# Compass - Mail Rx Refill/Renewal (Order Placement)

[Order Placement Requests](#_Toc206668617)

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**Description:** Process used when a plan member contacts Customer Care to refill a Mail Order prescription or renew a previous Mail Order prescription.

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| Order Placement Requests |

For more information on specific Order Placement Requests, refer to the table below:

**Note:** 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) for additional guidance on information that may be shared.

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| **If…** | **Then…** |
| Member is placing order for themself | Refer to the [Refill Process](#_Refill_Process) section. |
| Member is placing order for themself and dependent(s) | * Authenticate the caller placing the order for the additional members. * Follow [Refill Process](#_Refill_Process) for each member. |
| Placing order for multiple members when an account has an Exclusive method of payment | * Authenticate the caller placing the order for the additional members. * Follow [Refill Process](#_Refill_Process) for each member.   A Separate order must be placed for the member with the Exclusive method of payment. |
| Custodial parent placing order for a minor on a non-custodial parent account | * Authenticate the caller placing the order for the minor. * Follow the [Refill Process](#_Refill_Process). |

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| Refill Process |

Ensure the plan is active. We cannot process a refill order on an inactive plan.



* The following message will display on **inactive plans:** “Expired eligibility period. No benefits available.”
* The following message will display on **future dated plans:** “Future eligibility period. No benefits available.”

Complete the steps below:

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| **Step** | **Action** | | |
| **1** | From the Claims Landing Page, click the **Mail Rx** tab.  **Result:** The **Actionable Rx** tab of the Mail Rx screen displays.    **Notes:**   * The **Actionable Rx** tab displays by default. Click the **Rx History** tab to view other prescriptions if needed.   + If member wishes to refill/renew prescriptions on the **Rx History** tab, refer to the [Scenario guide](#_Scenario_Guide) for Rx Expired or No Refills Remain. * Refer to the [Rx History](#_Rx_History_1) section below for additional information. * The **Refill/Renewal** button will be disabled if the agent is in a **Research Case**. * Refill requests **cannot** be made for Specialty medications. Warm transfer the member to Specialty Customer Care at **1-800-237-2767** or **1-866-387-2573**. * Hover over the provider’s name in the **Provider column** to view the provider’s address, phone number, and fax number associated with that prescription. * The formulary change letter will still go out to the member 60 days in advance of the formulary change. * A message will display during the refill flow.   + The message will display prior to and after the change.   + If the message displays, the CCR will not need to do anything.   + Messaging only displays if the medications is in the order.     - Only displays if the Rx is changing in the formulary. CCR can educate the member that their medications may be changing.     - If the prescriber makes a change to the medication, the member is notified their prescription has changed. | | |
| **2** | Determine if the caller is placing a refill for themselves or multiple family members on the account.   * If placing a refill for only themselves, proceed to the **next step**. * If placing a refill for multiple family members, select **Family** from **View by Member or Family** dropdown. Select all appropriate prescriptions requested to be refilled. Authenticate all members the caller is requesting a refill for. Refer to [Universal Care - Caller Authentication (004568)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bcb8da72-5501-4631-b9fd-fe675bc4a1fd) and[HIPAA (Health Insurance Portability and Accountability Act) Grid - CVS (028920)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce) for additional Authentication information. | | |
| **3** | Ask the caller for the Rx #(s) or Rx name(s) and the member(s) that need refills, locate them on the **Actionable Rx** tab, and then click the appropriate checkbox(es).  **DO NOT proactively offer Rx information.** ONLY IF you are speaking to an authenticated member about their own prescriptions, you may proactively provide them with the Rx numbers or names of medications on file. If you are speaking with an authenticated caller but they are calling on someone else’s behalf, then they must provide either the Rx # or Rx name.      **Notes:**   * **If the Next Fill Date is within 14 days** **of placing the order,** the order will go into Future Fill and begin processing on the Next Fill Date. * **If the Next Fill Date is beyond 14 days of today’s date,** **DO NOT** place the order. Once the order reached processing it would be placed on an Indefinite Hold and would not be filled. * For prescriptions that are showing on the **Mail Rx** tab, and that have not been previously filled, the **Last Fill Date** will be blank. * The **Next Fill Date** column provides the next available fill date for the prescription. If speaking to the authenticated member, you can proactively inform them of their own Rx(s) due for refill.   + Rxs with a next fill date that is today’s date or prior will show “**Due**.”   + Rxs with a next fill date beyond today’s date will show the **Next Fill Date**. * If the Rx is expired or out of refills, the standard turnaround time for the order may be longer because we will be reaching out to the provider for a new prescription. | | |
| **If…** | **Then…** | |
| The Rx # does not show on the table | Utilize **Search by Rx #**.   * Type in the **Rx #**, once an entry is made, click **Search**.   **Note:** When performing a search, the Date Range will default to 2 years.   * If Date Range filter is changed, once selection is made, click **Apply**.   + If Rx is Expired or No Refills remain, refer to the [Scenario Guide](#SearchbyRxScenarioGuide).   + If the Rx(s) are not found after the search, the following message will display: “No Rx(s) found that match your search criteria.” Start a [New Rx Request (054208)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a7684ce9-c2bc-4cbc-ab37-c1ffb7789706). | |
| The Rx(s) is from the Prior PBM Prescription Processor | * Agent can select Rx(s) from the **Prior PBM Prescription** section. For assistance refer to the [Scenario Guide](#_Scenario_Guide). * Eligible prescriptions from the expired plan will display on the Prior PBM Prescription table. | |
| **4** | Once Rx(s) is selected, click the **Add to Selected Rx(s)** button.  **Result:** The **Add to Selected Rx(s)** drop-down section will expand, displaying selected medications.  **Notes:**   * The **Add to Selected Rx(s)** button will be disabled until Rx(s) is selected. * If no Rx(s) is selected, the following message will display: “No Rx(s) selected. To add an Rx, use checkboxes above then click Add to Selected Rx(s).” | | |
| **5** | Review and confirm the selections displayed in the **Add to Selected Rx(s)** section:   * Name * Dosage Form (hover over the drug name/strength) * Strength * Available Fills (refills left; after today’s fill one less) * Quantity * Days’ Supply   **Notes:**   * If a refill is attempted on a C2 or a Specialty Drug, a pop up will display and the agent will not be able to proceed with a refill for this medication. * If the member requires a change in the provider and/or drug name/strength, submit a New Rx Request through Customer Care. If the member wants you to submit a New Rx Request, after placing the refill order proceed to [Compass - Obtaining a New Prescription (RX) for the Member (New RX Request) (054208)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a7684ce9-c2bc-4cbc-ab37-c1ffb7789706). * To remove a specific Rx from the list, select **Remove** from the Row Level Action drop-down menu. To remove all drugs from the list, click **Remove All**. * Proceed with the Refill/Renewal even if this refill is the Last Fill available or if the Rx will expire before the member’s next refill. Advise the caller of the following options to obtain a new prescription:   + - Request a provider to call or fax a new prescription into Caremark.     - Request Customer Care to contact the provider.     - Request a new prescription from the provider and mail it in. Refer to [Compass - New Rx Request Scenario Guide (Popups, Warnings, and Written Prescription) (054354)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=8bf9e4c9-2459-48b1-b0e1-6079bf9e222d).     - Check Client Program Offering for the Auto Refill Program. | | |
| **6** | Click the **Refill/Renewal** button.    **Notes:**   * The system prompts the agent with the following message for **non C2 (C3-C5)** Controlled Substance medications:   “Our team will review your prescription to ensure that it is filled at an appropriate time. If we need to adjust your fill date, we will notify you.”   * If a Not Available/Not in Stock at Mail pop up displays, refer to [Scenario Guide](#_Scenario_Guide) below. * If a Refill/Renewal Notifications popup displays Compass indicates why the Rx is Ineligible for refill and provide the next best action. Proceed accordingly: * If there is only one (1) Rx (prescription) being refilled, click **Close** and the Rx is removed. * If multiple prescriptions are being filled, click **Continue** and the Ineligible Rx will be removed, and the refill will proceed as normal for all other prescriptions. * Click **Cancel** to return the **Mail Rx** screen.      * The system uses the selected drugs in the **Selected Rx(s)** table to populate the corresponding screens when click the following buttons at the bottom of the Selected Rx(s) table:   + **Test Claims:** Refer to [Compass - Test Claims (050041)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=60c20ea0-1d07-46e3-809a-b54734b80fbe).   + **Refill/Renewal**   + **MChoice Transfer:** Refer to [Compass - Maintenance Choice (MChoice) Rx Transfer (056032)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=cc2503bf-62dc-4db1-ad98-abfe4e9e98d4).   + **Early Refill:** Refer to [Compass - Plan Benefit Override (PBO) and Early Refill at Mail Order (061702)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f90d2d18-98d1-4ba4-b8c1-9138922c065d).   **Result:** The Refill Rx - Supply on Hand screen displays.  If you need to exit the Order Placement/Refill Rx process at any time, click the **X** on the **Refill Rx** tab: | | |
| **7** | Confirm that the member has more than five (5) days’ supply of each medication on hand. | | |
| **If the member…** | | **Then…** |
| Has 5+ days’ supply medication(s) on hand | | Click **Select All**, then **Next** and proceed to the **next step**.  **Result:** After clicking **Next**, the Refill Rx - Auto-Refill/Auto-Renewal Enrollment screen displays. |
| Does not have more than 5 days’ supply of medication(s) on hand | | * Only select the checkboxes that correspond to the medications that the member has more than 5 days’ supply on hand, then click **Next**.   **Do NOT** select checkboxes for medication(s) for which the member has 5-day supply or less.  **Result:** A dialog box displays the different options the member has to obtain their medication, including upgraded shipping. Additional information displayed is based on the members’ plan offerings.     * Refer to [Compass - Member Low or Out of Medication (063003)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=91f73b9d-e568-48dd-9ab4-88cb2654d4c9). * Educate the member based on their options and then proceed depending on how the member wants to proceed. Refer to [Compass - Bridge Supply (056367)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5ecd7b05-8aed-4dbd-b4ef-8cb4912a543b) if the member opts for Bridge Supply option.   + If the member understands their options and wants to continue submitting the Refill Request, click **Continue** and proceed to the next step.   + If the member does not want to continue submitting a Refill Request for one or more medications(s):     - Click **Cancel** to return to the Refill Rx - Supply on Hand screen.     - Remove medication(s) by clicking the Row Level Action drop-down arrow and selecting **Remove**.     - Click **Next** and proceed to the next step.     **Result:** After clicking **Next**, the Refill Rx – Auto-Refill/Auto-Renewal Enrollment screen displays.  **Note:** If the member has the option, they can either have their local Retail pharmacy call and transfer the Rx from Mail Order or have their provider call in a new Rx to their local Retail pharmacy. |
| **8** | Confirm the medications the member would like enrolled into Auto-Refill/Renewal by selecting the checkbox next to the medication(s) they want to enroll, then click **Next**.    **Notes:**   * Review the()icon for an important message regarding **Auto-Refill/Auto Renewal Enrollment**. * The Member Settings section displays if the caller enrolls in ARP (Auto Refill Program) and/or has a previous Rx enrolled in ARP on this screen. If member has no default payment method on file, a message appears: “Default payment method recommended.” If the caller does not want to add a default payment method, once **Next** is selected the following message will appear: “A default method of payment is not required to enroll medication in Auto-Refill/Auto-Renewal Program. However, if payment is required for future orders, the order may be held until payment is obtained.” * If updates are needed for **Shipping Address**, **Default Payment Method**, or **Messaging Preferences,** click **Update**.Once applicable update is made and you have returned to the **Refill Rx - Auto-Refill/Auto Renewal Enrollment** screen displays, updated information will display in the related section. * The system will disable the **Auto-Refill/Renewal** checkbox if the system returns any prescription as being ineligible for the Auto Refill Program. * For assistance or questions regarding ARP, refer to [Compass - Auto Refill Program (ARP) (056033)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f843bc3f-55cc-4223-b2fc-03aff60cdf4c). * The state of California (CA) requires all pharmacies to maintain annual member consent for medications enrolled into automatic refill/renewal programs. Members will receive a communication informing them that their Rx has been disenrolled from ARP and Rx-level comments in PeopleSafe/Compass will display: “Rx disenrolled due to state regulations. Member must re-enroll to continue receiving automatic refills.“   + Refer to [Automatic Refill Program: California Regulatory Changes to Medication Exclusions Job Aid (070485)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4346e7df-7d22-4e8f-8229-8f9421cadb34) for additional information as needed. * Click **Cancel** to exit the Refill Rx request. * Click **Previous** to return to Refill Rx - Supply on Hand screen.   **Result:** After clicking **Next**, the Refill Rx - Verify screen displays.  **Note:** The**Next**buttonwill be disabled if required information is missing in the **Member Settings**section. | | |
