**Compass - Mail Order History / Order Status**

[View Mail Order History Details and Status 1](#_Toc190865980)

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**Description:** Steps to use when researching the status of a Mail Order. Orders on the Mail Order History tab indicate the order has been adjudicated (processed through member’s insurance). The Mail Order History table will show the status of the orders after adjudication.

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| View Mail Order History Details and Status |

**Notes:**

* Order Status - The status of the entire Order.
* Status/Rx Status - The status of each Rx within the Order.

 If **Order** **Status** shows **Shipped**, payment method and shipping address information for the order **CANNOT** be updated.

Advise the member that after the order has been shipped, we can only update the payment method and shipping address for **FUTURE** orders or they can go to Caremark.com to update the information for **FUTURE** orders.

**Reminders:** When checking the status of an order:

* Ask member how much medication they have on hand.
  +  The reason we ask for days’ supply on hand is to ensure that our members do not run out of or go without needed medications. We want to show empathy and provide options for our members. We do not want to assume the member has the medications they need until they receive their next supply.
  +  Understand the positive impacts to members: You will ensure that members do not run out of medication, and you will make them feel that you are looking out for them.
  +  Follow Compass guided language. For example: “Do you have more than a 5 days’ supply of medication on hand?”.
* Verify the order details such as the nameof provider, medication, strength, and dosage with member.
* Verify shipping address, call back number, and messaging alert preferences with the member.
* Educate the member on the advantages of Caremark.com such as placing refill orders, checking the status of orders, and checking coverage for medications. Offer to send a registration link if the member is not yet registered.
* 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).

** Note:** 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) [https://thesource.cvshealth.com/nuxeo/thesource/ (063003)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=91f73b9d-e568-48dd-9ab4-88cb2654d4c9) or [Compass – Search for CVS Retail Inventory and View Claim Details (RxConnect) (066768)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c10d717e-f397-4f10-8fb6-3731cd856f5c).

**Note:** Refer to the [HIPAA Grid (028920)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5b354e50-0d15-42d0-b9c2-0711ea02d9ce) when making any changes to an order if you are not speaking to the member directly.

To view order details and status, follow the steps below:

