# Compass - Submitting Feedback and Reporting Client Issues

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**Description:** This work instruction explains how to submit feedback for a CIF and the process for submitting a client issue form.

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| Important Information |

**Note:** All CIF feedback should continue to be submitted through the existing feedback function.

When reporting a client issue, be prepared to provide the following required information on the form:

* Client Name and Carrier Code for associated issues
* Aetna client – indicate yes or no
* Member information – Name and ID number
* A description of the issue along with specific details of the issue

Refer to the table below to determine the correct process for submitting issues.

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| **Scenario** | **Action to Take** |
| Suggestions for **improving the CIF document**, such as:   * Missing/Confusing/Conflicting information within a document and/or Compass * Incomplete/Inaccurate information within a document * Broken Hyperlinks * Outdated information that requires an update * Significant typos/spelling/grammatical errors * Suggestions on additional content to add or change to a document | Submit feedback about the CIF using the Compose Feedback form.  **Reminder:** Do NOT include any member PHI (protected health information). |
| **Issues or trends impacting more than one member/Client**, such as:   * Eligibility * ID Cards/Materials * Benefits (UIDs not working, pricing/copay, etc.) * Phone Issues (IVR issues) | **Submit the** [**Reporting Client Issue Form**](https://aetnao365.sharepoint.com/:l:/s/ClientOps2/FJnS5lmyAJVGgAOrOxCGAyYBkHcxaYXRLnlKgzHPG-VmLg?nav=ODY4NWI3ZDQtMzZkYy00ODE0LTg4NjctM2YzY2VkNmIwYTE2)  **Do not use this for individual member issues.**   * If it is unclear whether or not the issue is widespread, use your support channels such as the Senior Team or your Supervisor for assistance and confirmation that it is a widespread client issue before submitting this form. |
| Other issues, such as:   * Individual work station/system issues * Normal everyday issues that occur not related to a client implementation or a client change * Issues with systems or processes that are not specific to a client * Callback requests * Member complaints | These requests should be handled with standard work instruction/call handling procedures. Reach out to your Supervisor and/or Senior Team for assistance if needed. |

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| Submitting Feedback on a CIF |

Users are able to provide feedback on documents through the **Message** icon located at the bottom left of every document in theSource.

 Do NOT use the Compose Feedback form to report client issues that involve specific member information. Member PHI (protected health information) should never be submitted in the Compose Feedback form. [There is a separate process for this, refer to Form for Reporting Client Issues](#_Submitting_Feedback).

Perform the steps below:

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| **Step** | **Action** | |
| **1** | Access a CIF on **theSource**. | |
| **2** | Click the **Message** icon in the lower left of the screen.    **Result: Compose Feedback** window displays in the upper right corner of the screen.  The Compose Feedback form will display the Content ID and Document Title at the top. There are options to select to classify the feedback and provide details and upload an attachment if needed. There is also a field to enter your email address to received responses back to your messages. | |
| **3** | Select the Feedback type: | |
| **If…** | **Then select…** |
| You like the document and would like to submit positive Feedback | **It’s good!** |
| You think the document needs changes | **It needs improvement**  **Result:** The section will prompt you to classify your Feedback further. Select the appropriate options from the list. |
| **4** | Enter your email address in the **Email** field if it is not already populated. | |
| **5** | Type a **detailed** message in the **Tell Us More** field.  **Example:** | |
| **6** | Click the **paperclip** icon to add a file (optional).  **Note:** Multiple files may be uploaded. To do so, save the files on your computer in the same location and then when prompted to select a file, use Ctrl-click to select the multiple files. | |
| **7** | Click **Send** to submit your feedback.  **Result:** Confirmation message will display.    **What happens after I submit feedback?**  Your feedback will be routed to the appropriate department. Turnaround times for resolution will vary based on the request. You will only receive an email if additional information is needed.  **Note:** All CIF updates need approval to be updated. Updates will not be made based off of emails/phone calls received. | |

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| Reporting Client Issues |

Follow these steps to submit a Form for Reporting Client Issues.

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| **Step** | **Action** |
| **1** | **Complete and Submit the** [**Reporting Client Issue Form**](https://aetnao365.sharepoint.com/:l:/s/ClientOps2/FJnS5lmyAJVGgAOrOxCGAyYBkHcxaYXRLnlKgzHPG-VmLg?nav=ODY4NWI3ZDQtMzZkYy00ODE0LTg4NjctM2YzY2VkNmIwYTE2)  Once the form is submitted you will receive confirmation that the response was complete. |

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| Tips |

* Expand all and CTRL + F before submitting feedback for missing information
* Refer to [theSource CIF Commercial Job aid](file:///C:\Users\c071417\Downloads\TSRC-PROD-002190) to become familiar with all sections of the CIF
* Need to Know Comments show the newest information at the **bottom** of the section
* Make sure you access the correct CIF per the Carrier Code you are referencing
* Make sure you have examples to provide when reporting an issue, the more detailed the better

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| Examples of Feedback and Client Issues to Report |

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| **Invalid Feedback** | **Valid Feedback** |
| * John from the PA department transferred the member to me without asking if they needed my help * This sentence needs a period. (no reference to the sentence in question) * Who can enter vacation overrides? * Spelling error (does not indicate which word) * Typo in need to know (does not state which word) * Universal IDs are pulling up multiple different accounts. Each account gives different test claim information. we need to know what universal ID exactly that we are going into * IVR issues for NON-CVS phone numbers (we cannot control the prompts for numbers we don’t own) | * Can UIDs be added to the CIF? * Are vaccines covered under the plan? * How do paper claims process; the CIF just states yes. * Drug list needs updated. * Open Enrollment starts Monday and there is nothing in the CIF. * Broken Links (specify the link). * Client handles eligibility but there is no phone number. * Maintenance Choice discrepancies between Compass and the CIF. |

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| **Invalid Client Issue** | **Valid Client Issue** |
| * The IVR talks too fast * The IVR doesn’t understand my accent * The Client’s IVR is not working * The member is not happy with their plan design * One-off member issues | * New members calling in and none of the prescriptions transferred. * New members calling in and they did not receive ID cards or materials. * IVR keeps kicking members to a rep when they want to place order through the IVR. |

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| Related Documents |

**Abbreviations/Definitions:** [Customer Care Abbreviations, Definitions, and Terms](file:///C:\AppData\Local\Microsoft\Windows\INetCache\Content.Outlook\1U3BCLSL\CMS-2-017428) – (017428)

**Parent SOP:** [CALL 0049 Customer Care Internal and External Call Handling](https://policy.corp.cvscaremark.com/pnp/faces/DocRenderer?documentId=CALL-0049)

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