# **Compass - Courtesy Retranslation Support Task (Bulk Up, Downsizing an Rx, and Variable Fill Requests)**

[Bulk Up Request](#_Toc203462495)

[Downsizing a Prescription Request](#_Toc203462496)

[Variable Fill Request](#_Toc203462497)

[Scenario Guide](#_Toc203462498)

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**Description:** Procedures and parameters of when and how to submit a Courtesy Retranslation Support Task for Bulk Up, Downsizing a Prescription, and Variable Fill requests.

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| **Bulk Up Request** |

Caremark allows a courtesy Bulk Up request for members when the member expresses that they were expecting a **90**-day supply (90 DS) and the prescription(s) was written for a **30-**day supply (30 DS).

**Bulk Up is internal terminology and should not be used with callers.**

**Notes:**

* If the member is certain the prescription was written for a 90 DS, contact Clinical Care Services to review the prescription image for errors in translation.
* If provider is on the line, follow normal processes to transfer to the correct the department. (**Example:** FastStart, etc.)

**Turnaround time:** Educate the member on a turnaround time of 72 business hours for the request, not including standard processing and shipping time for the order.

**Client Participation**

Review the CIF (Client Information Form) **Client Specific Process** section to determine if Bulk Ups are allowed.

* For all non-Med D clients, if there is not a **Bulk Up** section, then a Bulk Up is allowed. If **BULK UP Yes** or there isn’t a Bulk Up section, then a bulk up is allowed.
* Med D CIF **would** need to state the Bulk Up is allowed.

**Prescription Requirements**

* The prescription was filled less than 45 days after the original order or the last ship date of the last filled order.
* Rx remains valid regardless of how many times it has been filled (not expired).
* Rx has enough refills remaining on the prescription to equal a 90-day supply.
* **The Prescription must be written for at least a 30-day supply of the correct quantity.**

**Notes:**

* The most common scenario is a 30-day supply with at least 2 refills (30 DS x 3 fills = 90 DS).
* A 45-day supply would be the max that could be submitted and need to have one (1) refill remaining (45 DS x 2 fills = 90 DS).
* A 60-day supply does not qualify for Bulk Up. A 60-day supply would exceed the 90-day maximum (60 DS × 2 fills = 120 DS).
* Days’ supply (refills) of **pre-packaged items** must be able to equal a 90-day supply or above.

**Exception:** Some pre-packaged and birth control may be 28 days – with an 84-day supply.

**Example:** A prescription of test strips is for a 25-day supply plus 2 refills (25 DS x 3 fills = 75 DS); it will NOT qualify for a Bulk Up. However, if the prescription has 3 refills (25 DS x 4 fills) it could be bulked up.

* **The prescription will NOT qualify for Bulk Up under the following circumstances:**
* Written for a 90-day supply but written for the wrong quantity.
* Previously reduced for quantity vs. time (QVT) or plan limits. If the member has Prior Authorization (PA) or override placed on file after the reduced prescription has shipped, refer to the [Variable Fill Request](#_Variable_Fill_Request) section to have the remaining quantity shipped.
* Verify if prescriber was already contacted for Bulk Up prior to dispensing. If so and the prescriber still only prescribed under a 90-day supply, Bulk Up is not allowed.
* A controlled medication, this includes all controlled substances, C2-C5.
* A discontinued prescription. Do Not discontinue the prescription when submitting a bulk up request. Once a prescription has been discontinued, it becomes inactive and cannot be reordered through the Mail Rx screen.
  + If the prescription is valid and discontinued in error, create a Support Task; Task Type: Refill Request-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)

Once the determination has been made that the prescription is eligible and can be submitted for Bulk Up, complete the following steps:

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| **Step** | **Action** |
| **1** | From the **Claims Landing** page, click the Mail Order History tab. |
| **2** | Determine the name of the prescription(s) the caller is inquiring about, then locate the order.    **Result:** Order Status and Prescription Status displays. |
| **3** | Once the order is located, Click the **Order Number**hyperlink.  **Note:** Click the chevron arrow next to the **Order Number**link to expand/collapse a preview of the prescriptions in the order.    **Result:** The Order Details Screen displays. |
| **4** | Click the chevron next to the member’s name to expand the prescription details of the order. |
| **5** | To start the Bulk Up Request, click the **Support Tasks** drop-down menu, and then select **Bulk Up**.  **Notes:**  **Bulk Up** can only be performed if the order status is Pending Carrier Pickup, Shipped, Delivered.  If Compass is not able to perform a Bulk Up, a red error message displays in the Order Details screen describing the reason the Bulk Up cannot be completed.   * When selecting bulk up if a Not Available at Mail or Not in Stock at Mail pop up displays, refer to the [Scenario Guide](#_Scenario_Guide) below. * If multiple medications within the order need a Bulk-up, each medication will require a Support Task for Bulk-up created separately.     **Result:** The Bulk-Up Courtesy Retranslation popup displays. |
| **6** | * 1. Click the checkbox to confirm the Rx has enough refills for at least an 84 or 90-day supply. * If the Rx is eligible; inform the caller:  We will contact your provider to make a request to consolidate your prescription to a 90-day supply. * If Rx is not eligible for Bulk Up, click **Cancel**, then 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 assist the member with obtaining a new Rx.     **Result:** Continue button illuminates. |
| **7** | * 1. Click **Continue** to access theCourtesy Retranslation Support Task screen.   2. Edit the Quantity and Days’ supply for which the member is requesting the Bulk up. * An edit would need to be made to make the Days’ Supply 90 and update the quantity to reflect the quantity needed for 90 days.   **Notes:**   * Quantity must be more than the original quantity dispensed. * To use the Quantity Calculator, click the appropriate **Row Level Action** drop-down arrow and select **Calculate Quantity**. * Compass may provide a rejection on some claims but will still provide appropriate pricing; proceed with Bulk Up. * Compass will show the following message when a Test Claim **cannot** be completed: “Test claims failed to run. **Try rerunning test claims**.” Refer to the [Scenario Guide](#_Scenario_Guide) for further information. |
| **8** | * + - 1. Click the **Rerun Test Claims** button.       2. Inform the caller: * I will run a price estimate, so you are aware of any changes in your co-payment amount. If there is any difference in cost on the medication you will be charged or credited the difference.   **Note:** 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](#_Scenario_Guide) for further information.    **MED D Only Notes:**   * 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.  **Result:** New Price displays on the Courtesy Retranslation Support Task screen; notify the member of cost differences.    **Notes:**   * Only the original provider can be contacted for the Bulk Up request to update the current prescription to a 90-day supply. * If the Test Claim rejects for refill too soon, perform a manual test claim for the next available refill date to confirm if there is a price difference between the 30-day supply and 90-day supply. Proceed with the bulk-up and quote any price difference. * If a pop-up message displays indicating the Test Claim failed, refer to the [Scenario Guide](#_Scenario_Guide).      * + - 1. Quote the caller the new Total Cost, then verify Shipping Options, Shipping Address, Phone Number, Payment Method. Update these selections as needed using the appropriate dropdowns and **Add/Update** buttons, then click **Submit Support Task**.     **Result:** Courtesy Retranslation Support Task Submitted popup displays. |
| **9** | 1. Educate the member on a turnaround time of 72 business hours for the Support Task, not including standard processing and shipping time for the order. 2. Click **Close** to exit the Courtesy Retranslation Support Task Submitted pop-up. 3. Suggest the member contact their doctor’s office and remind the office to ONLY respond to our fax request to update the prescription on file to 90 days and NOT fax in a new prescription.  * If the Prescriber responds to our Bulk Up request, the pharmacy uses one of the refills on the new 90-day prescription to dispense the remaining amount needed to fulfill the Bulk Up. The remaining refills on this prescription will dispense 90-day supplies. * If the Prescriber **does not respond** to our Bulk Up request and instead sends a new Rx, it will not bulk up the existing prescription. The member has the initial 30-day supply prescription and the new 90-day supply prescription on their account. |
| **10** | Determine if the caller has requested a call back:   * If **yes**, follow the procedure for [Compass - Create a Support Task (050031)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=64f18e5a-4d56-4175-ba8e-e7d094e501d6).  1. In the task notes, include whether it is the **member** or the **prescriber** requested a callback. 2. Suggest that the member registers online to monitor the status of their order. 3. Assist the caller with any other inquiries and end the call.  * If **no**, assist the caller with any other inquiries then end the call. |