| **9** | From the Verify screen, review and confirm the Rx information with the caller.  **Please allow me to recap your request. Today we are filling:**   * <Member’s name> * <Medication name, strength, dosage form> * <# Available Fills> * <Quantity for day supply>   **Do I have everything correct?**   * To exit the Refill request, click **Cancel**. * If the recap is incorrect, click **Previous** and repeat the necessary steps.     **Example:**  Today we are ordering your <Atorvastatin 5mg tablet>, which has <2> refills remaining or after today will have 1 refill left. That will be quantity of <90> for a 90-day supply. Do I have everything correct?  **Notes:**   * Compass will display an indicator for cold pack drugs when included in an order. * The **Verify** screen displays the final enrollment outcome for **Auto Refill/Auto Renewal**. * Compass displays the following message when a Test Claim **cannot** be completed: “Test claims failed to run. **Try rerunning test claims**.” Refer to the [Scenario Guide](#RunningTestClaimScenarioGuide) for further information. * **MED D Only:** * The **Reason Code** column is dynamic and will appear as **Messages** for Med D Members; functionality will remain the same. * A **View** hyperlink will display within the **Messages** column when additional information is available. Refer to [Scenario Guide](#_Scenario_Guide) for assistance. * **Example:** Transition Fill is used. * If a prescription shows as **Denied** due to the following reasons, continue with the order:   + M/I (missing/ invalid) quantity, package size   + Brand drug now has generic and is rejecting for invalid DAW\*   + Prior Authorization denials\*   + Future Fill Date   + Drug Utilization Review (DUR; Reject 88 that mentions Outcome Codes or PPS Codes Required)   **Note:** \*Additional research is needed for these to verify coverage via test claims and CIF and inform the member accordingly. However, continue with placing the order.   * If a prescription shows as **Denied** for any reason other than shown above, refer to [Scenario Guide](#_Scenario_Guide) for Next Best Actions. * For placing an order for Diabetic Kits, refer to [Compass - Offline Refill (056373](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=db21add8-521c-4f56-806b-2bd60acc39ed)). | | |
| **10** | From the Verify screen, confirm the **Shipping Options**.   * If the member has indicated they are running low on their medication or indicates an urgency for the order, ask if they need upgraded shipping at an additional charge. * For upgraded shipping, select from the following options in the **Shipping Options** dropdown: * Best Method (Default) * 2nd Day (+$17) * Urgent Next Day (+$23)   + If the shipping cost needs waived, refer to [Compass - Waiving Shipping Fees or Crediting Shipping (073541)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4884979f-78c9-4dbe-9d11-2921104432cb).   **Note:** When an order contains a cold pack drug, review the()icon to display an important message regarding Shipping Options. Compass will disable the option to upgrade shipping to prevent the member from being charged for expedited shipping (as orders with cold pack drugs are automatically expedited). | | |
| **11** | Confirm the **Shipping Address** and **Phone Number**.   * If the information provided by the caller:   + Matches what is available from the applicable dropdown, make the selection and proceed to the **next step**.   + Does not match what is available from the applicable dropdown, refer to the [Scenario Guide](#_Scenario_Guide).   **Note:** Successful, Failed, or Warning messages will appear for any changes made.  **DO NOT proactively offer this information.** ONLY IF you are speaking to an authenticated member, Power of Attorney and/or Legal Representative, you mayverify this information by proactively providing the default shipping address and phone number on file.   * If you are speaking with an authenticated third-party caller, ask them to provide the shipping address and phone number for the order.     **Notes:**   * Using the **Previous** button to navigate prior to the Auto Refill/Renewal screen in the Refill process will revert shipping options, shipping address, phone number, or payment method to the member’s default selections. * If the **Previous** button was used to navigate back to previous screens in the Refill process, remember to check shipping options, shipping address, phone number, or payment method before submitting the Refill. * Using the **Cancel** button discards all changes and the following message displays: “If you cancel the refill request, you will lose any updates to addresses and Auto-Refill/Renewal enrollment. If a new refill order is placed, address verification/updates are needed again.” * Member requests to have a prescription mailed to their local pharmacy must be **denied**. Mail Order prescriptions (including controlled substances) should **never** be sent to a Retail pharmacy for pick up. * When an order is started using a **one-time** address and diverts to future fill, it will release and choose the member’s default address on file. Entering a date range will ensure that the prescription will ship to the correct address if it is put into Future Fill. * Orders for minors must be sent to either the cardholder or adult spouse’s address. | | |
| **12** | Provide the caller with the **Total Cost** and **copay disclaimer** from the Verify screen, then confirm the **Payment Method**.  **Note:** Successful, Failed, or Warning messages will appear for any changes made.   * **For Credit Cards:** Last four (4) digits and expiration date. * **For eChecks:** Financial institution and account type.   **DO NOT proactively offer payment method information.** ONLY IF you are speaking to an authenticated member, Power of Attorney and/or Legal Representative, you mayverify this information by proactively providing the default payment method information on file.   * If you are speaking with an authenticated third-party caller, and the payment method is not marked as exclusive, ask them to provide the payment method information. Refer to [HIPAA (Health Insurance Portability and Accountability Act) Grid – CVS (028920)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce).   When obtaining method of payment, you may ask:  **How would you like to pay for your order today? We accept payment with credit card and electronic check.**   * If the default payment method is correct, continue to the **next step**. * If payment method needs to be updated or one of the following scenarios applies, refer to the [Scenario Guide](#_Scenario_Guide): * The Copay is $0.00 * Member has a credit on their account. * Member has a Previous Balance and disputes the amount or wants to make a partial payment. * Member requests copay installments. * Member wants to do a split payment. * Member requests to have a bill sent AND the client allows Fill and Bill * The member prefers to make a payment after the order processes. * The member requests to remove card after placing order.       **Notes:**   * If no default payment method exists, the agent will be prompted to select a method of payment. * No cost for Third Party Adjudicated (TPA) clients. Refer to [Compass - Third Party Adjudicated (TPA)Member (Identify, Test Claims and Refills) (066771)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ca3ec756-d18c-4dfd-b0c3-f1cbcdf62f13). * In the **Cost** column of the Rx Information table, **View Financials** displays by clicking on the **dollar amount** hyperlinkof an individual medication. * If the total cost for the order is over $200 (unless otherwise stated in the CIF) the member must provide permission to be charged the high copay; otherwise, their order may be delayed in processing. Permission must be documented by adding a Mail Order Alert to the account. Refer to [Compass - Viewing, Adding, and Editing Alerts (054194)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=36c941d2-25a6-4075-993d-f12deb31be18) and [Compass - High Dollar Copay Orders and Cardholder Limits (073658)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=37de659a-8d97-4716-804c-f34bfa38823f) as needed. | | |
| **13** | After confirming all information on the Verify screen, click **Next**.   * If a pop-up message displays (see following scenarios), refer to the [Scenario Guide](#ClickingNextonRefillRxScenarioGuide):   + The Test Claim failed to run automatically.   + Member is using an existing EXCLUSIVE payment method.   + P.O. Box shipping is not recommended.   + Credit Card has Expired.   + Credit Card pre-approval is denied or partially approved.   + Shipping and/or payment method unsuccessful.   + System Error   + If the address was updated and the Availability Status Change indicator displays, refer to the [Scenario Guide](#_Scenario_Guide).   **Result:** The Refill Request - Complete screen displays. | | |
| **14** | Provide the turnaround time for when the order is expected to ship.   * **If the Rx has no refills remaining or is expired:**  We need to contact your provider for a new prescription. When we receive the prescription from your prescriber, it will process within five (5) business days and will then ship from our pharmacy the next business day (does not include weekends). You will receive confirmation of shipping via your preferred method of communication to notify you of your order status. **Please note: Processing time is in-house and does not include shipping time**. * Advise caller:  We will fax your doctor twice within the next five business days to obtain your prescription. If we do not receive a response, you will receive an automated phone call informing you of this. If you have signed up for text alerts, you will be notified with each attempt. Should there be no response, you will receive a final notification, and you will need to contact your prescriber directly. * If the Rx has **refills remaining** and is not expired:  You can expect your order for the following prescription(s) to ship from our pharmacy within two (2) business days after the order is placed (does not include weekends). Orders are shipped on the first business day available (Monday-Friday) upon processing being completed. **Please Note: Processing time is in-house and does not include shipping time.**   We should not proactively offer the member a confirmation number. ONLY if the member requests a confirmation number, provide the case number.    **Note:** If Rx was selected to be enrolled in Auto Refill/Auto Renewal, the following message will display: “Refill has been submitted.” | | |
| **15** | Ensure and verify Messaging Platform (MP) Notifications are active:   * **Determine if the member has the correct phone number on file:** Is (XXX)XXX-XXXX the best number to contact you with?   + - **If yes:** Ensure messaging preferences are enabled [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).     - **If no or the existing number is incorrect:**  What is the phone number, I should have on file for you?   Refer to [Compass - Add / Edit / Delete Phone Number (053256)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c37d4289-63b2-4732-a35c-c411cc26a29c) to add the correct phone number, then set up messaging preferences,[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) for the member.   * **Determine if the member has the correct email address on file:** I show your email address is (verify email address). Is this the correct email address to contact you at?   + - **If yes:** Ensure messaging preferences are enabled [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)     - **If no:**  What is the email address, I should have on file for you?   Refer to [Compass - Add / Edit / Delete Email Address (053409)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e01087c4-421c-4330-bcb3-81cb8cb45762) to add the correct email, then set up messaging preferences, [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) for the member.  **Notes:**   * Encourage use of MP and Portal to check the status of the order. They would receive order status updates regarding their order. * Orders shipped via USPS can be tracked online at USPS.com or by calling **1-800-ASK-USPS**. Orders shipped via UPS can be tracked online at UPS.com or by calling **1-800-PickUPS**. * Encourage the member to sign up for Email and/or Text alerts via [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). Email and text alerts are the preferred method because they include tracking numbers, whereas phone MP alerts do not. Members can obtain the tracking number online on the Member Web Portal. * Once the order ships, the member can use the tracking number to determine how long it will take for the order to arrive.   Do not provide the member with a general delivery time frame, as this will vary depending on shipping method and geographic location of the member. | | |