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| **Step** | **Action** | | | |
| **1** | Navigate to the Claims Landing Page,then click the **Mail Order History** tab.  **Result:** Mail Orders within the default 90-day window display.  **Note:** When a prescription has been sent in by the prescriber, but it is not yet fully adjudicated, it will not show in the member’s mail order history tab. Instead, a message will show at the top of the claims tab that says “There are orders awaiting pharmacy translation. View by Family to display.” Select “Family” under the “View by Member or Family” tab to see these orders. | | | |
| **2** | 1. Determine the name of the prescription(s) the caller is inquiring about, then locate the order. 2. Click the chevron arrow next to the **Order Number** link to expand/collapse a preview of the prescriptions in the order.     **Result:** Order Status and Rx Status displays.  **Notes:**   * Locate the Rx by using **Search by** **Order #, Rx # or Drug Name** search field. (Search criteria populates based on **Family Member** and **Date Range** selected prior to search).   + Full drug name is NOT required for search (**Example:** Ator). * If no Rx(s) is found, Compass will display the following message: “No orders found that match your search criteria.” * To view orders in **Future Fill**, use the **Show Last** filter. * Filter search results by using the **Date Range** fields and then clicking **Apply**. * Click the **Refresh Orders** button  to refresh the **Mail Order History** tab as needed. * If you are unable to locate the prescription(s), refer to the [Scenario Guide](#_Scenario_Guide).   Prescriptions with **Shipped** in the **Status** column and a date in the **Status Date** column indicate that the shipping label has been printed as of that date. The **Status Date** is the label print date, NOT the actual shipped date. Do NOT advise the member that their order has shipped based on the **Status Date**. | | | |
| **Order Status Type** | **Definition** | | |
| Processing | The order has been adjudicated and awaiting fulfillment.  For pending orders placed within 15 minutes awaiting entry into the Mail Order Pharmacy or awaiting Adjudication and have not formally processed through members insurance, refer to [Compass – Editing and Cancelling In Process Orders (057232)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=98a7a9d6-b7fc-4471-9168-f6e3c3d2a14a).  If the order is in Processing and the caller asks about updating the shipping address on the order, refer to the [Scenario Guide](#_Scenario_Guide). | | |
| Shipped | The order has been fulfilled and dispatched for shipping. Review the tracking number to determine ship date and details. If no tracking number exists, the order has been shipped but is awaiting pick-up from the courier. | | |
| Rejected | The claim was adjudicated but could not be fulfilled.  Check to see why the order was rejected and if the reason can be or already has been resolved. If so, and the member still needs the RX, place a new order for the member. | | |
| **3** | 1. Once the order is located, click the **Order Number** hyperlink.   **Result:** The Order Details Screen displays.   1. Verify the shipping address of the order. If the shipping address is incorrect, refer to [Scenario Guide](#_Scenario_Guide).     **Result:** Compass displays the following Order/Prescription information: | | | |
| **Display** | | **Defined** | |
| Order Number | | Number of the order. | |
| Order Status | | * In Process * Cancelled * Shipped * Etcetera. | |
| Order Received Date | | Date the order was received. | |
| Dispensing Pharmacy | | Pharmacy that will be mailing the medication. | |
| Receive Mode | | Shows how the prescription was received.   * AUTO REFILL/AUTO RENEWAL - Refilled via the Auto Refill/Renewal program. * CSR - Customer Care Rep placed the order. * ERX - Provider sent electronic prescription. * FAX - Provider faxed prescription. * IVR - Authenticated Caller placed refill/renewal through inbound call to us using IVR system. * IVR Import - Automatic outbound call made to member and they authorized refill/renewal via phone call. * Mail - Physical prescription mailed to us. * PHONE - Provider’s office called Fast Start. * TXT - Member ordered via SMS. * WEB - Order placed on Caremark.com. | |
| Consolidated Orders | | * Separate orders that have been combined into one (1) to ship at the same time. * Prescription orders for a member and/or member’s household can be consolidated with one another. * HIPAA and state regulations are carefully followed so that our member’s personal health information (PHI) is not compromised. * The Mail Order Facility works within a set of rules to determine if there are any orders being sent to the same address that can be consolidated with one another. * Consolidated orders are **NOT** sent if the receiving member is not an authorized party on the other member’s account or if members share an address but have different accounts.   **Examples:**   * Two adults may not be consolidated into a single order unless permission has been granted. * Parent and child medications may be consolidated into a single shipment * Orders are not held to consolidate them into one shipment. Order processing turnaround times are not affected by this change. | |
