Please call member prior to shipping Mail Order. For this Category, provide the following disclaimer to the member:  By adding this alert, you will be contacted by our Mail Order team prior to shipping your orders. * Special Instructions * Address   + - If the member is deceased, refer to [Compass - Mail Order Calls Regarding Deceased Members (064870)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=84208228-6cf3-46fd-ae5a-14624e9f04c0).   **Result:** Based on the category selected, the relevant Alert sub-categories will populate.   * From the **Sub Category** drop-down menu, make the appropriate selection.      * Complete all required fields that generate once a sub-category is selected. Then click **Save**.   **Note:** The system will auto populate the Expiration Date, which can be unique to each Category and Sub-Category selected. **Additional information is dynamic**.    **Result:** The Add Alert to Other Members modal displays.  Select other family member(s) to add the Mail Alert to on the account.    We cannot add alerts for other adult members on the cardholder’s account without receiving their verbal consent. If they are unavailable to provide their permission, they can call back to add an alert to their account.  **Notes:**   * To choose All Family Members, select the top checkbox in the header column. * Confirmed consent will be **required by an adult member** for minor children. * To exit the Add Alert to Other Members modal, click **Cancel**.      * To complete adding alerts, click **Finish**.   **Note:** Based on the information entered in the required fields, the Alert text will be automatically generated.  **Result:** When the alert is added, the agent is returned to the Member or Mail Alerts screen and the following success message displays: “Alert was successfully added.” |

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| Editing Member Alerts (Expiration Date Only) |

To update the Expiration Date of an existing Alert to a current/future date, complete the following steps:

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| **Step** | **Action** |
| **1** | From the **Alerts** panel of either the Member Snapshot screen or the Claims Landing Page, click **View All**. |
| **2** | Review the Alerts screen to verify which Alert requires an edit. Once located, click the **Row Level Action** drop-down arrow and select **Edit Date**.  **Note:** The **Row Level Action** drop-down menu options display only for active (not expired) alerts.    **Result:** The Edit Date modal will display. |
| **3** | Enter the new date in the **Expiration Date** field and then click **Save**.  **Notes**:   * You can only update the expiration date to a **current** or **future date**. * To exit the Edit Date modal, click **Cancel**.     **Result:** You return to the Alerts screen.   * If the Save is successful, the following message displays: “Alert was successfully updated.”      * If the Save is unsuccessful, the following message displays: “System Error - Try again or contact your System Administrator.” |

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| Confirming Member Alerts |

The system shall notify the agent when an alert is still active, with an expiration date, but was last updated more than **365 days ago** compared to the current date.



To confirm an alert, complete the following steps:

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| **Step** | **Action** |
| **1** | From the **Alerts** panel of either the Member Snapshot screen or the Claims Landing Page, click **View All**. |
| **2** | Review the Alerts screen to verify which Alert needs confirmed. Once located, click the **Row Level Action** drop-down arrow and select **Confirm**.  **Result:** Confirm this alert pop up displays. |
| **3** | Ask the member if the alert is still needed, select **Yes** or **No,** then click **Save**.  **Notes:**   * If agent clicks "Yes" and "Save", the system will update the last updated date on the confirmed alert. * If agent clicks "No,” (Expire alert today) and “Save”, current date display, and the system will update the expiration date on the confirmed alert.      * When alert is confirmed, message will display "**Alert was successfully confirmed**." or if "No" then message will display "**Alert was successfully expired**". * To exit, click **Cancel**. (Cancel button is only enabled when there is a system error to take the agent back to the list screen.) |

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| Requesting Expiration of a Mail/Member Alert in Compass |

If a Compass Alert needs to be expired, CCRs can email the request directly to Pittsburgh ODS.

Expiration may only be requested by members that are calling for themselves, or callers who have specific permissions to act on the member’s behalf. Example: Caller with Power of Attorney (POA).

Complete the following steps:

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| **Step** | **Action** |
| **1** | Compose the email as follows:   * **To:** Pittsburgh\_ODS  ([Pittsburgh.ODS@CVSHealth.com](mailto:Pittsburgh.ODS@CVSHealth.com)) * **Subject:** SECUREMAIL – EXPIRE STOP SEE/ALERT – This email may contain PHI or other sensitive information.   **Note:** For Urgent or FEP requests, indicate “Urgent Request” or “FEP Request” along with “Request to Expire Stop See or High Priority Comment” in the Subject Line.   * Add “Sensitivity Stamp / Confidential” in Outlook      * **Body of Email:**   + Member’s Name   + Member’s ID Number   + Member’s Client Code   + Paste the comment that needs to be expired/removed from the member’s account   **Example email template:**  **Note:** You can copy/paste the template and insert the appropriate information.    **Subject:** SECUREMAIL – EXPIRE STOP SEE/ALERT – This email may contain PHI or other sensitive information     |  |  | | --- | --- | | **Member ID#:** |  | | **Member Name:** |  | | **Client Code:** |  | | **Date Alert Added:** |  | | **Current Alert:** |  |     Please expire current stop see comment/Alert as of <date> per member request. |
| **2** | Send email.  **Result:** ODS Leads (Pharmacy Ops Team) process the removal of the Compass Alert/High Priority Comments.  **Note:** The account will be documented when comments were removed once the request is completed.  **Resolution:** 24 hours |

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| Related Documents |

**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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