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| Rx History (Mail Rx Tab) |

To view Rx History, follow the steps below:

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| **Step** | **Action** |
| **1** | From the Claims Landing Page, click the **Mail Rx** tab.  **Result:** The Actionable Rx tab of the Mail Rx screen displays.    **Notes:**   * The **Actionable Rx** tab displays by default. Click the **Rx History** tab to view other prescriptions if needed; however, prescriptions on the Rx History tab cannot be refilled/renewed. * Prescription List will default to the member and will **NOT** have an option to view by Family. (Search criteria populates based on **Family Member** and **Date Range** selected prior to search). * There is an option to sort by each column: **View by Member or Family, Search by Rx#**, **Show Last** and **Date Range (2 Years max)**.   **Note:** When searching by Rx#, the date range will change to the maximum date range allowed.   * Only **one** instance of each Rx # with the latest **Fill Date Populated** is shown. * Rx’s that are marked as **Voided** are not included. |
| **2** | Click the **Rx History** tab.  **Result:** A list of previous Mail Order Prescriptions within the default 90-day window displays.    **Notes:**   * **Rx #** is a hyperlink to the **Prescription Details** page. * **Drug Name/Strength** is a hyperlink to the **Drug Details** page. * **Quantity (Qty) /Days:** Supply the Rx is written for. (Decimal values should be displayed only if needed) * **Available Fills:** Number of refills remaining. * **Last Fill Date:** The last date the Rx was filled. |

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| Scenario Guide |

Refer to the following scenarios as needed:

* [Selecting Prior PBM Prescriptions:](#_Toc208218834)
  + [Prescriptions from expired or active CVS/Caremark plans.](#_Toc208218835)
  + [Member requests to order an Rx transferred over from a Prior PBM](#_Toc208218836)
  + [Prior PBM Rx unable to be refilled](#_Toc208218837)
* [Search by Rx#:](#_Toc208218838)
  + [Rx Expired or No Refills Remain](#_Toc208218839)
* [Not Available/Not in Stock at Mail:](#_Toc208218840)
  + [Prescription Not Available at Mail](#_Toc208218841)
  + [Prescription Not in Stock at Mail](#_Toc208218842)
* [Running a Test Claim:](#_Toc208218843)
  + [Test claims failed to run. Try rerunning test claims. (Banner message displays)](#_Toc208218844)
* [MED D Only - Viewing Messages:](#_Toc208218845)
  + [Transition Fill is used (View hyperlink displays)](#_Toc208218846)
* [Denied Test Claim on Refill Rx – Verify screen:](#_Toc208218847)
  + [Test Claim **Denied**, view Rejection Code](#_Toc208218848)
* [Confirming the Shipping Address/Phone Number (Step 11):](#_Toc208218849)
  + [The address is updated on the refill verification screen and the Availability Status Change indicator displays](#_Toc208218850)
  + [The Shipping Address/Phone Number the caller states are NOT available to select from the related drop-down menu](#_Toc208218851)
  + [The member requires an Alternate Mailing Address](#_Toc208218852)
  + [The member selects expedited shipping to a P.O. Box and states they are unable to provide a physical address.](#_Toc208218853)
  + [The member indicates to NOT ask for a physical address again.](#_Toc208218854)
  + [The member is using a P.O. Box with Cold Pack](#_Toc208218855)
  + [The caller requests the Mail Pharmacy Address or Regional Order Creation Center (ROCC) Address](#_Toc208218856)
* [Confirming the Payment Method (Step 12):](#_Toc208218857)
  + [Selecting an existing payment method](#_Toc208218858)
  + [Credit Card has Expired and ONLY the expiration date needs to be updated.](#_Toc208218859)
  + [Credit Card has Expired and/or member wants to add new Payment Method](#_Toc208218860)
  + [The Copay is $0.00](#_Toc208218861)
  + [Member has a credit on their account](#_Toc208218862)
  + [Member has a Previous Balance and disputes the amount or wants to make a partial payment](#_Toc208218863)
  + [Member requests copay installments](#_Toc208218864)
  + [Member wants to do a split payment](#_Toc208218865)
  + [Member requests to have a bill sent AND the client allows Fill and Bill](#_Toc208218866)
  + [The member prefers to make a payment after the order processes](#_Toc208218867)
  + [The member requests to remove card after placing order](#_Toc208218868)
* [Clicking Next on the Refill Rx - Verify screen and a pop-up message displays (Step 13):](#_Toc208218869)
  + [The Test Claim failed to run automatically (pop up displays)](#_Toc208218870)
  + [Member is using an existing EXCLUSIVE payment method (popup displays)](#_Toc208218871)
  + [P.O. Box shipping is not recommended (dual popup displays)](#_Toc208218872)
  + [Credit Card has Expired. Please select Another Credit Card](#_Toc208218873)
  + [Credit card pre-approval is denied or partially approved](#_Toc208218874)
  + [System Error on Refill Screen](#_Toc208218875)

### Selecting Prior PBM Prescriptions:

|  |  |
| --- | --- |
| **Scenario** | **Action** |
| Prescriptions from expired or active CVS/Caremark plans. | * **Prior PBM Rxs** needing transferred from expired or active plans will show an indicator () and will not be refillable until transferred.      * Prescriptions from expired CVS/Caremark plans display under **Prior PBM Rxs** section in the **Mail Rx** tab. * When logged into an expired plan, only prescriptions that were a part of that now expired plan displays. * When logged into an active plan, the system displays all refillable prior prescriptions from expired plans for the selected member under **Prior PBM Rxs**. All valid Prescriptions filled by CVS/Caremark mail order pharmacy are viewable. * Refillable prescriptions are not discontinued and not expired. Expired and discontinued prescriptions do not display. * If the member has **Multiple** active plans, the expired plan’s refillable prescriptions will be displayed on each active plan. * If the agent logs into a plan before the plan start date, prescriptions from prior plans do not display. * Searching by Rx number displays as normal. * Selecting a prescription that does not need transferred allows the agent to proceed with the Refill/Renewal as normal. * Selecting a prescription that needs transferred, then clicking **Refill/Renewal** will display the Rx Transfer Required screen and allow agent to transfer the prescriptions to the current plan. Refer to [Compass - Transfer Existing Rx to New Account (Carrier-to-Carrier/Open Rx Transfer) (057128)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6763e5a4-e98e-47f0-8738-c79178ab685b). |
| Member requests to order an Rx transferred over from a Prior PBM | Navigate to the **Prior PBM Rxs** section on the **Mail Rx** tab, select the Rx, and place the Refill as normal. Refer to the [Refill Process](#_Refill_Process) section above.  **Notes:**   * Clicking the **Prior PBM Rx #** hyperlink will display Prior PBM Prescription Details.      * From the **Claim Details**, you can view the Reject Reason of a Prior PBM Rx: |
| Prior PBM Rx unable to be refilled | If a Prior PBM Rx is unable to be filled, an () icon will be located next to the Rx # hyperlink. Select the checkbox next to the Rx # to display the Rx error message.  **Notes:**   * The Rx error message remains open until the agent dismisses the message. After closing the Rx error message, Compass deselects the Prior PBM Prescription that was selected. * If no error reason is present in the Rx error message, a link to the Rx’s prescription details is available for more information. * A description of the () icon will be in a legend locate below the **Prior PBM Rxs** table.     **Reminders:**   * A Support Task cannot be used for a prescription that has no refills; instead, refer to [Compass - Obtaining a New Prescription (Rx) for the Member (New Rx Request) (054208)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a7684ce9-c2bc-4cbc-ab37-c1ffb7789706). * If the Rx has refills and the error message displays, complete an [Offline Refill (056373)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=db21add8-521c-4f56-806b-2bd60acc39ed) to have the Rx refilled. |

