**Compass - Offline Refill**

[Reasons Not to Submit an Offline Refill](#_Toc204053266)

[Offline Refill Request via Refill/Renewal Button](#_Toc204053267)

[Offline Refill Using the Create Support Task Button](#_Toc204053268)

[Turn Around Time](#_Toc204053269)

[Troubleshooting](#_Toc204053270)

[Related Documents](#_Toc204053271)

**Description:** Procedural steps when the CCR is unable to fill a prescription through the **Refill Rx** tab. Offline Refill is formerly known as Manual Refill Request.

**Note:** To place a refill order in Compass, refer to [Compass - Mail Rx Refill/Renewal (Order Placement) (054262)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=ad3a7263-725b-4d5d-a2ec-440f1f30d79c).

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| **Reasons Not to Submit an Offline Refill** |

Refer to the table below:

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| **Reasons Not to Submit an Offline Refill** | **Action** |
| **Do not send** an Offline Refill Support Task for a member who is requesting the order to be sent without payment.  **Example:** The member does not want to put a method of payment on file because the member prefers to pay the balance after the order has been received.  **Note:** If the member has Fill and Bill an invoice can be sent with the order. Please refer to the CIF for additional information. | * If the member is unable to provide a method of payment, you may instruct the member to utilize a Mail Order form and send the payment with a personal check or money order addressed to the payment address. Refer to [Home Delivery Order Form Frequently Asked Questions and Sample (027162)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=bfbf4fbb-a1ba-4967-a7b8-6162be99ff11).      * If the member is escalated, submit a support task to have an offline refill request (and a bill will then be sent to the member). Inform member there is no guarantee it will be approved.   Provide the following address to mail the payment:  <Name of Mail Order Pharmacy>  P.O. Box 659539  San Antonio, TX 78265-9539  **Note:** Review of the CIF to determine the name of the members’ Mail Order Pharmacy. If the CIF does not specify, provide CVS/Caremark as the name of the Mail Order Pharmacy. Refer to [Compass - Payment Fill and Bill (025493)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0d911c06-a035-4993-b59a-c848a7d96831). |
| **Do Not Use** for requesting a new prescription from a new provider or for increased or decreased dosage.  **Examples:**   * The member’s provider has changed. * The member takes the same medication, but the dosage has increased or decreased. | 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) for options for obtaining a new prescription. If the provider is unable to receive a fax, advise the member to have the provider call in the prescription directly to [FastStart (004378)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f22eb77e-4033-4ad9-9afb-fc262f29faad). |
| **Do Not Use** when requesting to reduce the day supply of a prescription. | Refer to [Compass - Courtesy Retranslation (Bulk Up, Downsizing a Rx, Variable Fill) (058179)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=a11f9225-37ee-4af0-83bf-7d492b2006cf). |
| **Do Not Use** for mailed in Rx’s that have been returned to member. | 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). |
| **Do Not Use** when order is in processing. | Refer to [Compass - Support Task Types and Uses (056365)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4ac2747d-17b4-4986-8c4e-3bdaca477cf1). |
| **Do Not Use** this task if member wants the order put on hold. | Refer to [Compass - Placing a Prescription (Rx) in Process on Hold/From Hold (056362)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=46478c4b-48ae-4502-b66c-222e1ca37ce3). |
| **Do Not Use** this task for restarting discontinued controlled (C2-C5) medication. | A new Rx would be needed. 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). |
| **Do Not use** for Rx(s) that are expired or out of refills. | 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). |
| **Do Not use** for RX’s that have been discontinued by the prescriber. | Advise the member that we are only able to send a NewRx Request to the provider, and for any questions as to why the prescription was discontinued, they will need to reach out to their prescriber. 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). |

[Top of the Document](#_top)

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| **Offline Refill Request via Refill/Renewal Button** |

Refer to the table below:

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| **Reason for Manual Refill** | **Action** |
| System Error on Refill Screen | Use System error on Refill Screen when the system will not allow submission of a refill. Submit an Offline Refill Request via the **Refill/Renewal** button.  Compass is intuitive, do not try to bypass a warning unless you are advised by the work instruction. |
| Fill and Bill Payment Option is Missing | The Fill and Bill payment option is client specific. If the plan **allows**, submit an Offline Refill Request via the **Refill/Renewal** button. Review the plan’s CIF to make sure that the client is eligible for Fill and Bill.  Do not use this option if the CIF does not specify Fill and Bill is allowed. If this option is used and the member’s client does not subscribe to Fill and Bill, choosing this option will delay the member’s order.   * If the member is unable to provide a method of payment, you may instruct the member to utilize a Mail Order form and send the payment with a personal check or money order addressed to the payment address. Refer to [[Home Delivery Order Form Frequently Asked Questions and Sample (027162)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bfbf4fbb-a1ba-4967-a7b8-6162be99ff11).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bfbf4fbb-a1ba-4967-a7b8-6162be99ff11) * If the member is escalated, submit a support task to have an offline refill request (and a bill will then be sent to the member). Inform member there is no guarantee it will be approved.   Provide the following address to mail the payment:  <Name of Mail Order Pharmacy>  P.O. Box 659539  San Antonio, TX 78265-9539  **Notes:**   * Review the CIF to determine the name of the member’s Mail Order Pharmacy. If the CIF does not specify, provide CVS/Caremark as the name of the Mail Order Pharmacy. * View the Mail Order Payments tab located on the Member Snapshot Landing Page to make sure that the client is Fill and Bill. If the client is Fill and Bill, there will be a Yes displayed under the Eligible column, and this task can be used. |
| Diabetic Bundling Kit | The Diabetic Bundling option is client specific. Review the plan’s CIF to make sure that the client is eligible Diabetic Bundling. If the plan allows, submit an Offline Refill Request via the Refill/Renewal button and list the insulin first. Notate that the insulin must process first due to diabetic bundling and that the orders must be shipped together. |

Perform the steps below:

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| **Step** | **Action** |
| **1** | From the Claims Landing page, click the **Mail Rx** tab.  **Result:** Mail Rx screen displays.  A screenshot of a computer  AI-generated content may be incorrect. |
| **2** | Follow the Refill Rx workflow to proceed to the Refill Rx- Verify Screen. Refer to [Compass - Mail Rx Refill/Renewal (Order Placement) (054262)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad3a7263-725b-4d5d-a2ec-440f1f30d79c) as needed.  A screenshot of a computer  AI-generated content may be incorrect. |
| **3** | Confirm there is either a System Error on Refill Screen when placing the refill, or when trying to select the Fill and Bill payment option and it is missing from the **Payment Method** dropdown on the Refill Rx-Verify screen, or if Diabetic Bundling is needed and allowed by the client. |
| **4** | From the Refill Rx-Verify screen, select the **Offline Refill Required** checkbox at the bottom left and then choose the appropriate reason from the **Select an Option** dropdown:   * System Error on Refill Screen * Fill & Bill Payment Option is Missing * Diabetic Bundling Kit   A screenshot of a computer  AI-generated content may be incorrect.  **Result:** Submit Support Task button illuminates. |
| **5** | Click the **Submit Support Task** button.  A blue and white box with red text  AI-generated content may be incorrect.  **Result:** Offline Refill Support Task confirmation window displays. |
| **6** | **Click:**   * **No:** To return to the Refill Rx-Verify Screen.   **or**   * **Yes:** To submit the Offline Refill Support Task.   A screenshot of a computer error message  AI-generated content may be incorrect.    **Result:** Refill Rx - Offline Refill Support Task Submitted Screen displays and the following message displays at the top of the screen: “Offline Refill Support Task was created.” |
| **7** | From the Refill Rx - Offline Refill Support Task Submitted screen, read the displayed disclaimer to the member. Click the **Close** button to return to the Mail Rx screen.  **Note:** Disclaimer verbiage will vary depending on if RX has refills remaining, no refills remaining, or is expired.  A screenshot of a computer  AI-generated content may be incorrect. |

[Top of the Document](#_top)

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| **Offline Refill Using the Create Support Task Button** |

 If the member is low on medication, document it in the task notes.

**Note:** From the Case Data section that displays on all Compass screens, click the **Create Support Task** button.

Take the following actions when creating an Offline Refill Support Task

* **Task Type:** Refills Request- Offline Refills
* **Reason:** System Error on Refill Screen
* Include Rx number(s) and Rx name(s)in the Drug Names field.
* Document the reason for the Offline Refill in the task notes.

Refer to [Compass - Create a Support Task (050031)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6) as needed.

 **Do Not** enter the payment information in the notes of theSupport Taskwhen creating an **Offline Refill** using the **Create Support Task** button, add the payment in the Support Task after it has been submitted.For information on canceling or editing the support task once submitted, refer to [[Compass - Edit or Cancel a Self-Submitted Support Task (050032)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4ad65197-fe9e-4288-b5e3-23c771eff267)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4ad65197-fe9e-4288-b5e3-23c771eff267).