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| **Downsizing a Prescription Request** |

Used when a member requests that their prescription be filled for less than the 90 calendar days’ supply rather than how it is currently written (such as for a one-time vacation override) or if a prescription is entered in for more than a 90 days’ supply and needs to be reduced to the amount the plan allows.

For a prescription to be downsized, it cannot be expired **and** there must be refills remaining.

**Notes:**

* Pre-packaged medications/supplies cannot be broken up to downsize the prescription. This includes pre-packaged items such as insulin, test strips, sprays, vials, blister packs, tubes, etcetera. Refer to [Compass - Test Claims (050041)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=60c20ea0-1d07-46e3-809a-b54734b80fbe) for instructions on running test claims for pre-packaged items.
* This only applies to downsizing the day supply for the prescription. If the quantity prescribed is wrong, a new prescription would be needed.
* If the member notifies you after they have placed the order and it is within 15 minutes, cancel the order via the Pending Induction screen using the **Cancel Order** button. 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).
* If the member notifies you after they have placed the order and it is on the Mail Order History screen, proceed depending on if it is a new prescription or a refill order:
* If it is a **new prescription**, wait until the prescription is back in the order placement screen, put the prescription in question on indefinite hold. Then submit the task outlined in the process section below.
* If it is **refill**, cancel the prescription or the entire order if it only contains one refill prescription. Then submit the task outlined in the process section below.

* Prescriptions for controlled medications cannot be altered.

Perform the following steps to submit a Downsizing Request:

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| **Step** | **Action** |
| **1** | Run a test claim to determine the cost and provide estimation to the member. Refer to [Compass - Test Claims (050041)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=60c20ea0-1d07-46e3-809a-b54734b80fbe).  **Note:** When running the test claim, if there is no change in cost, ask member if they would like to continue with the reduction in quantity. |
| **2** | From the **Mail Rx** tab, select the prescription the caller is requesting to be downsized and then click **Add to Selected Rx(s)**.    **Result:** Theprescription is added to the **Selected Rx(s)** section: |
| **3** | Click the **Refill/Renewal** button to continue.    **Result:** The Refill Rx – Supply on Hand screen displays. |
| **4** | Determine if the member has more than 5 days of the medication on hand:   * If No, click **Next** and educate on available Client Program Offerings. * If Yes, click the checkbox for the prescription, then click **Next** to continue.     **Result:** The Refill Rx – Auto-Refill/Auto-Renewal Enrollment screen displays. |
| **5** | Educate the member on the Auto Refill Program (ARP) as indicated on the screen.   * If the member has questions regarding Auto-Refill/Auto Renewal Enrollment, refer to [Compass - Auto Refill Program (ARP) (056033)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f843bc3f-55cc-4223-b2fc-03aff60cdf4c).   **Note:** If the member enrolls in ARP, we will reach out for a 90-day supply after downsizing the prescription.   * If the member wants to continue with the Downsizing Request, click **Next**.     **Result:** The Refill Rx – Verify screen displays. |
| **6** | To start the Downsizing Request, click the **Row Level Action** drop-down arrow, then click **Courtesy Retranslation**.    **Result:** The Courtesy Retranslation Type popup displays. |
| **7** | Click the **Select type of request** drop-down menu and select **Downsize**.    **Result:** When **Downsize** is selected, Compass displays **Occurrence** radio buttons with the options to downsize the Rx one time or for all remaining fills:   * If downsizing **one fill:**  1. Select the **One-Time radio** button. 2. Click **Continue** and proceed to the next step.   **Result:** Compass populates the following message in the task notes when the task is submitted: “Member is requesting a 1x downsizing of the Rx.”   * If downsizing all remaining fills:  1. Select the **All-Remaining Fills** on the Rx radio button. 2. Click **Continue** and proceed to the next step.   **Result:** Compass populates the following message in the task notes when the task is submitted: “Member is requesting that all remaining fills of Rx be downsized.”  **Notes:**   * If the prescription is a Packaged Medication, it must not be the smallest package size available. (**Example:** Package size is 15 and total quantity is 15). The system displays a message: Unable to downsize as already dispensing smallest quantity possible. * Click **Cancel** to exit the Downsizing Request. |
| **8** | On theCourtesy Retranslation Support Task screen, edit the Quantity and Days’ supply for which the member is requesting the downsize.  **Notes:**   * Quantity must be less than the original quantity dispensed. * To use the Quantity Calculator, click the appropriate **Row Level Action** drop-down arrow and select **Calculate Quantity**. * Compass will show the following message when a Test Claim **cannot** be completed: “Test claims failed to run. **Try rerunning test claims**.” Refer to the [Scenario Guide](#_Scenario_Guide) for further information. |
| **9** | Click the **Rerun Test Claims** button.  **Note:** 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](#_Scenario_Guide) for further information.    **MED D Only Notes:**   * 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.  **Result:** New Price displays on the Courtesy Retranslation Support Task screen. |
| **10** | Quote the caller the new Total Cost, then verify Shipping Options, Shipping Address, Phone Number, and Payment Method. Update these selections as needed using the appropriate dropdowns and **Add/Update** buttons, then click **Submit Support Task**.  **Notes:**   * If a pop-up message displays indicating the Test Claim failed, refer to the [Scenario Guide](#_Scenario_Guide). * If the member’s address is updated and a pop-up message displays Not in Stock / In Stock, refer to the [Scenario Guide](#_Scenario_Guide).     **Result:** TheCourtesy Retranslation Support Task Submitted popup displays: |
| **11** | Educate the member on a turnaround time of 72 business hours for the Support Task, not including standard processing and shipping time for the order.  **Note:** Click **Close** to exit the Courtesy Retranslation Support Task Submitted pop-up. |
| **12** | Once the downsizing of the prescription has been submitted, add a Mail Order Alert with Category “Special Instructions” and Sub-Category of Downsizing Rx. Refer to [Compass - Viewing, Adding, and Editing Alerts (054194)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=36c941d2-25a6-4075-993d-f12deb31be18).  The following fields will be available to fill in:   * Rx # * Rx Name * Days’ Supply the member is requesting * One-Time or All Remaining Refills * The alert will default to a 10-day expiration date |

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| **Variable Fill Request** |

When a member’s plan restricts the quantity of a medication, the member may be able to obtain a greater quantity via the Prior Authorization (PA) process. If the member received a Mail Order for a reduced quantity due to the plan limitation, they may be able to receive the remainder of the originally prescribed quantity if the PA is approved. This remainder shipment is called a Variable Fill.

**Example:** Plan allows for once-a-day dosing for a certain medication without a PA. The prescriber writes a prescription for twice-a-day dosing for a quantity of a 180 DS through the Mail Order pharmacy, but only the quantity of a 90 DS is shipped due to the limitation. The prescriber later requests a PA for the twice a day dosing, and the PA is approved and entered in the system. The member is eligible to receive a Variable Fill for the remaining quantity of a 90 DS.

