# Compass - Close an Interaction or Research Case

[Reminders](#_Toc194392289)

[Close an Interaction Case](#_Toc194392290)

[Compass - Closing Open Interaction Cases From the You Already Have an Interaction Case Open Screen](#_Toc194392291)

[Close Open/Stuck Tabs](#_Toc194392292)

[Close a Research Case](#_Toc194392293)

[Entering Additional Documentation During the Call](#_Toc194392294)

[Close a Case Scenario Guide](#_Toc194392295)

[Related Documents](#_Toc194392296)

**Description:** Outlines how to close an interaction or research case in Compass.

|  |
| --- |
| Reminders |

Compass users may only have one (1) open Interaction Case at a time. For steps to close an open Interaction Case where you already have an Interaction case open screen in Compass. Refer to section titled: [Compass – Closing Open Interaction Cases From the You Already have an Interaction Case Open screen.](#_Compass_-_Closing)

Do **not** copy/paste authentication information into the Case Comments. Authentication information is recorded in the Case details.



[Top of the Document](#_top)

|  |
| --- |
| Close an Interaction Case |

Perform the following steps:

|  |  |
| --- | --- |
| **Step** | **Action** |
| **1** | Review the **Case Data** displaying at the top of the screen once the caller has been authenticated in **Compass**. The **Close Case** button is available on all Compass screens for the entire call. Select it when needed.    **Result:** The **Close Case** window displays.    **Notes:**   * If with Cresta, you do not need to manually enter case notes, the call summary is transferred from Cresta to Compass Case Notes section automatically after you close the case for your call. Refer to [Cresta Functionality and Processes (067901)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f28dbdf4-4355-45be-95c4-6bda1c08a521) for additional information. * When Cresta is down/not available add Case Comments, formatted as required by the CIF and/or line of business. If there is no CIF or line of business formatting requirements, use a “Reason, Action, Results” format, as outlined in [Universal Care - Consultative Call Flow (CCF) Process (095822)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c954b131-7884-494c-b4bb-dfc12fdc846f). |
| **2** | 1. Choose the **Reason for Closing Case** from the drop-down menu.     **Notes:**   * If need to make changes to your Primary Interaction Reason, refer to [Compass - Primary Interaction Reason (PIR) (064447)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=b9a50365-4c4b-4157-8c7b-00f8e1e6b6f3) and select the most accurate option. * The Reason for Closing Case is “Interaction Completed,” an additional question displays. Refer to the [Scenario Guide](#_Call_Documentation_Scenario) below. * The Reason for Closing Case defaults to “Interaction Completed” if a Service Request was created during the call. Refer to the [Scenario Guide](#_Call_Documentation_Scenario) below. * The Reason for Closing Case defaults to “Interaction Complete + Task” if a Support Task was created during the call. Refer to the [Scenario Guide](#_Call_Documentation_Scenario) below.   **Describe the Primary Interaction Reason** will display if during authentication “Other” was chosen for both the **Primary Interaction Reason** and **Primary Interaction Reason Detail** fields. Closing the case will not be available until all other required documentation is completed. Documentation in this box is required before the case can be closed.  **Note:** In most cases, “Other” should NOT be selected.     1. The **Contract Type** field will display for some Clients; select the appropriate option from the drop-down box based on the location that the claim was about (**Example:** Retail vs. Mail).   **Note:** If the **Contract Type** drop down box does not display, continue to the next step.     1. The **Communication Direction** drop-down menu will be pre-selected for most calls and may not require any changes. Select **Inbound** for incoming calls and **Outbound** for outgoing calls. **N/A** is available to be selected when inbound or outbound does not match your case.   There are two (2) scenarios where it will not be filled out and must be manually selected:   * If a call authentication process is canceled, and a manual search is then done. * If an account is closed and then a manual search is done.     **Note:** For outbound calls, refer to the [Close a Case Scenario guide](#_Call_Documentation_Scenario).  **Results:**   * The **Communication Direction** field will be filled out. * **Indication of previous contact on this topic** carryovers from the Primary Interaction Reason Modal and can be updated if needed when closing the case.      * If during authentication there was an indicator that the caller was eligible for a post-call survey, verbiage is provided to educate the caller on the post-call survey (verbiage may be client-specific). |
| **3** | Click **Close Case** (bottom right of the Close Case window), to close the account once call documentation is complete.    **Results:**   * The case is closed. * The following confirmation message displays: “Success! The Case <#> has been closed successfully.”   The **Close Case** button closes the member’s entire account. |