| Rx Actions and Order Actions dropdown | | Available actions that can be made on Prescriptions and Orders.  The system will show help text above the Rx Actions and Order Actions within Order Details to educate the user about options potentially being disabled due to the status of the order or the status of the prescriptions. The help text displays: “Options may be disabled based on the status of the order or prescriptions.” | |
| **4** | Click the chevron arrow next to the member’s name to expand the Rx details of the order.  **Notes:**   * Click on the Rx number and the **Prescription Details** tab to see prescription details, including name of medication, strength, manufacturer, etcetera. * Click the **Drug Name/Strength** hyperlink to display the Drug Details screen. * For more information on **Dispensed Quantity**, click the Tool Tip. (Packaged medication message displays.) * The following options will be **disabled** if the agent in a **Research Case**: Cancel Rx, Cancel Order, Request Bridge Supply, Shipping Method, Shipping Address, and Payment Method. * If **more than one** member’s prescriptions are included in the order, the system displays the following message at the bottom of the Order Details screen: “Please make sure that all the members in the order have been authenticated.” * Agent has the ability to view an image of the mail order form (if one was sent in) via the **Mail Order Form** tab on the Order Details screen. * **Order updates** can be made on the Order Details screen (**Shipping Options**, **Address**,and **Payment**). For assistance, refer to the [Scenario Guide](#_Scenario_Guide). * The list of prescriptions are organized by member; each member’s prescription initially displays in a collapsed section, but the agent canclickthe chevron arrow to expand/collapse each Member section. * If Order Status is **Pending Carrier Pickup**, click the tool tip for more information. * **Excessive Days’ Supply:** The days’ supply is initially calculated by dividing the prescribed quantity by the directed daily dosage. This number may exceed plan limitations, particularly items dispensed in unbreakable packages. As part of the dispensing process, a pharmacist will review and adjust the prescription to align it with plan allowances. A new prescription is not necessary. * Compass will display an indicator for cold pack drugs when included in an order. | | | |
| **Display** | | | **Definition** |
| Rx Details | | | Drug Name, Rx #, Dispensed Qty, Rx Status, Cost, and Days’ Supply, Manufacturer, etcetera. |
| Hold, Remove, Discontinue, Brand vs Generic button | | | Options available if the member does not need the medication. (Brand vs Generic button only enabled on FEP accounts) |
| Rx Status, Rx Status Description, Action to be Taken | | | Current status and description of the order being processed. |
| Conflict Table | | | Clicking the chevron arrow next to Conflicts displays conflicts sorted with Unresolved conflicts first ordered by Most Recent Date on top and will show the Resolved conflicts ordered by Most Recent Date on top. |
| Conflicts | | | Allows agent to view conflicts pertaining to the order and can be collapsed by default. Refer to [Compass - Manage Diverts/Conflicts (Release Order) (056291)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d4ef5860-ef38-4ae9-afd8-a4cb0d1f12e6). |
| Additional Members dropdown | | | Have the option to expand each member. |
| Shipping Options and Shipping Address | | | The method with how the order is being shipped and the address the order is being shipped to. |
| Total Cost | | | The total payment amount due for the order.  **Note:** The tool tip next to Total Cost displays the following message: “Total Cost includes only the amount of this order. Check Mail Order Payment History for any Previous Balance that may have been paid when order was placed.” |
| Payment Method | | | The type of payment method the member is using to pay for the order. |
| **5** | Review and confirm medication information with the member (name, strength, form, quantity, and day supply). | | | |
| **6** | Ask how much medication the member has on hand. Refer to [Compass - Member Low or Out of Medication (063003)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=91f73b9d-e568-48dd-9ab4-88cb2654d4c9) as needed. | | | |
| **7** | Review the **Rx Status** and **Rx Status Description** field of the Rx Details to advise the caller on the prescription.    If the caller wants to update the address on the order and the **Rx Status Description** reflects “We are dispensing your prescription,” refer to the [Scenario Guide](#_Scenario_Guide). | | | |