Variable Fills are not to be confused with Bulk Up Requests. In Bulk Up situations, the prescriber wrote the prescription for the wrong days’ supply (**Example:** 30 DS instead of 90 DS). With a Variable Fill, the plan limitations are what restrict the quantity that can be dispensed. Refer to the [Bulk Up Request](#_Bulk_Up_Request) section above as needed.

**Notes:**

* Refer to the CIF and Benefits for details on whether a PA for quantity limits can be requested.
* Variable Fills cannot be done for Controlled Substances.
* Variable Fills can be requested within 90 days of the original ship date (120 days for New York residents).

The PA needs to be in effect on the day the request is submitted.



 In the event of a PA for Quantity Versus Time (QVT), the member needs to wait until the full-time limit to receive their full quantity **unless** the plan allows for a QVT Exception Plan Benefit Override.



Variable Fills are not permitted for Med D clients.



Perform the following steps to submit a Variable Fill Request:

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| **Step** | **Action** |
| **1** | From the Prescription Details screen, check the **Drug** tab to ensure that the reason the quantity was reduced is that the prescription required Prior Authorization (PA) as written and there was no PA on file at the time of dispensing.  **Example:** Plan allows quantity of 30, but prescription was written for 90 and reduced to 30.   * If **No**, determine if the prescription has enough refills to submit a Bulk Up Request. Refer to the [Bulk Up Request](#_Bulk_Up_Request) section above. * If **Yes**, proceed to the next step. |
| **2** | Review the Override/PA History screen for the member in question to ensure a PA has been entered.   * If **No**, determine if the PA is in progress or if the PA has been initiated and advise the caller of the status. Refer to the CIF for client PA process. * If **Yes**, proceed to the next step. |
| **3** | From the **Mail Rx** tab, select the prescription for which the caller is requesting a Variable Fill and then click **Add to Selected Rx(s)**.    **Result:** The prescription is added to Selected Rx(s) section. |
| **4** | Click the **Refill/Renewal** button to continue.    **Result:** The Refill Rx – Supply on Hand screen displays. |
| **5** | Determine if the member has 5 more than days of the medication on hand:   * If **No**, click **Next** and educate on available Client Program Offerings. * If **Yes**, click the checkbox for the prescription, and then click **Next** to continue.     **Result:** The Refill Rx – Auto-Refill/Auto-Renewal Enrollment screen displays. |
| **6** | Educate the member on the Auto Refill Program (ARP) as indicated on the screen.   * If the member has questions regarding Auto-Refill/Auto Renewal Enrollment, refer to [Compass - Auto Refill Program (ARP) (056033)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f843bc3f-55cc-4223-b2fc-03aff60cdf4c). * If the member wants to continue with the Variable Fill Request, click **Next**.     **Result:** The Refill Rx – Verify screen displays. |
| **7** | To start the Variable Fill Request, click the **Row Level Action** drop-down arrow, then click **Courtesy Retranslation**.    **Result:** The Courtesy Retranslation Type pop-up displays. |
| **8** | Click the **Select type of request** drop-down menu and select **Variable Fill**, then click **Continue**.    **Notes:**   * If Compass is not able to perform the Variable Fill, a message will appear in the Courtesy Retranslation Type popup describing the reason the Variable Fill cannot be completed. * To return to the previous screen, click **Cancel**. |
| **9** | On theCourtesy Retranslation Support Task screen, edit the Quantity and Days’ supply for which the member is requesting the Variable Fill.  **Notes:**   * To use the Quantity Calculator, click the appropriate **Row Level Action** drop-down arrow and select **Calculate Quantity**. * Compass will show the following message when a Test Claim **cannot** be completed: “Test claims failed to run. **Try rerunning test claims**.” Refer to the [Scenario Guide](#_Scenario_Guide) for further information. |
| **10** | Click the **Rerun Test Claims** button.  **Note:** Compass will show the following message when a Test Claim **cannot** be completed: “Test claims failed to run. **Try rerunning test claims**.” Refer to the [Scenario Guide](#_Scenario_Guide) for further information.    **MED D Only Notes:**   * 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.  **Result:** New Cost displays on the Courtesy Retranslation Support Task. |
| **11** | Quote the caller the cost difference (if any) between the original order (30 DS) and the Variable Fill request (90 DS).  **Example:** Cost of 30 DS is $99.67; cost of 90 DS is $299.67. Member would owe $200.00.   * If the member does not want to continue with the Variable Fill Request, click **Cancel**. * If the member understands and wants to continue with the request, proceed to the next step. |
| **12** | Verify the Shipping Options, Shipping Address, Phone Number, and Payment Method. Update these selections as needed using the appropriate dropdowns and **Add/Update** buttons, then click **Submit Support Task**.  **Notes:**   * If a pop-up message displays indicating the Test Claim failed, refer to the [Scenario Guide](#_Scenario_Guide). * If the member’s address is updated and a pop-up message displays Not in Stock / In Stock, refer to the [Scenario Guide](#_Scenario_Guide).     **Result:** The Courtesy Retranslation Support Task Submitted popup displays: |
| **13** | Educate the member on a turnaround time of 72 business hours for the request, not including standard processing and shipping time for the order.  **Note:** Click **Close** to exit the Courtesy Retranslation Support Task Submitted popup. |