### Search by Rx#:

|  |  |
| --- | --- |
| **Scenario** | **Action** |
| Rx Expired or No Refills Remain | 1. Utilize the **Search by Rx#** field if the **Rx #** does not show on the **Actionable Rx** table.  * Type in the **Rx #** and click **Search**.   **Note:** If unable to locate Rx#, review the **Rx History** tab.    **Result:** The Rx Notifications popup displays, and the Rx information is then added to the **Actionable Rx** table.     1. Click the **Add to Selected Rx(s)** button.   **Result:** Rx(s) are added to the **Selected Rx(s)** table.  **Notes:**   * Provider is contacted if the agent continues with the refill. This is preferred over starting a New Rx request. * To return to the **Mail Rx** tab, Click **Do Not Add to Selected Rx(s)**.  1. Continue to [Step 5](#RefillProcessStep5) in the Refill Process. |

### **Not Available/Not in Stock at Mail:**

|  |  |  |
| --- | --- | --- |
| **Scenario** | **Action** | |
| Prescription Not Available at Mail | Clicking **Refill/Renewal** button when placing the refill, if any of the medication(s) selected are Not Available at Mail.    **Result:** Not Available at Mail pop up will display.  Advise the caller of the options available to them:   1. Offer to check CVS retail inventory to determine if the medication is available for the caller to get at a local pharmacy. If the Check CVS Retail Inventory hyperlink is selected, the pop up will close, but Rx will not be removed from the Selected Rxs; the Rx will pre-populate in the CVS Retail Inventory screen. Refer to [Compass – Search for CVS Retail Inventory (Drug Shortage / Out of Stock) and View Claim Details (RxConnect) (066768)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c10d717e-f397-4f10-8fb6-3731cd856f5c) for more information.  * Do Not initiate a Mail to Retail Transfer Support Task; refer to [Compass - Prescription (Rx) Transfer (053932)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1e31ea60-77a3-4bb9-a619-7340ebf57484) for direction on Mail to Retail Transfer request.  1. Advise the caller they can contact their provider alternative medication. If the caller asks about alternatives, refer to [Compass - Viewing and Running Test Claims for Alternative Rx(s) (056849)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b3dbfb44-1c9e-47a6-b8f4-6010f553731b).  * Advise the caller any alternatives found would need to be discussed with their provider and a new prescription would need to be sent to our mail order pharmacy. * If no alternatives are found and the caller wants to continue with the medication that is **Not Available at Mail**, advise the caller they would need to fill the prescription at another in network pharmacy. If caller wants to transfer the existing Rx to an in-network pharmacy, refer to [Compass - Prescription (Rx) Transfer (053932)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1e31ea60-77a3-4bb9-a619-7340ebf57484) (Do Not initiate a Mail to Retail Transfer Support Task.) * If alternatives are found, run test claims to determine coverage and pricing for the alternatives to discuss with their provider.   **Review the following:** | |
| **If…** | **Then…** |
| If one or all the prescriptions initiated in the refill are not available at mail | The pop up will only have a **Close** button. When the **close** button is selected, the pop up will be dismissed and no action will be taken with the initiated order.    Remove the Rx(s) Not Available at Mail from the Selected Rx’s and then assist the caller with any other questions or concerns. |
| If a combination of prescriptions that are Available at Mail and Not Available at mail are initiated in the refill | The pop up will have a **Cancel** and a **Continue with Refill** button.    **Cancel:** When the **Cancel** button is selected the pop up will be dismissed and no action will be taken with the initiated order.  **Continue with Refill: If the user clicks Continue with Refill**, Compass will remove the prescriptions that are Not Available at Mail and any Rx(s) that are available that were selected during the refill flow will be carried over to the next step in the refill flow. |
| Prescription Not in Stock at Mail | Clicking **Refill/Renewal** button when placing the refill, if any of the medication(s) selected are Not in Stock at Mail.    **Result:** Not in Stock at Mail pop up will display.  Advise the caller of the options available to them:   1. Advise the call that the order can be placed, and the pharmacy will reach out to the provider for alternatives. Members registered to receive digital communication will periodically be notified on the status of the outreach. There may be a delay in fulfilling the order.  * If the member would like to choose this option, **check off the Rx(s)** and click **Continue with Refill** and the normal refill flow will continue. * If the caller wants to proceed with this, inform the caller that if they try and fill the original medication at another in network pharmacy, the order submitted would need to be canceled or the Not in Stock Rx would need to be placed on hold before it can be filled. * If the caller doesn't choose any prescriptions from the **"Not in Stock**" table and **clicks "Continue with Refill**," those unselected prescriptions will be removed. Compass will then proceed with the normal refill process for any prescriptions that were initially selected and are in stock.  1. Offer to check CVS retail inventory to determine if the medication is available for the caller to get at a local pharmacy. If the **Check CVS Retail Inventory** hyperlink is selected, the pop up will close, but Rx will not be removed from the Selected Rx’s. The Rx will pre-populate in the CVS Retail Inventory screen, refer to [Compass – Search for CVS Retail Inventory (Drug Shortage / Out of Stock) and View Claim Details (RxConnect) (066768)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c10d717e-f397-4f10-8fb6-3731cd856f5c) for more information.  * Do Not initiate a Mail to Retail Transfer Support Task, refer to [Compass - Prescription (Rx) Transfer (053932)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1e31ea60-77a3-4bb9-a619-7340ebf57484) for direction on Mail to Retail Transfer request.  1. Advise the caller they can contact their provider for an alternative medication. If the caller asks about alternatives, refer to [Compass - Viewing and Running Test Claims for Alternative Rx(s) (056849)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b3dbfb44-1c9e-47a6-b8f4-6010f553731b).  * Advise the caller any alternatives found would need to be discussed with their provider and a new prescription would need to be sent to our mail order pharmacy. * If no alternatives are found and the caller wants to continue with the medication that is **Not in Stock at Mail**, advise the caller they would need to fill the prescription at another in network pharmacy. If caller wants to transfer the existing Rx to an in-network pharmacy, refer to [Compass - Prescription (Rx) Transfer (053932)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1e31ea60-77a3-4bb9-a619-7340ebf57484) (Do Not initiate a Mail to Retail Transfer Support Task.) * If alternatives are found, run test claims to determine coverage and pricing for the alternatives to discuss with their provider.   Click **Cancel** to dismiss the pop up and no action is taken. | |

### Running a Test Claim:

|  |  |
| --- | --- |
| **Scenario** | **Action** |
| Test claims failed to run. Try rerunning test claims. (Banner message displays) | 1. Click the **Try rerunning test claims** hyperlink.     **Results:** The Refill Rx - Verify – Test Claim Results screen displays.   * The **Approved/Rejected** column displays: “Test Claim failed.” * The following message displays in the **Cost** section: “Test Claim failed. **Run a manual test claim**.” * The Total Cost is blank.  1. Click the **Run a manual test claim** hyperlink.     **Result:** The Test Claim subtab opens.   1. Return to [**Step 10**](#RefillProcessStep10). |