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| View Prescription Details and Status |

Follow the steps below:

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| **Step** | **Action** | |
| **1** | 1. From the **Mail Order History** tab, locate the order with the prescription(s) the caller is inquiring about. 2. Click the chevron arrow next to the **Order Number** link to expand/collapse a preview of the prescriptions in the order.     **Result:** Order Status and Rx Status displays.  **Notes:**   * Locate the Rx by using Search by Order #, Rx# or Drug Name search field. (Search criteria populates based on Family Member and Date Range selected prior to search). * Filter search results by using the Date Range fields and then clicking Apply.   If unable to locate the prescription(s), refer to the [Scenario Guide](#_Scenario_Guide).   * Click the **Drug Name/Strength** hyperlink to display the Drug Details screen.   For all situations where a member is at risk of being low or out of medication due to shipping agents, refer to [Compass - Member Low or Out of Medication (063003)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=91f73b9d-e568-48dd-9ab4-88cb2654d4c9).  Prescriptions with **Shipped** in the **Status** column and a date in the **Status Date** column indicate that the shipping label has been printed as of that date. The **Status Date** is the label print date, NOT the actual shipped date. Do NOT advise the member that their order has shipped based on the **Status Date**. | |
| **Prescription Status Type** | **Definition** |
| Processing | The order has been adjudicated and awaiting fulfillment.  Your order is being filled.  For pending order placed within 15 minutes awaiting entry into the Mail Order Pharmacy. Orders awaiting Adjudication and have not formally processed through members insurance refer to [Compass - Editing and Cancelling In Process Orders (057232)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=98a7a9d6-b7fc-4471-9168-f6e3c3d2a14a).  If the Rx is in Processing and the caller asks about updating the shipping address on the order, refer to the [Scenario Guide](#_Scenario_Guide). |
| Shipped | The order has been fulfilled and dispatched for shipping. Click the tracking number hyperlink to determine shipping date and tracking information. If no tracking number exists, the order has been shipped, but awaiting pick-up from the carrier.  Your order is on the way. |
| Pending Carrier Pickup | The order has been fulfilled and dispatched for shipping. Click the tracking number hyperlink to determine shipping date and tracking information. If no tracking number exists, the order has been shipped but is awaiting pick-up from the carrier.  Your order is being prepared for shipping. |
| Rejected | The claim was adjudicated but could not be fulfilled. |
| Future Fill | If an order contains one or more prescriptions that are too early to process, it is held in the Future Fill queue until the prescription(s) is ready to be processed.  Your order will be filled on a later date.  **Note:** Controlled medications are excluded from the Future Fill process. Any controlled medication prescriptions that are too early to fill will be returned to the member.   * Rejected RBP (Returned by Patient) * Previously shipped order that has been returned by patient. Check comments for a Returned Goods Materials. |
| Moved | Prescription was moved to another order. Check for a newer order for the medication. It should have the same prescription number.  If the member was expecting multiple prescriptions in one order, let them know that they will receive two (or more) shipments. |
| **2** | Review the list of results displayed under the **Rx #** column in the Claims Table, then click the desired **Prescription Number** hyperlink to view the prescription and prescription details.    **Result:** The Claim Details screen displays.  This screen includes the following tabs:   * Quick View * Prescription Details * Drug * General * Medicare Part D * Alerts   **Note:** For more details on these tabs, refer to the **Mail Order History** section of [Compass - Claims Landing Page (049993)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c8f0ac8f-b076-4187-944d-2cf65b0ec799).    **Note:** These tabs can also be viewed from **Transmission Details** and **Financial Details**.  **Excessive Days’ Supply:** The days’ supply is initially calculated by dividing the prescribed quantity by the directed daily dosage. This number may exceed plan limitations, particularly items dispensed in unbreakable packages. As part of the dispensing process, a pharmacist will review and adjust the prescription to align it with plan allowances. A new prescription is not necessary. | |

