### Compass MED D - Viewing Grievance History in Compass

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**Description:** Guidance when a Medicare Part D beneficiary calls regarding a previously submitted Grievance (complaint) with any aspect of a plan’s (Client’s) operations, activities, or behaviors.

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| Reminders |

#### If the beneficiary is calling regarding a phone call received from a grievance caseworker, the relevant call notes will not be listed in Compass. The call notes from the grievance caseworker will be listed in a different system depending on the client:



* **HP and NEJE:** MHK Fusion. Refer to [MED D - MHK Fusion Work Instructions (HP, JE) (040888)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=000f52df-3238-4305-8158-b41ab631162d) as needed.
* **SSI PDP, SSI EGWP, and Aetna EGWP:** MHK Nitro.Refer to the “Previously Submitted Grievances in MHK Nitro” section in [Compass MED D - Grievances in MHK Nitro (SSI PDP, SSI EGWP, Aetna EGWP) (062961)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=37ded34e-2d00-4d5b-8f79-773481289f06) as needed.

#### If the beneficiary is dissatisfied with the service received from a grievance caseworker, file a grievance.

**DO NOT** enter another Grievance for the same Category if the Grievance is still open.

* If there is an open/in-progress Grievance, educate the member that the issue has been filed and advise of TAT.
* If there is an open Grievance and another Grievance in the same Category occurs, notate the account and proceed depending on the client:
  + **HP and NEJE (MHK Fusion):** Send an email to [DelegatedGrievance@CVSHealth.com](mailto:DelegatedGrievance@CVSHealth.com) and CC your supervisor.
  + **SSI PDP, SSI EGWP, and Aetna EGWP (MHK Nitro):** Alert your supervisor to review. Your supervisor will send an email to [MedicareOralGrievanceUnitMailbox@aetna.com](mailto:MedicareOralGrievanceUnitMailbox@aetna.com) notifying the Grievance team.
* It is the Category that determines the Grievance, not the subcategory.
* If the previous Grievance is closed/resolved, file a new Grievance.

When the CCR completes the Grievance submission, the item is now viewable on the beneficiary’s account in **Compass**.

* If the beneficiary calls back about a previously filed Grievance, Case Comments or other details added by the Grievance Department can be viewed.
* Review the **Grievance History** panel to see historical grievances filed within the last 60 days.

Status of previously filed Grievance:

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| Status Reason | Open or Closed |
| CARE Resolution | Grievance is closed |
| Manually Closed | Grievance is closed |
| Verbal and Written Resolution | Grievance is closed |
| Verbal Resolution | Grievance is closed |
| Written Resolution | Grievance is closed |
| Research | Grievance is open and being researched |
| Pending Exception Review | Grievance is open but in final review stage prior to closure |
| New Grievance | Grievance is open but pending initial review |
| First Call Resolution | Grievance is open but pending review prior to closure |
| Pending AOR | Grievance is pended needing an AOR/POA documentation |
| Coverage Determination | Grievance was cancelled as a CD only issue |
| Duplicate | Grievance was cancelled as a duplicate filing |
| Non-grievance Item | Grievance was cancelled as it was not a valid grievance issue |
| Non-supported Category | Grievance was cancelled as the category is not delegated to CVS Caremark |
| Non-supported Client | Grievance was cancelled as the client is not delegated to CVS Caremark |
| Past 60 day Filing Limit | Grievance was dismissed due to being filed past the timeframe allowed by CMS |
| No AOR/POA on File | Grievance was dismissed for lack of AOR/POA documentation |
| Member Withdrew Grievance | Grievance was withdrawn by the beneficiary or their purported representative |

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| Viewing Grievance History when Submitting a Grievance |

Follow the step below:

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| **Step** | **Action** | | |
| **1** | From the Member Snapshot Landing Page in Compass, navigate to the **Quick Actions** panel and proceed depending on the **View Submitted Grievances** hyperlink available. | | |
| **If…** | | **Then…** |
| Submit Grievance | | CVS handles the grievances (HP or NEJE client). Click **Submit Grievance** (only viewable when in an Interaction Case).  **Result:** A pop-up displays to check who is submitting the Grievance.  Proceed to [Step 2](#Step2). |
| Submit New Grievance | | CVS handles the grievances (SSI PDP, SSI EGWP, or Aetna EGWP client). Click **Submit New Grievance** (only viewable when in an Interaction Case).  **Result:** A pop-up displays to check who is submitting the Grievance.  Proceed to [Step 2](#Step2). |
| Submit Non-Delegated Grievance | | Client handles the grievances.  **DO NOT click this link**.   * Grievance history is not captured in Compass for non-delegated clients. |
| If you attempt to initiate the grievance under secondary coverage, Compass will not allow the grievance to continue and will display the following message. **Do not read to member:** “A grievance may only be filed in the primary line of coverage. Access the primary line of coverage to submit a grievance.”    **Note:** The **Submit Grievance/Submit New Grievance** hyperlink will be disabled in the **Quick Actions** panel for the following reasons:   * If the client handles Grievances. Refer to the “Creating a Non-Delegated Grievance in Compass” section of [Compass MED D - How to File a Grievances in Compass (066742)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a1bfd5ce-4c26-4dbb-a851-188f548bdf81) for additional information. | | |
| **2** | Verify the **Caller’s Name** and **Who is Calling** fields are correct, then click **Next**.  **Note:** For assistance with these selections while submitting a Grievance, refer to the main work instruction: [Compass MED D - How to File a Grievance in Compass (066742)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a1bfd5ce-4c26-4dbb-a851-188f548bdf81).    **Result:** The General Grievance Information screen displays. | | |
| **3** | Review the **Grievance History** panel to see historical grievances filed within the last 60 days.   * To locate the Grievance in question, review the **Date** and/or the **Category** (Type) columns in the **Grievance History** panel.     Refer to table below as needed: | | |
| **If the Grievance is…** | **Then…** | |
| Located from the **Grievance History** panel | Click the **ID** hyperlink to view the Grievance.    **Result:** The **Grievance Details** screen displays the following information:   * Grievance ID * Status * Category * Type * Date/Time Submitted * Clients Grievance ID * Notes | |
| Not located from the **Grievance History** panel | * Click the **View All** hyperlink at the bottom of the **Grievance History** panel.     **Result:** The Grievance History screen displays.   * Review all listed Grievances, then click the **ID** hyperlink to view the appropriate Grievance.     **Result:** The **Grievance Details** screen displays the following information:   * Grievance ID * Status * Category * Type * Date/Time Submitted * Clients Grievance ID * Notes | |
| **4** | After reviewing the Grievance Details, close the **Grievance History** tab.   * If a new Grievance needs to be filed, proceed to [Compass MED D - How to File a Grievances in Compass (066742)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a1bfd5ce-4c26-4dbb-a851-188f548bdf81). * If no new Grievance needs to be filed, click **Discard** at the bottom of the General Grievance Information screen. | | |

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| Viewing Grievance History from Quick Actions Tab (Not Submitting a Grievance) |

Follow the step below:

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| **Step** | **Action** | |
| **1** | From the Member Snapshot Landing Page in Compass, navigate to the **Quick Actions** panel and proceed depending on the **View Submitted Grievances** hyperlink available  A screenshot of a computer  Description automatically generated | |
|  | Review the **Grievance History** panel to see historical grievances filed within the last 60 days.   * To locate the Grievance in question, review the **Date** and/or the **Category** (Type) columns in the **Grievance History** panel.     Refer to table below as needed: | |
| **If the Grievance is…** | **Then…** |
| Located from the **Grievance History** panel | Click the **ID** hyperlink to view the Grievance.    **Result:** The **Grievance Details** screen displays the following information:   * Grievance ID * Status * Category * Type * Date/Time Submitted * Clients Grievance ID * Notes |
| Not located from the **Grievance History** panel | * Click the **View All** hyperlink at the bottom of the **Grievance History** panel.     **Result:** The Grievance History screen displays.   * Review all listed Grievances, then click the **ID** hyperlink to view the appropriate Grievance.     **Result:** The **Grievance Details** screen displays the following information:   * Grievance ID * Status * Category * Type * Date/Time Submitted * Clients Grievance ID * Notes |

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| Related Documents |

**Parent Document:** CALL-0048, [Medicare Part D Customer Care Call Center Requirements-CVS Caremark Part D Services, L.L.C.](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0048)

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

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