Frequently Asked Questions
for
My RxBenefits Book

Q: What is My RxBenefits Book?

A: My RxBenefits Book is our online portal designed specifically for benefits advisors. It provides you with real-time, expanded access to your client's essential pharmacy benefits data 24/7/365.

Q: How do I access the portal?

A: Given the sensitive nature of the information on the portal, new users will need to request access through their RxBenefits Account Manager. Simply contact your account team to set up your account using your company email address. New accounts are typically created within three business days of receiving your request.

After your account is set up, you'll receive a welcome email. Once you get the email, you can log in two ways: click the link in the Welcome email or access the portal through **www.RxBenefits.com** and go to your login page.

Note: Optimize MyPlan (OMP) portal active users and those who receive emailed pharmacy dashboard reports from RxBenefits will be migrated automatically to My RxBenefits Book with pre-established accounts tied to your company email address. Users will have access to the same data as in OMP and similar report data. Any pharmacy dashboard reports you were receiving via email will stop being sent in November 2024 and you will then access the data in new reports available within My RxBenefits Book.

Q: What security measures does the portal have in place to protect sensitive information?

A: The portal was created with security at the forefront. Users will log in with password-less authentication (no password needed) and receive a one-time passcode each time. In addition, user-specific, permission-based views ensure that access to sensitive information is always well protected. Not every user will have access to every available portal feature.

Q: What features does My RxBenefits Book have?

A: The portal provides access to a variety of key features and data, including the ability to:

- View organizations
- View and edit member and eligibility data
- View an organization's consolidated invoice, including claims summary, claims detail, and claims export
- Receive files that have been shared by their RxBenefits account team
- Configure, generate, share, and schedule an array of reports
- Access general financial information

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Q: What are the most optimal times to run reports on the portal for the prior month?

A: For CVS® and Optum Rx® clients, the most optimal time to run reports is the 2nd Saturday of each month or later. For Express Scripts® (ESI) clients, the most optimal time is the next to last Saturday of each month or later. This enables us to populate the claims data in our systems and helps ensure that as many claims as possible will be included in the previous month's reports.

Q: What should I do if I already have a portal account, but don't have access to everything I need?

A: Contact your RxBenefits account team. They can tell you if the functionality you're requesting is available to you and if so, make the request to have your account updated with the necessary permissions. Updates to existing portal accounts are typically made within three business days following the request.

Q: What devices and browsers can be used to access the portal?

A: My RxBenefits Book was designed and tested to work with the latest versions of the Chrome, Edge, and Firefox desktop browsers. The portal was not designed to be accessed from a mobile device or mobile browser.

Q: What do I do if I experience a problem with the portal?

A: Send an email to ITSupport@rxbenefits.com.

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If you have additional questions, please contact your RxBenefits Account Manager.

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