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| Viewing and Adding Order Alerts |

To ensure the member's request is cared for, it is important to review the **Alerts** panel AND **Order Alerts**.

**Note:** Use a professional tone when writing notes/comments. Do**not**include:

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

To view **Order Alerts** or **Add Order Alerts** during the call you must complete the following steps:

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| **Step** | **Action** |
| **1** | Navigate to the **Claims Landing Page,** then click the **Mail Order History** tab.  **Result:** Mail Orders within the default 90-day window display.    **Notes:**   * Agent can filter search results by using the **Date Range** and clicking **Apply**. * Click the chevron arrow to expand/collapse and expand a preview of the prescriptions in the order. |
| **2** | Click the **Order Number** hyperlink.      **Result:** The Order Details screen displays. |
| **3** | Click the **Alerts/Notes** tab to view Alerts, then click the **Add Alert** button.  **Result:** Add Order Alert modal displays. Order Notes/Alerts View:      **Notes:**   * Alerts are listed by most recent first.   + If there are no alerts, the following message displays: “No records found.” * Filter search results by entering a **Start/End** date and then clicking **Apply**. * Add Order Alerts by clicking the **Add Alert** button. * Search by Drug Name Coming Soon. * Hover over the **Create Date** to show creation details. * Prescription may have been changed due to Intervention’s process as part of the member’s prescription benefit plan. If the member is unhappy with this change or has questions, refer to [Compass - Intervention Changeback (062768)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=2379cb90-2a49-4be2-a38d-6d66d10365fe). |
| **4** | Add notes to the **Alerts Details** section, then click **Save**.  **Note:** If order is in process, adding an alert will not stop order from being shipped out. Instead, refer to [Compass - Stop Tote Requests (057999)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a4299650-04b0-46ee-b152-84f81ee81658). |

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| Rx Alerts (View Only) |

Compass automatically generates Rx Level Alerts based upon actions completed.

Complete the following steps:

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| **Step** | **Action** |
| **1** | Navigate to the **Claims Landing Page**, then click the **Mail Order History** tab.      **Result:** Mail Orders within the default 90-day window display. |
| **2** | Click the **Order Number** hyperlink.    **Result:** The Order Details screen displays. |
| **3** | Click the **Rx Alerts** tab to view Rx Alerts:    **Notes:**   * Alerts are listed by most recent first.   + If there are no alerts, the following message displays: “No records found.” * Filter search results by entering a **Start/End** date and then clicking **Apply**. * Search by Drug Name Coming Soon. * Hover over the **Create Date** to show creation details. * Prescription may have been changed due to Intervention’s process as part of the member’s prescription benefit plan. If the member is unhappy with this change or has questions, refer to [Compass - Intervention Changebacks (062768). (004594)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=92f4cbaf-20a3-4f57-a897-7b2f9f1b4f36) |

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| Address Changes on Orders with Multiple Members including Minors |

Important **Minor** Information:

* Some clients consider a child to be an adult at an age less than 18. Refer to the CIF.
* Refer to the **Member Details** panel on the **Member Snapshot Landing Page** or the **Claims Landing Page** to determine the age of the member in session.

** Do not** release the names of STD, Birth Control, or anti-psychotic medications if a child 13 years or older has instructed us to keep this information private.

* **Foster Care:** Check CIF for any additional authenticators for minors in Foster Care.

