# Compass - Editing and Cancelling Orders Awaiting an Order Number

[Reminders](#_Toc205292200)

[Editing Orders Awaiting an Order Number](#_Toc205292201)

[Canceling Orders Awaiting an Order Number](#_Toc205292202)

[Scenario Guide](#_Toc205292203)

[Related Documents](#_Toc205292204)

**Description:** Process to edit or cancel Mail Orders that are Awaiting an Order Number.

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| Reminders |

Orders Awaiting an Order Number are pending orders placed within 15 minutes that are awaiting entry into the Mail Order Pharmacy and that have not yet been adjudicated (**Example:** Not yet processed through the member’s insurance). They are not located on the **Mail Order History** tab, but can be viewed by clicking the **(Not seeing an order?)** **Access list of orders awaiting an Order Number** hyperlink.

 Only the Member, Legally Documented Representative (**POA**), or Prescribing Physician may cancel an order or prescription that is in process.

 Determine if the member needs the entire order cancelled, or just specific prescriptions within the order cancelled. To cancel a specific prescription (**Rx**), refer to [Compass - Cancel or Remove a Prescription (Rx) from an Order (056363)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=9c43c276-a6a4-4481-880d-62b194600f02).

 Do not confuse **canceling** a prescription within an order with **discontinuing** 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).

* Bridge Supply orders **CANNOT** be cancelled.
* Written Rx’s and fax requests will not be sent back to the member when the order is cancelled. They are not re-routed; however, they can be restarted if the new Rx has not expired by creating a Support Task, **Task Type:** Offline Refill. 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.
* Canceling an order that contains an Rx enrolled into any part of the Auto Refill Program (**ARP**) removes the Rx from ARP.
* Cancel an Rx refill only if the member does not want to have the Rx filled through Mail 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).

[Top of the Document](#_top)

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| Editing Orders Awaiting an Order Number |

Complete the steps below:

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| **Step** | **Action** | |
| **1** | From the Claims Landing Page,click the **Mail Order History** tab. | |
| **2** | Ensure the authenticated member’s name is selected in the **View by Member or Family** drop-down box. | |
| **3** | Click the **Access list of orders awaiting an Order Number** hyperlink in the top-right corner.    **Result:** The In Process Order screen will display. This screen includes any orders placed within a 1-to-15-minute time frame. | |
| **4** | Review the orders on the In Process Orders screen by clicking the chevron arrow   next to each **Confirmation number** to collapse and expand a preview of the order. | |
| **5** | Click the **Row Level Action** drop-down arrow for the appropriate order and select **Edit**.  **Notes:**   * For Order(s) Not Yet Showing in Compass, refer to the [Scenario Guide](#_Scenario_Guide). * If the Edit or Cancel buttons are grayed out and the order is not visible in [Mail Order History (056369)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0ad0ab77-cb2e-4521-8f97-659304a0c8f8), refer to the '**Order Not Yet Showing in Compass**' section of the [Scenario Guide](#_Scenario_Guide) for next steps.     **Result:** The **Edit In-Process Order** tab displays. | |
| **6** | Assist the member with editing the order as needed. **From this tab, you can:**   * Add/Remove Rx(s) included in the order * Update the shipping address * Update the phone number * Update the method of payment for the order   **Note:** For assistance, refer to the [Scenario Guide](#_Scenario_Guide). | |
| **7** | Confirm that the member has more than a 5 days’ supply of each medication on hand. | |
| **If the member…** | **Then…** |
| Has 5+ days’ supply of all medication(s) on hand for all medications | Click the **Select All** checkbox, then click **Add Rxs** and proceed to the next Step.  **Result:** After clicking **Add Rxs**, the Edit-In Process Order screen displays. |
| Does not have 5+ days’ supply of all medication(s) on hand | * Select the checkboxes that correspond to the medications that the member has 5+ days supply of on hand, then click **Add Rxs**.   Do NOT select checkboxes for medication(s) for which the member has a 5 days’ supply or less.  **Result:** A dialog box appears with the different options the member has to obtain their medication, including upgraded shipping. Additional information displayed is based on the member’s plan offerings.     * Educate the member based on their options and then proceed depending on how the member wants to proceed.   + If the member understands their options and wants to continue editing the order, click **Add Rxs** and proceed to the next Step.   **Result:** After clicking **Add Rxs**, the Edit In-Process Orders screen displays.   * + If the member does not want to continue editing the order:     - Click **Cancel,** to exit editing the order.     - Click **Previous** to return to the **Edit In-Process Orders** screen.   **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** | Review and confirm the order information with the member including Rx(s), shipping options, shipping address, phone number, and method of payment, then click **Save Changes**.  **Note:** If waived shipping has been selected, it will not be visible on the induction order and the ability to add waived shipping will not be available.    If the shipping address, phone number, or payment method was changed, click the **Refresh for Updates** button **prior** to clicking **Save Changes**.  **Notes:**   * If the member needs to add more medications to the order, click the **Add Rxs** button and return to **Step 6**. * The system will add any drugs selected to the order and automatically run a test claim (the **Rerun Test Claims** button can be used if needed). * To exit Editing the Order, click **Cancel.**     **Result:** The Refill Rx – Complete screen displays. | |
| **9** | Provide the turnaround time (**TAT**) 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. You can expect your order to be shipped from our pharmacy within five business days once it is received, provided your provider responds to our request. Orders are shipped on the first business day once processing has been completed.   * If the Rx has **refills remaining** **and is not expired:**   You can expect your order for the following prescriptions to ship from our pharmacy within two business days after the order is placed. (Monday thru Friday are considered business days, although mail order is open every day). Orders are shipped on the first business day available upon processing being completed. | |

