# Compass - Split Payment (More Than One Method of Payment) for an Order

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**Description:** Steps to add multiple payments for members using more than one credit card or e-check when placing a new order, a refill order, or managing an order already in process.

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| **Reminders** |



****For all situations where a member is at risk of being low or out of medication due to shipping, refer to [Compass – Member Low or Out of Medication (063003)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=91f73b9d-e568-48dd-9ab4-88cb2654d4c9) or [Compass – Search for CVS Retail Inventory (Drug Shortage / Out of Stock) and View Claim Details (RxConnect) (RxConnect) (066768)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c10d717e-f397-4f10-8fb6-3731cd856f5c).

 Members may still receive calls for high copay issues after releasing orders for split payment due to contractual obligations with clients which require us to make outbound calls when copays reach a certain amount. Refer to [Compass - High Dollar Copay Orders and Cardholder Limits (073658)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=37de659a-8d97-4716-804c-f34bfa38823f) as needed.

 The following procedures are applicable to **FSA** (Flexible Spending Account) cards as well. Ensure that '**FSA**' is clearly indicated as the payment method in the task, notes, or comments sections when applicable.

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| **New or Refill Order and Payment Needs to be Split (No Order in Process)** |

Perform the following steps when a member wants to place a new or refill order and has requested to split the payment between multiple credit cards or e-checks.

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| **Step** | **Action** |
| **1** | Place the Refill as normal. Refer to [Compass - Mail Rx Refill/Renewal (Order Placement) (054262)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad3a7263-725b-4d5d-a2ec-440f1f30d79c). |
| **2** | From the Verify screen during a Refill Prescription (**Rx**), click the **Split Payment** toggle button to indicate **Yes**.  No more than 2 different payment methods can be used to pay for an order via automation during the Refill process.  **Note:** If three or more different payment methods are needed for a new or refill order, refer to the [Scenario Guide](#_Scenario_Guide) section within this document for further instructions.    **Result:** The single **Payment Method** field will be replaced with **4 new fields:**   * Payment Method 1 * Payment Method 1 Amount * Payment Method 2 * Payment Method 2 Amount |
| **3** | From the **Payment Method 1** dropdown menu, select the first payment method the caller would like to use, then enter the dollar (**$**) amount the caller wants to apply to it in the **Payment Method 1 Amount** field.  **Result:** The remaining Total Cost $ amount will automatically populate in the **Payment Method 2 Amount** field, and the **Next** button will be replaced by a **Submit Support Task** button. |
| **4** | From the **Payment Method 2** drop-down menu, select the payment method the caller would like to use for the remaining Total Cost $ amount already displayed in **Payment Method 2 Amount** field.  **Notes:**   * Payment Method 1 and 2 cannot be the same.   + If the caller needs to add or update the payment methods available on their account, click the **Add/Update** button to add a new method of payment. Refer to [Compass - Add, Edit, and Delete Mail Order Payment Methods (Credit Card & eCheck) (056289)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a1a67eb-a7b1-4ae5-bcfe-e986bbe4aa3d). **Note:** eCheck stands for electronic check. * Once the payment method is updated/added, return to Order Details, and click **Refresh for Updates**. * Fill and Bill can be used as a Split Payment option (if it does not exceed the client Fill and Bill threshold).   **Result:** TheSubmit Support Taskbutton illuminates after all Payment Method fields are completed. |
| **5** | Once both payment methods and payment amounts are confirmed, click the **Submit Support Task** button.  **Result:** The Split Payment Support Task confirmation popup displays. |
| **6** | Click **Yes** to proceed with the Support Task.  **Note:** If you do not want to proceed with the Support Task, click **No**. You will be returned to the Refill Rx - Verify screen.  **Result:** The Refill Rx - Split Payment Support Task Submitted screen displays.    **Note:** The Turnaround Time (TAT) verbiage can vary based on if Rx(s) have refills or a New Rx Request is required. Refer to [Compass – Order Shipping Turn Around Time (TAT) (062824)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=31ee69db-e3d5-4717-b336-23ca51f1191e) as needed. |

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| **Split Payment for Order that is in Process or Payment Exception** |



Refer to the [HIPAA (Health Insurance Portability and Accountability Act) Grid - CVS (028920)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce) as needed when making any changes to an order and you are not speaking to the member directly.

 When applicable, reference [Compass - Credit Card Pre-Authorization and Talk Tracks (074894)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=42e9aada-ac08-4a9f-a001-642caf99ea03) and [Compass - Payment - Duplicate Credit Card Charges & Card Authorizations (075764)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0ae7af8f-732e-4a1b-be6e-5036aac5feaa).

Perform these steps when a member wants to split a payment that is already in the system or when the order is in a payment exception status.