Follow the steps below to update address:

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| **Step** | **Action** | |
| **1** | Verify the member that needs the address change on the order in question.   * If the member in session (listed in the **Member Details** section) needs the address change, skip to Step 3. * If the member in session (listed in the **Member Details** section) is NOT the person needing the address change, proceed to Step 2. | |
| **2** | From the Member Snapshot Landing Page, navigate to the **Member Details** section and click the **View Related Members** hyperlink.  If the member calling to update the address is not the person displayed within the **Member Details** panel, agent would need to authenticate them with the caller.    **Result:** The Related Family Members popup displays.     * Select the member needing the address change on the order in question. Proceed to the next step.   **Notes:**   * To exit the Related Family Members popup, click **Cancel**. * Compass only shows corresponding lines of coverage for each member on the account. * When the agent selects the **family member name** hyperlink from the modal, the selected member’s information will populate. | |
| **3** | Navigate to the Claims Landing Page andclick the**Mail Order History**tab.  **Result:** Mail Orders within the default 90-day window display. | |
| **4** | Once the order is located, click the **Order Number** hyperlink.  **Result:** The Order Details screen displays.  **Notes:**   * Agent can filter search results by using **Show Last** and filtering up to 2 years. * Click the chevron arrow to expand/collapse a preview of the prescriptions in the order (refer to **View Prescription Status and Details** section for assistance). | |
| **5** | From the **Use Settings For** drop-down menu, select the preferred Member’s name.  **Notes:**   * Drop-down options will vary depending on which member(s) have prescriptions in that order. * The drop-down menu will default to the Cardholder if the person the agent is viewing is not the Cardholder/Spouse. For assistance, refer to the **If/Then** table below.     If the order contains Rx's for multiple members, Shipping Addresses available will be restricted (to the Cardholder or Spouses address) to those that belong to **adult** members on the account (**Add/Update** button will be disabled). Agent will refer to [Step 2](#AddressChangesMultiMembersStep2), to update the (adult) member in session before being able to update preferred address on the order.  Refer to below scenarios as needed: | |
| **If…** | **Then…** |
| Cardholder and Spouse on the order | * 1. If address change is restricted, refer to [Step 2](#AddressChangesMultiMembersStep2), to update the (adult) member in session before being able to update the (adult’s) address on the order.   2. Once the preferred settings are selected, proceed to the next step.   **Notes:** The **Use Settings For** drop-down menu:   * Defaults to the member in focus, with Card Holder and Spouse. * If the member in focus is not on the order, dropdown will default to Card Holder.   **Over 18 years of age:**  **Legal Guardian or POA:** To make any account level changes or proactively release any information we must have valid legal documentation (POA, Authorization form) to support their legal authority to act on behalf of the patient. This may be a durable POA that was signed while the patient was still competent, or a court appointment of a guardian / custodian or some sort of legal documentation. |
| Minor only in the Order | Some clients consider a child to be an adult at ages less than 18. Refer to the CIF.  Orders for **minors** must be sent to either the cardholder or adult spouse’s address. The phone number and payment method must also be associated with this same individual.  From the **Use Settings For** drop-down menu, select the name for the Cardholder or Spouse.   * If the address or payment method is **correct**, no future action is needed. * If the address or payment method is **incorrect**, select the preferred address and/or payment from the **New Shipping Address** or **New Payment Method** drop-down menu(s). Proceed to the next step. * To cancel any updates, click **Reset**.   **Note:** If member is a minor the **Add/Update** buttons will be disabled. (Agent can only select settings for the Cardholder or Spouse.) |
| Minor and Both Card Holder and Spouse on the order | * If address change is restricted, refer to [Step 2](#AddressChangesMultiMembersStep2), to update the (adult) member in session before being able to update the (adult’s) address on the order. * If member in focus is a Minor the **Add/Update** buttons will be disabled. (Agent can select settings for the **Cardholder** or **Spouse**.)   Once the preferred settings are selected, proceed to the next step.  **Notes:** The **Use Settings For** drop-down menu:   * Both Cardholder and Spouse displays in the drop-down menu. * Dropdown will default to the member in session if it is the Cardholder/Spouse. * Dropdown will default to Cardholder if the member in session is other than the Card Holder/Spouse. |
| Minor and Adult in Order | * If address change is restricted, agent will refer to [Step 2](#AddressChangesMultiMembersStep2), to update the (adult) member in session before being able to update the (adult’s) address on the order. * If member in focus is a Minor the **Add/Update** buttons will be disabled. (Agent can select settings for the **Cardholder** or **Spouse**.)   Once the preferred settings are selected, proceed to the next step.  **Notes:** The **Use Settings For** drop-down menu:   * Both Cardholder and Spouse displays in the drop-down menu. * If neither the CardHolder/Spouse are in the order, address defaults to the member in session (member displayed within the **Member Details** panel) if they are the Cardholder/Spouse. Otherwise address defaults to the Cardholder. |
| **6** | Verify the **Current Shipping Address** or **Current** **Payment Method** displayed (last 4 digits) on the order, **before** updating the address or payment method.   * If the address or payment method is correct, no future action is needed. * If the address or payment method is incorrect, select the preferred address and/or payment from the **New Shipping Address** or **New Payment Method** drop-down menu(s). Proceed to the next step. * To cancel any updates, click **Reset**.   **Notes:**   * The **New Shipping Address** field populates the address of the member whose settings are currently being used. * Use the related drop-down arrow to view the plan member’s available Shipping Options, Shipping Addresses, and Payment Methods. If address or payment method is not listed, click the related **Add/Update** button. For assistance, refer to [Compass - Add / Edit / Delete Mailing Address (053255)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9cfb4422-7129-4bca-b1ea-f1d6fa964906) or [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). * If shipping needs waived on an order, refer to [Compass - Waiving Shipping Fees or Crediting Shipping (073541)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4884979f-78c9-4dbe-9d11-2921104432cb).     **Example:**  John Doe (the card holder) calls to update address on Jane Doe’s order (both are adults, and Jane is his adult daughter), but the member in session is John Doe, the **Use Settings For** drop-down menu will default to John Doe’s address, unless the agent updates the member in session (from View Related Members hyperlink) to reflect Jane Doe’s preferred address. | |
| **7** | Review the updated **Shipping Address** and/or **Payment Method** with the member, to verify that the updated address and/or payment are correct, then click **Save**.   * To cancel any updates, click **Reset**. * Verify the **Email Address** and **Phone Number** on file for the member and make sure that the Mail Order Alerts are set up properly. If there is No Email and/or Phone number, obtain one from member and set Mail Order Alert preferences. Refer to [Compass - Add / Edit / Delete Phone Number (053256 (053256)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c37d4289-63b2-4732-a35c-c411cc26a29c)) and [Compass - Add / Edit / Delete Email Address (053409).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e01087c4-421c-4330-bcb3-81cb8cb45762) | |