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| **Scenario Guide** |

Utilize the scenario guide for the following situations: (Select from hyperlinked options below):

[Prior PBM Rx unable to be refilled](#_Toc206674377)

[Test claims failed to run](#_Toc206674378)

[ **MED D Only:**](#_Toc206674379) [Viewing Messages (View hyperlink displays)](#_Toc206674380)

[Clicking Submit Support Task](#_Toc206674381)

[Not Available or Not in Stock at Mail for Bulk Up](#_Toc206674382)

[The member’s address is updated during the Downsizing an Rx or Variable Fill Requests and a pop-up message displays **Not in Stock/In Stock at Mail**](#_Toc206674383)

[Member requests Brand instead of Generic](#_Toc206674384)

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| **Scenario** | **Action** | | |
| 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 will remain open until the agent dismisses the message. After closing the Rx error message, Compass will deselect 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 located below the **Prior PBM Rxs** table. | | |
| Test claims failed to run Try rerunning test claims. | 1. Click the Try rerunning test claims hyperlink.     **Result:** The Courtesy Retranslation Support Task – Test Claim Results screen displays.   * The **Approved/Rejected** column displays: “Test Claim failed.” * The following message will display in the **Cost** section: “Test Claim failed. **Run a manual test claim**.”  1. Click the Run a manual test claim hyperlink.     **Result:** The Test Claim subtab opens.  **Notes:**   * **Approved/Rejected** field displays: “Test Claim failed.” * The **Total Cost** is blank. * Click **Cancel** to exit the Support Task.  1. Return to the following Step in the appropriate section:  * **Downsizing a Prescription Request**,refer to [Step 9](#DownsizingStep9). * **Variable Fill Request**, refer to [Step 10](#VariableFillStep10). | | |
| **MED D Only:** Viewing Messages (View hyperlink displays) | 1. Click the **View** hyperlink located within the **Messages** column.     **Results:** The Messaging screen displays.  **Example:** Transition Fill used.    **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 Courtesy Retranslation Support Task screen.  1. Return to the following Step in the appropriate section:  * **Bulk Up,** refer to [Step 9](#BulkUpStep9). * **Downsizing a Prescription Request,** refer to [Step 10](#DownsizingStep10). * **Variable Fill Request,** refer to [Step 11](#VariableStep11). | | |
| Clicking Submit Support Task The Test Claim failed to run automatically | When the **Review the Following** pop-up message below displays, a manual Test Claim is needed to provide the member with the copay amount: “The test claim failed to run automatically. Verify you have provided the copay.” | | |
| **If...** | | **Then...** |
| Manual Test Claim has been run | | 1. Click the **checkbox** to indicate “I have run a manual test claim and provided the copay amount to the member.”   **Result:** ThePlace Order button illuminates.   1. Click Place Order to continue with the order.  * Click **Cancel** to return to the Courtesy Retranslation Support Task screen.  1. Return to the following Step in the appropriate section:  * **Downsizing a Prescription Request** refer to [Step 9](#DownsizingStep9). * **Variable Fill Request** refer to [Step 10](#VariableFillStep10). |
| Not Available or Not in Stock at Mail for Bulk Up | When the Bulk Up option is selected, if a bulk up can be requested, Compass will validate if the Rx is either Not in Stock or Not Available at Mail. | | |
| **If the Rx is…** | **Then…** | |
