# Compass – Externally Adjudicated Member (Identify, Test Claims, New Rx, and Refills)

[Identifying an Externally Adjudicated Member](#_Toc205820311)

[Externally Adjudicated Accounts for Boeing Scenario Guide](#_Toc205820312)

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**Description:** Used to identify and perform certain processes for an Externally Adjudicated member and may include inquiries about the cost of the medication or if the drug is covered.

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| Identifying an Externally Adjudicated Member |

* An Externally Adjudicated Client is considered a plan sponsor and therefore considered financially responsible.
* Externally Adjudicated are clients who CVS Caremark and/or SilverScript will only fill the prescription and send it out to the member.
* We are limited to providing drug coverage and/or co-payments. Refer to [Boeing Scenario Guide](#_Externally_Adjudicated_Accounts) for details regarding the Boeing client.
* The Caremark.com hyperlink located in the Member Snapshot will be available to Externally Adjudicated clients.

If unable to locate the correct account in the **Search Results** section on the Search by Member screen, search externally adjudicated accounts.

 Do not advise the caller a search is being conducted using the Externally Adjudicated link to locate the account. Use the search parameter to attempt to locate the member’s account without advising the caller of the search process.

Complete the following:

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| **Step** | **Action** |
| **1** | Input the Member ID or name and DOB to search for the member.  **Notes:**   * Wildcard Searches cannot be performed for externally adjudicated accounts; the full name must be entered. * Externally Adjudicated accounts can also be found using the link on the Search by Mail Order Rx/Internal ID screen and Search by Member screen.   When searching for a member’s account by name and DOB (Date of birth), if the member has any previous accounts whether active or not active, Compass will display search results for the non-externally adjudicated account. |
| **2** | Click the **searching accounts that are externally adjudicated** link (above the Search Results filters) to locate accounts the member may have if the correct account does not populate in the initial search results.    **Results:**   * If externally adjudicated accounts are found, the member account linked to the ID # entered populates. * After the authentication flow, when entering an account that is externally adjudicated, a banner will be present on the account signifying the account is Externally Adjudicated. * The following message displays on **inactive plans:** “Expired eligibility period. No benefits available.” * The following message displays on **future dated plans:** “Future eligibility period. No benefits available.”     Most Functionalities in externally adjudicated accounts will be view only or be disabled, due to only servicing mail order for these members.  The following is **not** an all-inclusive list of mail order actions that will be available on an externally adjudicated account:   * New Rx * Refills * Order Status * DPC Request * Courtesy Retranslations * Reship   Copays will not be provided on externally adjudicated accounts. Test Claim functionality will be disabled in an externally adjudicated account. Refer to Boeing Scenario Guide for details regarding the Boeing client.  **Example:** The Refill Verification screen does not display member copay. |

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| Externally Adjudicated Accounts for Boeing Scenario Guide |

This section outlines the process specifically for Boeing externally adjudicated accounts. Refer to the CIF for more information on any client specific processes.

**Note:** Wildcard searches can be performed for the Boeing client.

Never utilize test claims from the **Boeing Test Claim** feature in the **Quick Actions** panel. Refer to the Scenarios below on how and when to utilize test claims.