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| Expedite Order in Process |

 Any order with upgraded shipping will automatically be expedited once it reaches the pharmacy.

 Shipped orders **cannot be expedited**.

 When an order contains a cold pack drug, Compass will disable the option to upgrade shipping to prevent member from being charged for expedited shipping (as orders with cold pack drugs are automatically expedited).

 When an order is marked for expedited processing, our pharmacy will make an attempt to move the order to the front of the processing queue. Continue to quote standard TAT for order processing. Refer to [Compass – Order Shipping Turn Around Time (TAT) (062824)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=31ee69db-e3d5-4717-b336-23ca51f1191e) or [Compass – Expediting a Mail Order in Process and Upgrading Order Shipping (056372)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=7c997e99-e6b0-43d8-9078-7bbe0ec848cf).

Users will have an indicator on screen to show which medications require a cold pack. In addition to the indicator, there will be a legend and help text on shipping. The screen will also provide a hyperlink to the work instruction on cold packed shipping in theSource. ​

To expedite an order in process, follow the steps below:

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| **Step** | **Action** |
| **1** | Determine if the member is low or out of medication. Refer to Client Program Offerings in the **Quick Action** panel on the Claims Landing Page for additional information and options.  **Expedited Processing Verbiage:**  This request will be sent to our pharmacy to attempt to expedite the processing only however this does NOT apply to your receive date. We are not able to expedite the shipping time it takes after it leaves our facility for you to receive it **unless** you select to upgrade your shipping. If you would like, I can provide you with those additional shipping options. |
| **2** | Ask the member if they would like to upgrade the shipping method.   * If yes, refer to the [Scenario Guide](#_Scenario_Guide) for the process to complete this request. * If no, proceed to the next step. |
| **3** | Navigate to the Claims Landing Pageand click the **Mail Order History** tab.  **Result:** All Mail Orders display. |
| **4** | Once the order is located, click the **Order Number** hyperlink.  **Result:** The Order Details screen displays. |
| **5** | a. From the **Order Actions** drop-down menu, select **Expedite**.    **Notes:**   * **Support Tasks** optionson the **Order Details** screenshould not be used at this time. * To discontinue an Rx, refer to [Compass - Discontinuing a Prescription (Rx) in Order Details (056370)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a0396fd5-8224-4c89-b673-49071e64cab1). * To cancel the Order, refer to [Compass - Cancel or Remove a Prescription (Rx) from an Order (056363)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9c43c276-a6a4-4481-880d-62b194600f02).   When order is expedited successfully, a message displays “Order <Order Number> has been expedited.”    b. Provide the Turnaround Time for when the order is expected to ship using the shipping method chosen as well as associated fees.   * Refer to [Compass - Shipping Guidelines and Fees (053427)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e77f513c-0e5e-4aaa-b674-de935ed25901) for additional shipping information, associated fees, and cold pack shipping.   When an order contains a cold pack drug, Compass will disable the option to upgrade shipping to prevent member from being charged for expedited shipping (as orders with cold pack drugs are automatically expedited). Users will have an indicator on screen to show which medications require a cold pack. In addition to the indicator, there will be a legend and help text on shipping, and the screen will provide a hyperlink to the work instruction on cold packed shipping in theSource. ​ |

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| Scenario Guide |

**Payment Changes Notes:**

* POAs are authorized to act on behalf of the member and can apply payments to an exclusive account.
* If the call is fully authenticated for a minor dependent and the caller can verify the payment account information, continue with applying the payment to the exclusive account.

**Address Changes Notes:**

* When receiving calls from the member requesting an address change for an Open Order, follow the process below.
* The process for changing an address on an Open Order differs from a Permanent Address Change process. To update a Permanent Address, refer to [Compass - Add / Edit / Delete Mailing Address (053255)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=9cfb4422-7129-4bca-b1ea-f1d6fa964906).

Refer to the Order Status scenarios listed below as needed:

* [Unable to view or locate order 1](#_Toc201234182)
* [Unable to see Order Details when all Rx’s on the order are voided 1](#_Toc201234183)
* [Orders that were recently placed 1](#_Toc201234184)
* [Caller requests changes to the Shipping Address, Shipping Method, or Payment Method be changed for Rx(s) in dispensing 1](#_Toc201234185)
* [Change Shipping Options, Address, or Payment Method on open order 1](#_Toc201234186)
* [Member asks if previous credit on the account has been applied to order 1](#_Toc201234187)
* [Order was delivered or member did not receive the prescription in more than 10 days from the shipment date 1](#_Toc201234188)
* [Order has shipped but delivery has been delayed due to weather 1](#_Toc201234189)
* [Order Placed on Hold due to Out of Stock or Backorder issue 1](#_Toc201234190)
* [Member is attempting to fill 30-day supply at mail order for controlled C2 medication and plan has a minimum of 31-day supply or more at mail order. 1](#_Toc201234191)