| Not in Stock at Mail | The following pop up will display:     * Advise the caller of the options available to them:  1. Advise the caller that the bulk up can be submitted, 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, click **Continue**.  * If the caller wants to proceed with this, inform them that if they try and fill the original medication at another in network pharmacy, the order submitted would need to be canceled or the Rx Not in Stock would need to be placed on hold before it can be filled.  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 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 alternative medications, if the caller ask 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 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. * After providing options to the caller:   + If the caller wants to proceed with the Bulk Up, click **Continue**.   + If the caller does not want to proceed, click **Cancel**. | |
| Not Available at Mail | The following 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 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 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 Available at Mail**, advise the caller they would need to fill the prescription at another 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. * After the caller has been educated on their options, click **Close** and Place this Rx on Indefinite Hold. Refer to Compass - Placing/Releasing a Prescription (Rx) in Process on Hold/From Hold (056362). | |
| The member’s address is updated during the Downsizing an Rx or Variable Fill Requests and a pop-up message displays **Not in Stock/In Stock at Mail** | In the request are Not in Stock at Mail | If Rx(s) is Not in Stock at Mail the **Availability Status Change** pop-up will display with impacted medications.    Advise the caller of the **Member options** available to them:   * Advise the caller that we can place the order 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 **Confirm Rxs in Refill**.   **Note:** If the caller wants to proceed with the refill, inform them that if they try and fill the original medication at another in network pharmacy, the order submitted would need to be canceled or the Rx that is Not in Stock would need to be placed on hold before it can be filled.  **Result:** The **Confirm Rxs for Refill** pop-up will include any Rxs whose status is Not in Stock that the agent indicated should be included in the refill request, and all other Rxs in the refill request.    **Notes:**   * Agent can click **Return to Availability Changes** to return to the Availability Status Change pop-up. * Click **Cancel** to dismiss the pop-up and no action is taken. * Verify everything is correct on the Refill Rx – Verify Screen before clicking **Submit Refill**.   Click **Cancel** to go back to the **Refill Rx - Verify** screen before continuing.   * **Downsizing a Prescription Request:** Return to [Step 6](#DownsizingStep6) in the process. * **Variable Fill Request:** Return to [Step 7](#VariableStep7) in the process.   **If the caller does not want to proceed:**   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 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 alternatives medication, if the caller ask 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 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. | |
| In the request is In Stock at mail | The **Availability Status Change** pop-up will display. In the **Status Changed to** field, **In Stock** will display along with the impacted medication(s).    Click **Cancel** to go back to the **Refill Rx – Verify Screen.**   * **Downsizing a Prescription Request:** Return to [Step 6](#DownsizingStep6) in the process. * **Variable Fill Request:** Return to [Step 7](#VariableStep7) in the process. | |
| Member requests Brand instead of Generic | This process should not be referred to as a “courtesy retranslation.” Refer to [Compass - Refusal of Generic Substitution (065145)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b2c517c7-2dd7-4c2d-bedf-e334789ffc49). | | |

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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)

**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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