### MED D Only - Viewing Messages:

|  |  |
| --- | --- |
| **Scenario** | **Action** |
| Transition Fill is used (View hyperlink displays) | 1. Click the **View** hyperlink located within the **Messages** column.     **Result:** The Messaging screen displays.    **Notes:**   * If the medication is applying towards a **Transition Fill**, additional messaging will display under the **Additional Messages** section. * Messaging will be dynamic. * Once reviewed, agent can click **Close** to return to the Refill Rx - Verify screen.  1. Return to [**Step 10**](#RefillProcessStep10). |

### Denied Test Claim on Refill Rx – Verify screen:

|  |  |
| --- | --- |
| **Scenario** | **Action** |
| Test Claim **Denied**, view Rejection Code | 1. Click the hyperlinked code shown under the **Reason Code** column to view detailed reject information.    **Result:** Messaging for <Drug Information/Rx#> displays.  2. Review Reject Description, Reason Why Rejected, and Settlement Description. Click **Reject Code <#>** to view pharmacy next best actions.    **Result:** Pharmacy Next Best Actions for Reject Code <#> displays.  3. Review Pharmacy Next Best Actions. Click **Close** to return to Refill Rx – Verify screen.    4. Return to [Step 9](#RefillProcessStep9) above and determine next best actions for the member. Refer to [Compass - Rejection Codes and Resolutions (Reject 01 – Reject ZN) (067649)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=104c3318-95ba-42e2-bd05-17877b0a8045) as needed. |

### Confirming the Shipping Address/Phone Number ([Step 11](#RefillProcessStep11)):

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Scenario** | **Action** | | | | |
| The address is updated on the refill verification screen and the Availability Status Change indicator displays | If the status has changed from **Not in Stock** to **In Stock**. | **Availability Status Change** pop-up will display. The **Status Changed to** **In Stock** will display along with the impacted Rx(s).  a. Educate the caller that the status of the medication(s) is now in stock.    b. **Submit Refill** button.  **Result:** Refill Rx – Completed screen displays with banner: “Refill has been submitted.”  **Note:** Clicking **Cancel** will close the pop up and Refill Rx – Verify screen displays.   * If no changes are made on the Refill Rx – Verify screen and the Next button is selected again, this pop up will display again. | | | |
| If the status changes from **In Stock** to **Not in Stock** for **ALL** Rxs in the refill request. | **Availability Status Change** pop-up displays. The **Status Changed to** **Not in Stock** for **All Rxs** in the refill request.  **Note:** All Rxs will be removed from the refill request.     * Click **Close** to dismiss the pop up and no action is taken. The Rx Refill – Verify screen displays.   + If address is not changed back and the Next button is selected again, this pop up will display again. * Click **Cancel Refill Request** if caller does not want to refill any Not in Stock Rxs.   **Result:** Rx Refill tab is closed and Claims tab displays.  Advise the caller of the **Member’s options:** | | | |
| **Option** | **Action** | | |
| **1** | 1. The order can be placed, and the pharmacy will reach out to the provider for alternatives. Members registered to receive digital communications will periodically be notified on the status of the outreach. There may be a delay in fulfilling the order. 2. If the member would like to choose this option, **select** checkbox(es) for applicable Rx(s). | | |
| **If…** | | **Then…** |
| **ALL** Not in Stock Rxs are selected | | 1. **Cancel Refill Request** button changes to **Submit Refill** button.  **Note:** Caution message is removed:  All All Rxs will be removed from the refill request.  2. Click **Submit Refill**.  **Result:** Refill Rx – Completed screen displays with banner: “Refill has been submitted.” |
| **One** or **Some** Not in Stock Rxs are selected | | 1. **Cancel Refill Request** button changes to **Apply Updates** button.  **Note:** Caution message is removed:  All Rxs will be removed from the refill request.  2. Click **Apply Updates**.    **Result:** Refill Rx – Verify screen displays with unselected Rx(s) removed.  3. Review Rx(s) included in the Refill Request and confirm updated **Cost** with member.    4. Click **Next** to submit the Refill Request.  **Result:** Refill Rx – Completed screen displays with banner:“Refill has been submitted.”  **Note:** Inform the caller that if they try and fill the original medication at another in-network retail pharmacy, the order submitted would need to be canceled or Rx that is Not in Stock would need to be placed on hold before it can be filled. |
| **2** | Offer to check CVS retail inventory to determine if the medication is available for the caller to get at a local pharmacy. If the Check CVS Retail Inventory hyperlink is selected, the pop up will close but Rx will not be removed from the Selected Rxs. The Rx will pre-populate in the CVS Retail Inventory screen, refer to [Compass- Search for CVS Retail Inventory (Drug Shortage / Out of Stock) and View Claim Details (RxConnect) (066768)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c10d717e-f397-4f10-8fb6-3731cd856f5c) for more information.   * Do Not initiate a Mail to Retail Transfer Support Task; refer to [Compass- Prescription (Rx) Transfer (053932)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1e31ea60-77a3-4bb9-a619-7340ebf57484) for direction on Mail to Retail Transfer request. | | |
| **3** | Advise the caller they can contact their provider for alternative medications. If the caller asks about alternatives, refer to [Compass- Viewing and Running Test Claims for Alternative Rx(s) (056849)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b3dbfb44-1c9e-47a6-b8f4-6010f553731b).   * + Advise the caller any alternatives found would need to be discussed with their provider and a new prescription would need to be sent to our mail order pharmacy.     - If no alternatives are found and the caller wants to continue with the medication that is Not in Stock, advise the caller they would need to fill the prescription at another in network pharmacy. If the caller wants to transfer the Rx to an in-network Pharmacy, refer to [Compass - Prescription (Rx) Transfer (053932)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=1e31ea60-77a3-4bb9-a619-7340ebf57484). (Do Not Initiate a Mail to Retail Transfer Support Task.)   + If alternatives are found, run test claims to determine coverage and pricing for the alternatives to discuss with their provider. | | |
| If the status changes from **In Stock** to **Not in Stock** for **One** or **SOME** Rxs in the refill request. | **Availability Status Change** pop-up displays. The **Status Changed to** **Not in Stock** will display along with the impacted Rx(s).    a. Advise the caller of the Rx(s) that is Not in Stock and determine if Rx(s) is to be included in the Refill Request.  b. **Select** checkbox(es) for applicable Rx(s). | | | |
| **If…** | | **Then…** | |
| **None** of the Not in Stock Rxs are selected | | 1. Click **Apply Updates**.  **Result:** Refill Rx – Verify screen displays with unselected Rx(s) removed.  2. Review Rx(s) included in the Refill Request and confirm updated **Cost** with member.  3. Click **Next**.  **Result:** Refill Rx – Completed screen displays with banner: “Refill has been submitted.” | |
| **ALL** Not in Stock Rxs are selected | | 1. **Apply Updates** button changes to **Submit Refill** button.  2. Click **Submit Refill**.  **Result:** Refill Rx – Completed screen displays with banner: “Refill has been submitted.” | |
| **ONE** or **SOME** Not in Stock Rxs are selected | | 1. Click **Apply Updates**.  **Result:** Refill Rx – Verify screen displays with unselected Rx(s) removed.  2. Review Rx(s) included in the Refill Request and confirm updated **Cost** with member.  3. Click **Next**.  **Result:** Refill Rx – Completed screen displays with banner: “Refill has been submitted.” | |
| The Shipping Address/Phone Number the caller states are NOT available to select from the related drop-down menu | Authorized party callers (benefits offices, prescribers, individuals calling on behalf of the beneficiary, etcetera):   * Are NOT authorized to make **address changes**while placing an order. Only members (and designated individuals such as POAs) can make these requests. * Can NOT make **phone number changes** while placing an order. Refer to the [HIPAA Grid - CVS (028920)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce).  1. Click the **Add/Update** button next to the related drop-down menu.     **Result:** An **Addresses** or **Phone Numbers** tab will open so that you can add the new/updated information to the member’s account. Refer to the appropriate work instruction for more information as needed:   * [Compass - Add / Edit / Delete Mailing Address (053255)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9cfb4422-7129-4bca-b1ea-f1d6fa964906) * [Compass - Add / Edit / Delete Phone Number (053256)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c37d4289-63b2-4732-a35c-c411cc26a29c)      1. Return to the **Refill Rx** tab. 2. Click the drop-down menu and select the newly added/updated information.      1. Return to [Step 11](#RefillProcessStep11). | | | | |
| The member requires an Alternate Mailing Address | Authorized party callers (benefits offices, prescribers, individuals calling on behalf of the beneficiary, etcetera) are NOT authorized to make address changes while placing an order. Only members (and designated individuals such as POAs) can make these requests.  Refer to [Compass - Add / Edit / Delete Mailing Address (053255)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9cfb4422-7129-4bca-b1ea-f1d6fa964906). | | | | |
| The member selects expedited shipping to a P.O. Box and states they are unable to provide a physical address. | Create the following Support Task:   * **Task Type:** Refills Request-Offline Refills * **Notes:** Member unable to provide physical address for expedited shipping. Please ship expedited, member agrees to pay for shipping charge.   Refer to [Compass - Offline Refill (056373)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=db21add8-521c-4f56-806b-2bd60acc39ed) for additional information. | | | | |
| The member indicates to NOT ask for a physical address again. | 1. Create the following Support Task:    * **Task Type:** Refills Request – Offline Refills    * **Notes:** Member unable to provide physical address.   Refer to [Compass - Support Task Types and Uses List (058147)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6753488f-3996-45d9-88ba-257575369a98) for additional information.   1. Call the Senior Team for assistance.   **Notes:**   * The **Address Opt Out** box should only be selected by the Senior Team. The Address Opt Out box is on the Patient Profile screen in PeopleSafe. If you are still in Compass, the **Address Opt Out** will be in **Mail Order Profile** button on the Member Snapshot. * Opt Out will not affect the hard stop on the Order Placement screen. If the member requests the Rx again in the future, the CCR is prompted to ask again for a physical address. | | | | |
| The member is using a P.O. Box with Cold Pack | * If the member is using a PO Box or an APO, FPO, DPO and one or more of the prescriptions require a cold pack, a Warning Review Icon displays. For questions regarding shipping options, refer to[Compass - Shipping Guidelines and Fees (053427)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e77f513c-0e5e-4aaa-b674-de935ed25901).      * If upgraded shipping is selected, once the order is complete, it will automatically be expedited in the pharmacy. However, standard processing turnaround times should still be quoted for the order. | | | | |
| The caller requests the Mail Pharmacy Address or Regional Order Creation Center (ROCC) Address | * To locate the member’s Mail Pharmacy Mailing Address or Regional Order Creation Center ( ROCC) Address, refer to [Compass - Claims Landing Page (049993)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c8f0ac8f-b076-4187-944d-2cf65b0ec799) and review the Mail Pharmacy Address function under the Mail Rx section. * For all other Mail Pharmacy Address or Regional Order Creation Center ( ROCC) Address inquiries, refer to [Phone Numbers (Contacts, Departments, Directory, Addresses, Hours and Programs) (004378)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f22eb77e-4033-4ad9-9afb-fc262f29faad). | | | | |