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| **Step** | **Action** | |
| **1** | Navigate to the Claims Landing Page,then click the**Mail Order History**tab. Locate and confirm the Order Status. Refer to [Compass - Mail Order History / Order Status (056369)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0ad0ab77-cb2e-4521-8f97-659304a0c8f8) as needed. | |
| **2** | Verify all order details are correct.  **Reminders:** When checking the status of an order (not an all-inclusive list):   * Verify the order details such as the name of the medication, strength, and dosage with member. * Verify shipping address, call back number, and messaging alert preferences with the member. * For information related to the time it will take to process a prescription, refer to [Compass – Order Shipping Turn Around Time (TAT) (062824)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=31ee69db-e3d5-4717-b336-23ca51f1191e). | |
| **3** | Verify all applicable payment methods are listed and up to date on member’s account, before proceeding with any Split Payment requests. Refer to [Compass - Add, Edit, and Delete Mail Order Payment Methods (Credit Card & eCheck) (056289)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a1a67eb-a7b1-4ae5-bcfe-e986bbe4aa3d) as needed.  If the member is disputing a payment, do not delete the payment method until the refund has been processed.   * Check the **Member’s Recent Support Task** panel to see if a Payment Dispute task has been initiated and review its status. To view task history, refer to [Compass – View Support Task History (050044)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1674c564-fc41-42ad-a7c2-f3b610716cba).   Refer to the below scenarios as needed. | |
| **If…** | **Then…** |
| Order has a **Partial Authorization** | Refer to the “**Payment Divert Scenario Guide**” section of [Compass - Manage Diverts / Conflicts (Release Order) (056291)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d4ef5860-ef38-4ae9-afd8-a4cb0d1f12e6).  **Note:** Do not remove or update the original payment method on a partially authorized order. This action will void the initial payment method/charge and can cause delays in resolving the partial authorization. |
| Order has a **voided** original payment method/charge | 1. Create an email to [SATDebitsandCredits@CVShealth.com](mailto:SATDebitsandCredits@CVShealth.com). 2. Include “**SECUREMAIL – SPLIT PAYMENT this email may contain PHI or other sensitive information**” in the Subject line. 3. Copy and paste the Split Payment table below into an email body, then complete all fields.    Do not list full credit card or account numbers.   |  | | --- | | **Split Payment** |      |  |  | | --- | --- | | **Member ID#** |  | | **Member Name** |  | | **Order Number** |  | | **First Form of Payment and last 4 Digits**  (VISA, MasterCard, American Express, Discover Card, E-Check, or Fill and Bill if allowed by client) |  | | **First Amount Applied** |  | | **Second Amount Applied** |  | | **Second Form of Payment and last 4 Digits** (VISA, MasterCard, American Express, Discover Card, E-Check, or Fill and Bill if allowed by client) |  | | **Details of Matter** | Original method of payment was **voided** from the order, please charge the original amount ($XX.XX) to VISA/MSTR/AMEX ending xxxx. |   e. Send the email.  f. **Turnaround Time** (TAT): Emails sent to the SAT Debits & Credits mailbox will be worked within 1 business day.  If no email access, contact the Senior Team. Refer to [Compass - When to Transfer Calls to the Senior Team (057524)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7653e7c2-1a97-42a0-8a81-6267c72e1ca9). **MED D or EGWP**: [Compass MED D - When to Transfer Calls to the Senior Team (062944)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0990aac5-274f-424d-9400-546d74b3fed7). |
| Order is **dispensing** | Send a **Stop Tote** Automated Emailin Compass. Refer to [Compass - Stop Tote Requests (057999)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a4299650-04b0-46ee-b152-84f81ee81658).   * When prompted, in the “**Details of Matter**” text box, fill out information and include in the comments (copy and paste):   Member would like to pay for order via **split payment**:  Payment Method #1: Last 4 digits of credit/debit card or e-check.  **#1** - Payment Amount.    Payment Method #2: Last 4 digits of credit/debit card or e-check.  **#2** - Payment Amount.   Do not list full credit card or account numbers.     * Stop Tote requests **do not** happen in real time. Refer to [Compass - Stop Tote Requests (057999)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a4299650-04b0-46ee-b152-84f81ee81658) as needed.   Advise the member:   The order has already been fulfilled by our pharmacy. There is **no guarantee** that an order can be modified once the order is fulfilled. I will send a Stop Tote Request to try to update your payment method. If the Stop Tote is unsuccessful, you will be contacted by Participant Services for next steps.  Ensure that the member’s address, phone number, and email are up to date for [Messaging Platform (MP) Notifications (054195)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=16d97031-aab3-4e30-b5d8-69ba322678d6). |
| Order has **shipped** | Submit a **Payment Dispute Task.** Select “**Member requesting charge to be placed on different payment method**” from the Reason for Payment Disputedropdown. Refer to [Compass - Mail Order Payment History/Payment Dispute Support Task (Mail Order Claims Only) (058044)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=54a5f0cf-a7cb-4533-9a46-49a39106d764).  Fill out information and include in the Support Task notes (copy and paste):  Member would like to pay for shipped order via **split payment**:  Payment Method #1: Last 4 digits of credit/debit card or e-check.  **#1** - Payment Amount.    Payment Method #2: Last 4 digits of credit/debit card or e-check.  **#2** - Payment Amount.     Do not list full credit card or account numbers.  **Notes:**   * Refer to [Compass - Create a Support Task (050031)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6) or [Compass - Support Task Types and Uses List (058147)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6753488f-3996-45d9-88ba-257575369a98) as needed. * Refer to [Compass - Support Task Types and Uses with Turnaround Time (TAT) (056365)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4ac2747d-17b4-4986-8c4e-3bdaca477cf1). |
| **4** | **Turnaround Time** (TAT): The resolution time will vary based on the issue.  Business days do **not** include weekends and holidays. | |

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| **Scenario Guide** |

**Refer to the table below:**

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| **Scenario** | **Action** |
| **Three or more** different method of payments need to be used for the payment of an order not yet in process. | Submit an Offline Refill Request using the **Create Support Task** button.    **Include in task notes (copy and paste):**     * Payment Method #1: <Last 4 digits of credit/debit card or e-check>   **#1** - <Payment Amount>   * Payment Method #2: <Last 4 digits of credit/debit card or e-check>   **#2** - <Payment Amount>   * Payment Method #3 <Last 4 digits of credit/debit card or e-check>   **#3** - <Payment Amount>  **Do not** list full credit card or account numbers. |

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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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