# Compass - Viewing Member’s Recent Cases and Viewing PeopleSafe Activity (RM Task Information) in Compass

[Viewing Compass Notes](#_Toc205447166)

[Viewing All Family Cases](#_Toc205447167)

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**Description:** Used to view Member’s Recent Cases entered in both Compass and PeopleSafe from the Case Details Landing Page in Compass.

**Note:** Refer to [Viewing Compass Activity in PeopleSafe (057130)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=8ad2036b-9bde-497b-add4-ba4e28ec65e2) to view Compass Activity in PeopleSafe.

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| Viewing Compass Notes |

To review member’s recent cases from previous calls that were made in Compass, perform the following steps:

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| **Step** | **Action** |
| **1** | Click the **tab** located to the left of the Member Snapshot tab to open the Case Details Landing Page. Navigate to the **Member’s Recent Cases** panel and click **View All Cases**.  **Result:** Method of Contact icons display: Voice engagement, Email engagement, and Chat.    **Result:** TheCase History page displays. |
| **2** | Click the appropriate **Case** hyperlink.    **Result:** The Case Details page displays. |
| **3** | From the **Case Comments** panel, click **View All**.    **Result:** The Case Comments page displays. |
| **4** | Review the previous agent’s notes in **Case Comments**. |

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| Viewing All Family Cases |

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To review all the family members’ cases, perform the following steps:

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| **Step** | **Action** |
| **1** | Click the **tab** located to the left of the Member Snapshot tab to open the **Case Details Landing Page**. Navigate to the **Member’s Recent Cases** panel and click **View All Family Cases**.  A screenshot of a phone number  AI-generated content may be incorrect.  **Result:** Member Journey - Family screen displays. |
| **2** | Click the appropriate **Case#** hyperlink. Refer to Compass – Member Journey (069284) for additional information.  A screenshot of a computer  AI-generated content may be incorrect.  **Result:** Details page displays. |
| **3** | Scroll down to **Additional Information** section to review Previous Case Comment section.  A screenshot of a computer  AI-generated content may be incorrect. |

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| Viewing PeopleSafe Activity (RM Task Information within Compass) |

To review member’s recent cases from previous calls that were made in PeopleSafe, perform the following steps:

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| **Step** | **Action** |
| **1** | Click the **tab** located to the left of the Member Snapshot tab to open the Case Details Landing Page**.** Navigate to the **Member’s Recent Cases** panel and click **View PeopleSafe Activity**.      **Result:** The View PeopleSafe Activity page displays. |
| **2** | Review previous agents’ notes as follows:   * Click the **Activity** hyperlink to show auto-populated notes from PeopleSafe. * Click the **Notes** hyperlink to show documentation entered by the agent in PeopleSafe. * Click the **Task ID** hyperlink to display task information submitted in PeopleSafe.     **Note:** Enter a **Start Date** and **End Date**, then click **Apply** to filter the activity on the screen. |

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| Viewing Enterprise Interactions |

To view detailed information about the interaction displayed, including the mode of communication (Phone, MP, IVR, Portal, etcetera) and the type of activity performed, perform the following steps:

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| **Step** | **Action** |
| **1** | Click the **tab** located to the left of the Member Snapshot tab to open the Case Details Landing **Page.** Navigate to the **Member’s Recent Cases** panel and click **View Enterprise Interactions**.    **Result:** TheView Enterprise Interactions page displays. |
| **2** | Review the View Enterprise Interactions page.    **Member Interactions will include the following columns:**   * Date * Time * Channel (Phone, Web, etcetera) * Application * Interaction (such as session start/session end) * Reference   **Notes:**   * The screen will initially be displayed by **Date** and **Time** in descending order. * Agent can sort each column using the . (Sorting not available for the **Reference** column.) * If interactions are more than 200, “Displaying the 200 most recent Enterprise Interactions,” message displays. * If no records found, View Enterprise Interactions screen will display, **“No Records Found**.” * When unable to retrieve interactions due to system error, standard error message per IT guidelines displays. |

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| Related Documents |

* [Compass - Close an Interaction or Research Case (050011)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=0296717e-6df6-4184-b337-13abcd4b070b)
* [Customer Care Abbreviations, Definitions, 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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