### Confirming the Payment Method ([Step 12](#RefillProcessStep12)):

|  |  |  |  |
| --- | --- | --- | --- |
| **Scenario** | **Action** | | |
| Selecting an existing payment method | When selecting an existing account from the **Payment Method** dropdown, you must verify with the member:   * **For Credit Cards:** Last four (4) digits and expiration date. * **For eChecks:** Financial institution and account type.   ONLY IF you are speaking to an authenticated member, Power of Attorney and/or Legal Representative, you mayverify this information by proactively providing the default payment method information on file.   * + If you are speaking with an authenticated third-party caller, ask them to provide the payment method information. DO NOT proactively offer this information.   **Note:** If the caller indicates they want to split the payment between multiple Payment Methods, refer to [Compass - Split Payment (More Than One Method of Payment) for an Order (054227)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9da60cbd-81ae-4908-9c7e-7b8fbb59aa39). | | |
| Credit Card has Expired and ONLY the expiration date needs to be updated. | * Click **Add/Update** next to the **Payment Method** drop-down menu. 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. * After the payment method has been updated, return to the **Refill Rx** tab, and confirm update to payment method.   **Note:** If the member does not have a new expiration date for the credit card, ask for a different method of payment. | | |
| Credit Card has Expired and/or member wants to add new Payment Method | * Click **Add/Update** next to the **Payment Method** drop-down menu. 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. * After the payment method has been added, return to the **Refill Rx** tab, and choose the added payment method from the **Payment Method** drop-down. | | |
| The Copay is $0.00 | Proceed depending on which of the following scenarios applies: | | |
| **If the member…** | | **Then…** |
| **Has a Payment Method on file** | | Select the caller’s desired payment method from the **Payment Method** drop-down menu.  **Note:** If the payment method on the member’s account is expired, attempt to update payment method. |
| **Does not have a Payment Method on file** | | Attempt to obtain and add a payment method to the member’s account.   * If the caller chooses to add a payment method, 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) for instructions on adding a credit card. * If the member declines to add a Payment Method to the account, in the **Payment Method** dropdown choose the selection “Member does not want to add payment.” |
| **Has a credit balance on the account** and with the credit the calculation of the total cost is $0.00 | | Select **Member does not want to add payment** from the **Payment Method** dropdown. |
| **Has a Previous Balance on the account over the client’s threshold or**  **The amount of the order is over the client’s threshold** | | The caller needs to add a method of payment to proceed with the order. 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) for instructions on adding a credit card. |
| Member has a credit on their account | Advise the member:  There is currently a credit of <$$.$$> on file. The credit amount will be applied to the cost of the order.  **Note:** If the member’s account is part of a family account, the credit amount may be the result of another member’s payment on the account.   * If the member does not want the credit on file to be applied to the order, refer to [Compass - Offline Refill (056373)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=db21add8-521c-4f56-806b-2bd60acc39ed). Include in the task notes why you are sending the Support Task and include the Rx # and the last 4 digits of the credit card on file that should be used for payment.   **Example:** Wife sends a check via mail for her meds and husband pays with a credit card on file. In the Manual Support Task Notes, include: “Task sent because there is a credit of $ on file and that credit is for Mary. This refill Rx#1234567 is for Bob who uses credit card on file ending 1234.” | | |
| Member has a Previous Balance and disputes the amount or wants to make a partial payment | You must inform the member of the total amount due including the Previous Balance.   * **If the member is disputing the Previous Account Balance,** 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). * **If member asks to make a partial payment on the previous balance or to pay the balance at a later time** (as long as balance is not over client threshold, if applicable), perform the following steps:  1. Click the **Partial Payment** button.   Once the **Partial Payment** button is selected, an amount MUST be entered in the new **Partial Payment** field in order to proceed with the order.     1. Input the amount member wishes to pay toward the balance at this time, then press **Tab**.   **Note:** Any amount between zero dollars (0.00) and the Previous Balance can be entered.   * + If member is currently disputing balance or states they have mailed a check for balance, input “0.00” in the partial payment amount.     **Result:** The **Previous Balance** and **Total Cost** fields will repopulate based on the Partial Payment amount entered.     1. Quote the new **Total Cost** amount to the caller.   **Note:** If there is a Previous Balance and the new order places the member over their Floor Limit, advise them that payment is needed to process and ship the new order. | | |
| Member requests copay installments | If the client allows copay installments, refer to [Compass - Copay Installment Payments (057183)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=14e13366-0206-4670-9b6f-15de902471d6). | | |
| Member wants to do a split payment | Refer to [Compass - Split Payment (More Than One Method of Payment) for an Order (054227)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9da60cbd-81ae-4908-9c7e-7b8fbb59aa39). | | |
| Member requests to have a bill sent AND the client allows Fill and Bill | If the Client allows Fill and Bill, it will display as an option in the **Payment Method** drop-down menu. Refer to [Compass - Payment Fill and Bill (025493)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0d911c06-a035-4993-b59a-c848a7d96831) as needed.  **Note:** Fill and Bill is not considered a default payment. If member has no other payment method on file, the **Payment Method** dropdown will need to be clicked to access the Fill and Bill option.   1. Ask the member if they would like to use a method of payment or if they would like to be billed.   **Note:** Obtaining a payment method should be attempted on every call.   1. Select **Fill and Bill** only if the member specifically requests to be billed for their order.     Refer to the following additional scenarios as needed: | | |
| **If…** | **Then…** | |
| There is a balance on the account over the client’s Maximum Mail Order Balance (Threshold)  **OR**  The amount of the order is over the client’s Maximum Mail Order Balance (Threshold) | The following error message displays in red font: “Total Cost exceeds Fill and Bill limit of <$xx>”.  The member must provide a method of payment for the order. | |
| Fill and Bill is not available in the Payment Method dropdown BUT the client allows Fill and Bill | 1. Verify that the client allows Fill & Bill by referring to the **CIF** and the member’s account in Compass. **Fill And Bill** eligibility can be determined from the Member Snapshot Landing Page in Compass as follows:  * Click **Mail Order Payments**. * Review the **Alternative Payment Options** drop-down section:   + If **Fill And Bill** displays **No** under the Eligible column, a method of payment is needed to place an order.   + If **Fill And Bill** displays **Yes** under the Eligible column, the client allows **Fill And Bill**.      1. Refer to [Compass - Offline Refill (056373)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=db21add8-521c-4f56-806b-2bd60acc39ed) for further assistance to complete the order.   **Reminder:** A Support Task cannot be used for a prescription that has no refills; instead, refer to [Compass - Obtaining a New Prescription (Rx) for the Member (New Rx Request) (054208)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a7684ce9-c2bc-4cbc-ab37-c1ffb7789706). | |
| The member prefers to make a payment after the order processes | The member can mail a paper check accompanied with the mail order form. It is PBM policy to obtain payment for an order with the amount due; a payment is required at the time an order is placed.  If the member is escalated, reach out to [Senior Team (057524)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7653e7c2-1a97-42a0-8a81-6267c72e1ca9). | | |
| The member requests to remove card after placing order | One-time payments are only available to be used on existing balances, not on refill 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).  Removing the card before the order has processed could delay the order. | | |