[Top of the Document](#_top)

|  |
| --- |
| Compass – Closing Open Interaction Cases From the You Already Have an Interaction Case Open Screen |

Compass users may only have one open Interaction Case at a time. When a user tries to open a new Interaction Case but already has an Interaction Case open **or** if you are ending a call and a new call comes in before you can Close the Case on your current interaction, the following pop-up message displays: “You can only have one Interaction Case open at a time, click Access the open Case to close it.”

Follow the steps below to close an open Interaction Case from the“**You already have an Interaction Case open**” screen:

|  |  |
| --- | --- |
| **Step** | **Action** |
| **1** | In the“**You already have an Interaction Case open**” screen, click the **Access the open case** hyperlink.  **Note:** Do not click the App Launcher (9 dots) to force Close the case tabs.  A screenshot of a computer  AI-generated content may be incorrect.  **Result:** The open Interaction Case displays. |
| **2** | Navigate to and click the **Close Case** button.  A screenshot of a computer  AI-generated content may be incorrect.  **Result:** The Close Case pop-up window will display. |
| **3** | Complete all required fields and select **Close Case** at the bottom of the window. Refer to the [Close an Interaction Case](#_Close_an_Interaction) section above as needed.   * If the Interaction Case will not save and close, verify all fields have been documented appropriately.     **Result:** TheOpen Interaction case closes and the **“You already have an Interaction Case open”** screen display. |
| **4** | Select **Next**.  A screenshot of a computer  AI-generated content may be incorrect.  **Result:** You can now proceed with Guided Authentication on the new Interaction Case. Refer to the appropriate work instruction:   * **Commercial and MED D:** [Compass – Guided Caller Authentication (50163)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=80476f74-7dca-4548-bf35-185ca8d45c13) * **Aetna Commercial and MED D:** [Aetna Compass - Guided Caller Authentication (064123)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a29fcb21-bff8-4fe4-a946-0dc700954fe0) |

[Top of the Document](#_top)

|  |
| --- |
| Close Open/Stuck Tabs |

The following are instructions to force close open/stuck case tabs and close any open interaction case that may prevent users from being able to continue working in Compass.

Complete the steps below:

|  |  |
| --- | --- |
| **Step** | **Action** |
| **1** | Navigate to the **App Launcher** (upper left side - 9 dots). |
| **2** | Type **“Close”** in the search field and then select **PBM Close Case Tabs**from the Items list. |
| **3** | Select **Close Tabs**.        **Result:** Cases are closed and only **Search New UI** screen displays.   * If no open interaction cases were open when **Close Tabs** was selected, **end process.** * If an open interaction case was open when **Close Tabs** was selected and now a new Interaction Case is trying to be accessed, proceed to the next step. |
| **4** | Click **Access the open case** from the “You already have an Interaction Case open” screen.    **Result:** Open Member Cases screen displays. |
| **5** | Click on the **Case hyperlink**.    **Result:** Open Interaction Case displays. |
| **6** | Click **Close Case** and proceed to Close the Case. Refer to [Close an Interaction Case](#_Interaction_Case_Call) section above as needed.    **Result:** **You already have an Interaction Case open…** screen displays. |
| **7** | Click **Next** to proceed to the New Interaction Case.    **Result:** User will proceed with Guided Authentication. Refer to the appropriate work instruction:   * **Commercial and MED D:** [Compass - Guided Caller Authentication (50163)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=80476f74-7dca-4548-bf35-185ca8d45c13) * **Aetna Commercial and MED D:** [Aetna Compass - Guided Caller Authentication (064123)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a29fcb21-bff8-4fe4-a946-0dc700954fe0) |