[Top of the Document](#_top)

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| Canceling Orders Awaiting an Order Number |

 Clicking **Cancel** will cancel the entire order. If specific prescriptions within the order need to be cancelled, 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).

Complete the steps below:

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| **Step** | **Action** |
| **1** | From the Claims Landing Pageclick the **Mail Order History** tab. |
| **2** | Ensure the authenticated member’s name is selected in the **View by Member or Family** drop-down box. |
| **3** | Click the **Access list of orders awaiting an Order Number** hyperlink in the top-right corner.    **Result:** The In Process Order screen will display. This screen includes any orders placed within a 1-to-15-minute time frame. |
| **4** | Review the orders on the In Process Orders screen by clicking the chevron arrow   next to each **Confirmation number** to collapse and expand a preview of the order |
| **5** | Click the **Row Level Action** drop-down arrow for the appropriate order and select **Cancel**.  **Notes:**   * For Order(s) Not Yet Showing in Compass, refer to the [Scenario Guide](#_Scenario_Guide). * If the Edit or Cancel buttons are grayed out and the order is not visible in [Mail Order History (056369)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0ad0ab77-cb2e-4521-8f97-659304a0c8f8), refer to the '**Order Not Yet Showing in Compass**' section of the [Scenario Guide](#_Scenario_Guide) for next steps.     **Result:** The Cancel Order pop-up will display. |
| **6** | Click **Yes**.  Clicking Cancel will cancel the entire order. If specific prescriptions within the order need to be cancelled, 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).   * To exit canceling the order, click **No**.     **Result:** Pending Order Canceled successfully. |

[Top of the Document](#_top)

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| Scenario Guide |

Refer to the following scenarios as needed:

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| **Scenario** | **Action** |
| **Adding** **Rx’s to the Order** | * Click the **Add Rxs** button.     **Result:** Select Prescriptions pop up displays.   * Search for the Prescription(s) the member wants added to the order, then click **Next**.   **Current PBM Rxs View**    **Notes:**   * Only checked Rx(s) will be added to the order. * Deselecting a checkbox from the list will prevent the Rx from being added to the order. * Agent can navigate from **Current PBM Rxs** to **Prior PBM Rxs** if needed. * To exit the Select Prescrptions pop up without adding Additional Rxs to the order, click **Cancel.**   **Result:** TheVerify Supply on Hand pop-up willdisplay,continue to [Step 7](#EditingInProcessOrdersStep7) of [Editing Orders](#_Editing_In_Process) Awaiting an Order Number. |
| **Removing Rx’s from the Order** | To remove Rx(s) from the order, select **Remove** from the row level action menu of the prescription needing to be removed.  **Result:** Prescription is removed from the order. |
| **Shipping Address/Phone Number or Payment Method needs to be updated** | An **Add/Update** button for **Addresses, Phone Numbers** and **Payment Method** will be provided to 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) * [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) |
| **Order Not Yet Showing in Compass** | Ask the member if the order was placed by using the **IVR** (Interactive Voice Response), Customer Care, or the website within the last 15 minutes.   * If the member calls to cancel an order that:   + Is not yet showing in Compass or   + The edit and cancel buttons are grayed out on the In Process Orders screen **AND** the order cannot be found in the [Mail Order History (056369)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0ad0ab77-cb2e-4521-8f97-659304a0c8f8).   Place a **Mail Alert** on the account listing the medication name, the strength, whether the member wants the prescription placed on hold or discontinued, and select the appropriate sub-category. Refer to [Compass - Viewing, Adding, and Editing Member and Mail Alerts (054194)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=36c941d2-25a6-4075-993d-f12deb31be18).  Adding a Mail Alert does **not guarantee** that the order will be cancelled. |
| **Pending Credit Card Charge for a Canceled Order** | Advise that we issue approved refunds within three business days. The Financial Institution (**Example:** Bank, HSA, etcetera) will release the funds back into the account according to their guidelines. Due to Financial Institutions internal processing times, members may see a delay in the refund.   * 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) |

[Top of the Document](#_top)

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| Related Documents |

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

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

[Compass - Cancel or Remove a Prescription (Rx) from an Order (056363)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9c43c276-a6a4-4481-880d-62b194600f02)

[Compass – Stop Tote Requests (057999)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a4299650-04b0-46ee-b152-84f81ee81658)

[Top of the Document](#_top)

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