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| **Scenario** | **Action** | |
| Unable to view or locate order | Verify with the member that they do not have any additional active accounts or any recent name changes.  New Prescription details will not show immediately.  **Notes:**   * Clicking the chevron arrow next to the Order Number will expand/collapse a preview of the prescriptions in the order. * When a prescription has been sent in by the prescriber, but it is not yet fully adjudicated, it will not show in the member’s mail order history tab. Instead, a message will show at the top of the claims tab that says “There are orders awaiting pharmacy translation. View by Family to display." Selecting **Family** from the **View by Member or Family** drop-downwill display a message for New Rx’s awaiting pharmacy translation. * If the order cannot be located,review **Mail Order History** or **Alerts** to see if FastStart assisted. For assistance, refer to [Compass - Viewing, Adding, and Editing Alerts (054194)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=36c941d2-25a6-4075-993d-f12deb31be18) and [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). * Orders placed via the IVR (Telephone Voice Response), Customer Care, or Caremark.com will be available for editing for a short period of time (within 1 to 15 minutes) via the **In Process Orders** screen. Then, it will be displayed on the **Order Details** screen and begins processing. Refer to the [Orders that were recently placed](#OrdersRecentlyPlaced) section below as needed. * Compass has the option to expand each order. | |
| Unable to see Order Details when all Rx’s on the order are voided | When all Rx’s on an order are voided, there is no valid Rx information for Compass to retrieve. The following message is received when clicking the **Order Number** hyperlink and opening the Order Details screen:     * Click the **Alerts** hyperlink to display the **Alerts/Notes** tab and review any additional information available. | |
| Orders that were recently placed | Orders that were recently placed will not immediately show.   * Inform the member orders placed in the IVR (Interactive Voice Response), Customer Care, or Caremark.com will be available for editing for a short period of time (within 1 to 15 minutes) via the **In Process Orders** screen. Refer to the [Unable to view or locate the order](#UnableToViewLocateOrder) section above as needed. For assistance editing or cancelling in process orders, refer to [Compass - Editing and Cancelling In Process Orders (057232)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=98a7a9d6-b7fc-4471-9168-f6e3c3d2a14a). * Once the order is showing online, the member will be able to **Cancel**, **Edit**, or **Update**. | |
| Caller requests changes to the Shipping Address, Shipping Method, or Payment Method be changed for Rx(s) in dispensing | From the Order Details screen, review the **Rx Status Description** field by clicking the chevron next to the member’s name to expand the Rx Details.   * If the **Rx Status Description** states, “We are dispensing your prescription,” **DO NOT** change the address on the order. Refer to [Compass – Stop Tote Request (057999)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a4299650-04b0-46ee-b152-84f81ee81658) to update the order.   **Reminder:** Not all callers may request an address change, 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). | |
| Change Shipping Options, Address, or Payment Method on open order | From the **Mail Order History** tab, determine the **Status** of the order. The order must be in **Received** or **Processing** status.  **Note:** Click the chevron arrow next to the **Order Number** link to expand/collapse a preview of the prescriptions in the order.  **Reminder:** Not all callers may request an address change, 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).   * Once the order is located, click the **Order Number** hyperlink.   **Result:** The Order Details screen displays.     * Verify/Update the **Shipping Options** field with the shipping method the member would like to use. Educate on Fees and Turnaround Times as needed. For assistance, refer to [Compass - Shipping Guidelines and Fees (053427)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=e77f513c-0e5e-4aaa-b674-de935ed25901). * Verify full **Shipping Address** and/or **Payment Method** (last 4 digits) the member would like to update on the order, then click **Save**.   **Note:** To cancel any updates, click **Reset**.  **Note:** Use the related drop-down arrow to view the plan member’s available Shipping Options, Shipping Addresses, and Payment Methods. If address or payment method is not listed, click the related **Add/Update** button. For assistance, refer to [Compass - Add / Edit / Delete Mailing Address (053255)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9cfb4422-7129-4bca-b1ea-f1d6fa964906) or [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). | |
| **If...** | **Then...** |
| Order is placed on hold due to the Dupe Rx On Hold and the member needs medication refilled early | Create an offline refill task and note that this medication has been placed on Duplicate Rx Reconciliation hold.  Otherwise, the Rx can be refilled on the due date. Check the CMP alert for available fill date if not located in order comments.  If a Rx has been placed on indefinite hold and the Order Status is “Dupe Rx on Hold- this is due to the Duplicate Rx Reconciliation process. The medication will continue to be rejected when refilled in Compass if it is more than 7 days from the refill due date. |
| Attempting to apply a partial balance to an FSA card | Complete a Split Payment as an option for the member. 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). |
| A check was applied to the order | Advise the member if it is not enough to cover the cost of the order, they may receive a call for payment, or a bill will be shipped with the order. |
| Member asks if previous credit on the account has been applied to order | From the Claims Landing Page **Quick Actions** panel, click the **Current Balance** hyperlink. Refer to [Compass – Mail Order Payment History Screen (053927)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9a66303e-62a1-4cb5-817c-ad14e91b0bc2). | |
| Order was delivered or member did not receive the prescription in more than 10 days from the shipment date | Refer to [Compass - Order Reships (057985)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a6851523-18b2-4009-90a5-8fd53ee9669b). | |
| Order has shipped but delivery has been delayed due to weather | Refer to [Compass - Disaster / State of Emergency Process (065969)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=b83eb4f0-7e62-4a71-9f34-7eb1ebdbe231). | |
| Order Placed on Hold due to Out of Stock or Backorder issue | Refer to [Compass – Member Unable to Locate Medication at Mail Order or Retail (Back Order, Shortage, Not in Stock – NIS) (065451)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=47f1fc7c-d771-45ae-9de3-179ac312f222). | |
| Member is attempting to fill 30-day supply at mail order for controlled C2 medication and plan has a minimum of 31-day supply or more at mail order. | Refer to [Compass - Controlled Substance Information (C2-C5) (062851)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=43924b4f-9576-4024-93db-2b594c89bb00). | |

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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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