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| **Scenario** | **Action** |
| **Providing Pricing when placing a refill.** | For Boeing Members, Compass will have a “**Run a manual test claim for Boeing**” hyperlink on the Refill Verification and Refill Confirmation Screens to navigate to the Boeing Test Claim Screen to provide pricing on the refill request.    **Result:** The Rx’s information will be pre-populated in the List of Test Claims to Run table. Refer to Running Test Claims scenario below. |
| **Placing a New Rx Request for a Boeing member** | For Boeing Members, after clicking **New Rx Request** in the Quick Actions panel and selecting **Member Needing New Drug** for the appropriate member, utilizing the **Find a Drug** option is the only way to start the New Rx Flow. There will be no ability to select from the Previous Prescriptions.  **Note:** If no drugs are shown in the Requested Drugs section, text will display “No drugs selected yet. Select Member Needing New Drug then Find Drug.”  Once the medication(s) are selected from Find a Drug they will be added to the Requested Drugs section of the Place a New Rx – Drug and Dosage screen.    Once all drugs are added, click **Next** to continue.  **Result:** After proceeding through the standard New Rx flow, Compass will have a “**Run a manual test claim for Boeing**” hyperlink on the Refill Verification and Refill Confirmation Screens to navigate to the Boeing Test Claim Screen to provide pricing on the New Rx request. Refer to Running Test Claims scenario below.  **Note:** All other New Rx flow and functionality will remain the same, 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) as needed.    The Rx’s information will be pre-populated on the List of Test Claims to Run table. |
| **Future Fill Manage Diverts** | To provide pricing for a Boeing member, click the **Run a manual test claim for Boeing** hyperlink within in the Order Details. Refer to Running Test Claims scenario below.  **Note:** The Manage this Conflict hyperlink in the orange banner will not provide pricing.    **Result**: Compass will prepopulate the following information into the List of Test Claims to Run table from the Rx’s that are listed in the order:   * Member Name – Relationship * Drug Name/Strength * Schedule * Package Size * Mail Total Quantity * Mail Days * Dispense as Written |
| **Early Refill, DPC, Request, Courtesy Retranslation (Bulk up and Downsizing) workflows** | When a price estimate is needed for Early refill, DPC request, and Courtesy Retranslation workflows, the “Run a manual test claim for Boeing” hyperlink will be present and when clicked the user will be directed to the Boeing Test Claim Screen to provide pricing. ​    **Result:** The Rx’s information will be pre-populated in the List of Test Claims to Run table. Refer to, Running Test Claims scenario below. |
| **Running Test Claims** | When running test claims for **Packaged Medications** (pre-populating from a Refill), manually adjust the **# of Packages** to the **# of Units** before the test claim is submitted on the Boeing Test Claim Screen.   * From the **Enter Test Claim Criteria** screen, verify the drug information in the **List** **of** **Test Claims to Run** table is correct. * If drug information is not correct, use the **Find Drug** button and add the drug to the **List of Test Claims to Run** table. * Click **Run Test Claims**.     **Notes**:   * Fill Date will default to current date only and **cannot** be changed. * To add a drug to the List of Test Claims to Run table, the “Find a Drug” button can be utilized or select a prescription on file from Rx History section and click the **Add to Test Claim List** button. * When selecting a prescription from the **Rx History** section and the drug is not available at mail, the **Not Available/Not in Stock at Mail** pop up displays. User can **Include in Test Claims** or **Cancel** and return to the **Enter Test Claim Criteria** screen. * The **Check CVS Retail Inventory** hyperlink will open the CVS Retail Inventory checker with the Rx(s) pre-populated. For more information refer to, Compass – Search for [CVS -Search for 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).      * Test Claims will be limited to **Mail Order** only. No options will be available to run a test claim for Retail claims. * All test claims for medications will be ran individually, they cannot be price stacked. * Drug alternatives will not be available. * Users will have the ability to select the member for each drug that is added to the **List of Test Claim to Run** table. * In the **List of Test Claims to Run** table, the **Mail Availability** field will display the Rx(s) status at the Caremark Mail Order Pharmacy with one of the following statuses: * **In stock** * **Not available** * **Not in stock** * **Undetermined** (This status will show as a hyperlink when clicked, a pop up will display “Advise member that we are unable to guarantee that <drug name/strength> is available to be filled at mail.”)     **Result:** The View Test Claim Results screen displays.       * If a rejection is present on the test claim, click the **reject code** hyperlink.   **Result**: Messaging pop up for the rejected medication displays.    The reject messaging pop up displays the reject code and basic descriptions for the reject. No Additional Messages or DUR messages will be available.  For additional questions regarding the rejected claim, click the **CIF hyperlink** to review the Boeing CIF. |

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| Related Documents |

[Customer Care Abbreviations and Definition 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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