### Clicking Next on the Refill Rx - Verify screen and a pop-up message displays ([Step 13](#RefillProcessStep13)):

|  |  |  |
| --- | --- | --- |
| **Scenario** | **Action** | |
| The Test Claim failed to run automatically (pop up displays) | The Review the Following pop-up message below displays: “The test claim failed to run automatically. Verify you have provided the copay.” A manual Test Claim is needed to provide the member with the copay amount.:    If Manual Test Claim has been run:   1. Click the **Check Box** “I have run a manual test claim and provided the copay amount to the member.”   **Result:** The **Place Order** button will illuminate.   1. Click **Place Order** to continue with the order.  * Click **Cancel** to return to the Refill Rx – Verify screen. | |
| Member is using an existing EXCLUSIVE payment method (popup displays) | The following Payment Method Exclusive to Other Member pop-up message displays: | |
| **If the order…** | **Then…** |
| Includes Rx’s for the originator of the exclusive account **AND**  The originator is on the phone placing the order | 1. Click the **Check Box** for “I have spoken to and authenticated <Member Name>.”   **Result:** The **Place Order** button will illuminate.     1. Click **Place Order** to continue with the order.    * Click **Cancel** to return to the Refill Rx – Verify screen. |
| Does not include any Rx’s for the originator of the exclusive account  **AND**  The originator is on the phone placing the order | 1. Inform the member that the payment account is designated for their use only. 2. Confirm they would like to apply it to the order for the other family member(s).    * If yes, click **Check Box** and click **Place Order** to complete the order.    * If no, click **Cancel** to return to the Refill Rx - Verify screen. |
| Includes only Rx’s for the originator of the exclusive account  **AND**  The originator is **NOT** on the phone placing the order | The account should only be used with the originator’s permission.  Ask if the originator is available to speak with you for a moment to authorize the transaction.   * If yes, authenticate the originator, click **Check Box,** and click **Place Order** to complete the order once authorization is confirmed. * If not available, click **Cancel** to return to the Refill Rx – Verify screen. Suggest that a different payment account be used or for the originator to contact us (or login to the Member Web Portal) at their convenience to apply the payment.   **Note:** POAs are authorized to act on behalf of the member and can apply payments to an exclusive. |
| Does not include any Rx’s for the originator of the exclusive account **OR** includes a mix of Rx’s for the originator of the exclusive account and Rx’s for other family members  **AND**  The originator is **NOT** on the phone placing the order | The account should only be used with the originator’s permission.   * Ask if the originator is available to speak with you for a moment to authorize the transaction.   + If yes, click **Check Box** and click **Place Order** to complete the order once authorization is confirmed.   + If not available, click **Cancel** to return to Refill Rx – Verify screen. Suggest that a different payment account be used or for the originator to contact us (or login to the Member Web Portal) at their convenience to apply the payment.   **Note:** POA’s 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-plan member calling on behalf of the plan 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. Click authentication check box to proceed. * Seek assistance if you are unsure or feel that the situation may lead to unauthorized use of the account. |
| P.O. Box shipping is not recommended (dual popup displays) | Advise the member of the displayed P.O. Box shipping warning and refer to [Compass - Shipping Guidelines and Fees (053427)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e77f513c-0e5e-4aaa-b674-de935ed25901) for additional information about Cold Pack shipping to a P.O. Box.    **Note:** In the above example, the popup contains **dual messaging**. Both checkboxes must be selected before the order can be placed. To address the **Exclusive Payment** portion of the popup, refer to the “Member is using an existing **EXCLUSIVE** electronic payment method” scenarios listed below. | |
| Credit Card has Expired. Please select Another Credit Card | Refer to the [Confirming the Payment Method](#_Confirming_the_Payment) scenarios above. | |
| Credit card pre-approval is denied or partially approved | **If the card…** | **Then…** |
| Is denied | I am sorry, but your credit card account has been denied. Can you provide an alternate method of payment?  Refer to the [Confirming the Payment Method](#_Confirming_the_Payment) scenarios above. |
| Is partially pre-approved | * + If the member would like to use an alternate method of payment for the entire order, refer to [Confirming the Payment Method](#_Confirming_the_Payment) scenarios above.   + If the member would like to split the order between two methods of payment, submit an [Compass - Offline Refill (056373)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=db21add8-521c-4f56-806b-2bd60acc39ed). |
| System Error on Refill Screen | The system will not allow submission of a refill.  Submit an [Compass - Offline Refill (056373)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=db21add8-521c-4f56-806b-2bd60acc39ed). | |

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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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