Refer to the table below:

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| **Reason for Offline Refill** | **Action** |
| Rx refill is on reject/RTP but has available refill that is not showing on the refill screen (restart order). This would include prescriptions that are phoned, faxed, or sent in electronically by the doctor, as well as paper prescriptions that have not been returned. Our pharmacy will restart the prescription. | Submit an Offline Refill Request using the **Create Support Task** button.   * **Type:** Refills Request- Offline Refills * **Reason:** Rx Discontinued in Error |
| Offline Refill is required, but the member would like to use more than one method of payment.  Do not submit a Split Payment Support Task. | Submit an Offline Refill Request using the **Create Support Task** button.   * Include in task notes: (copy and paste)   + Payment Method #1: <Last 4 digits of credit/debit card or e-check>   **#1** - <Payment Amount>   * + Payment Method #2: <Last 4 digits of credit/debit card or e-check>   **#2** - <Payment Amount>    Do not list full credit card or account numbers. |
| Valid Discontinued Rx, which was transferred from another Compass account, which is still valid and cannot be found in current account. Must be verified in original account. | Submit an Offline Refill Request using the **Create Support Task** button.  Include in task notes: Previous Member ID |
| Valid prescription discontinued in error. | Submit an Offline Refill Request using the **Create Support Task** button. |
| International Address | Mail Service ships orders to Canada; however, the address will need to be input by the pharmacy.  Inform the member that they are responsible for completing any paperwork required by Customs to allow the order to be shipped into their country.  Submit an Offline Refill Request using the **Create Support Task** button.   * Include International Address in the Shipping Address field.   A screenshot of a computer  AI-generated content may be incorrect.  Refer to [Compass - Add / Edit / Delete Mailing Address (053255)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9cfb4422-7129-4bca-b1ea-f1d6fa964906). |
| Diabetic Bundling | When processing an Offline Refill from the Create Support Task button, Choose Diabetic Bundling Kit for the Reason field.  The user should include Rx number(s) and Rx name(s) in the Drug Names field and document the reason for the Offline Refill (Diabetic Bundling Kit) in the task Notes. List the insulin first. Notate that the insulin must process first due to diabetic bundling and that the orders must be shipped together. |
| 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 an amount due; payment is required at the time an order is placed. Refer to [Compass - Mail Rx Refill/Renewal (Order Placement) (054262)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad3a7263-725b-4d5d-a2ec-440f1f30d79c).  **Note:** If the member is escalated, submit a support task to have an offline refill request (and a bill will then be sent to the member). Inform member there is no guarantee it will be approved. |

[Top of the Document](#_top)

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| **Turn Around Time** |

Up to 2 (two) business days.

**Note:** Issues, such as a need to contact the provider, may increase the TAT.

[Top of the Document](#_top)

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| **Troubleshooting** |

Use as needed:

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| **If the prescription…** | **Then…** |
| Is a C2 Controlled Substance medication | Refer to [Compass - Controlled Substance State Laws (058033)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=76fe19d9-b159-43a4-9db5-077ba1f6a958). If the Rx is expired, refer the member to their prescriber to obtain a new prescription. |
| Is a C3-C5 Controlled Substance medication | Refer to [Compass - Controlled Substance State Laws (058033)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=76fe19d9-b159-43a4-9db5-077ba1f6a958). From the Claims Landing page, click the **Mail Rx** tab. Search for the prescription number via the Mail Rx tab screen and place order.   * If not allowed, refer the member to their prescriber to obtain a new prescription. |
| Expired or has no refills remaining | From the Claims Landing Page, click the **Mail Rx** tab. Search for the prescription number via the Mail Rx tab screen and place order. Refer to [Compass - Mail Rx Refill/Renewal (Order Placement) (054262)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad3a7263-725b-4d5d-a2ec-440f1f30d79c). |
| Has been discontinued and the request is urgent | Contact the Senior Team. |

[Top of the Document](#_top)

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| **Related Documents** |

[Customer Care Abbreviations, Definitions, and Terms Index (017428)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=c1f1028b-e42c-4b4f-a4cf-cc0b42c91606)

[Compass - Mail Rx Refill/Renewal (Order Placement) (054262)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=ad3a7263-725b-4d5d-a2ec-440f1f30d79c)

[Compass - Discontinuing a Prescription (Rx) in Order Details (056370)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=a0396fd5-8224-4c89-b673-49071e64cab1)

[Compass - Placing a Prescription (Rx) in Process on Hold/From Hold (056362)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=46478c4b-48ae-4502-b66c-222e1ca37ce3)

**Parent Document:** [CALL 0049 Customer Care Internal and External Call Handling](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0049)

[Top of the Document](#_top)

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