[Top of the Document](#_top)

|  |
| --- |
| Close a Research Case |

**Note:** A Research Case is read-only.

Perform the steps below:

|  |  |
| --- | --- |
| **Step** | **Action** |
| **1** | Locate and click the **Close Case** button in the **Case Data** section.   * If **Close Case** was selected in error, click the **X** on the **Close Case** windowto return to the member’s account.   **Note:** The Case Data section houses the **Close Case** button on all Compass screens. The Close Case button is available throughout Compass.    **Note:** No relationship to member or IVR Caller intent will display if it is a **Research** case.  **Result:** Close Casewindow displays. |
| **2** | Complete the **Case Comments** field to indicate the purpose of the Research activity. |
| **3** | Select **Close Case** to close the account once the call is completed.  **Results:**   * The case is closed. * The following confirmation message displays: “Success! The Case <#> has been closed successfully.”   The **Close Case** button closes the member’s entire account. |

[Top of the Document](#_top)

|  |
| --- |
| Entering Additional Documentation During the Call |

Perform the steps below:

|  |  |
| --- | --- |
| **Step** | **Action** |
| **1** | Click the **Edit Comment** button in the Case Data section.    **Result:** Edit Case Comments pop-up displays.    **Note:** Special characters will be saved exactly as entered and in the same order they are entered. |
| **2** | Click **Save** when finished.  **Note:** Clicking the **Cancel** button will close the **Edit Case Comments** window and will not save any new information that was added in the **Case Comments** field. |
| **3** | Throughout the call, repeat Steps 1-2 to add additional Case Comments, if needed. |
| **4** | When closing the call, click **Close Case**.  **Note:** The Case Comments entered throughout the call will be transferred to the Case Comments field in the Close Case window. Review the Case Comments in the Close Case pop-up prior to closing the call. |

[Top of the Document](#_top)

|  |
| --- |
| Close a Case Scenario Guide |

From the **Close Case** window, refer to the following scenarios as needed:

* [Reason for Closing Case is Interaction Completed](#_Toc145328193)
*  [Call ends before resolution and closing can be complete](#Callendsbeforeresolutionandclosing)
* [Reason for Closing Case is Transfer](#_Toc145328194)
* [A Support Task was created during the call](#_Toc145328195)
* [Additional Interaction Reason](#_Toc145328196)
* [A swivel to PeopleSafe was made during the call](#_Toc145328197)
* [Service Requests](#_Toc145328198)
* [Trending Events](#_Toc145328199)
* [Outbound Calls](#OutboundCalls)

|  |  |
| --- | --- |
| **Scenario** | **Action** |
| Reason for Closing Case is Interaction Completed | **Note:** If “Interaction Completed”is selectedas the **Reason for Closing Case**, the resolution question displays:  **Were we able to resolve your reason for contacting us today?**  Select “**Resolved” or “Not Resolved**” according to the caller’s answer.    **Note:** If the reason for closing case is anything other than Interaction Complete, the resolution question is hidden, and the answer is defaulted to no. |
| Call ends before resolution and closing can be completed | When closing an account because the caller disconnected, select the appropriate **Reason for Closing Case** and fill out the other fields as required.    **Note:** The CCR should refer to [Disconnected, Dropped, No Caller (Ghost Calls), Spam, Automated, and Looping Calls (021760)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=480af287-dcb8-4305-84c5-dfe8e0c39312) as needed. |
| Reason for Closing Case is Transfer | * If “Transfer” is selected as the **Reason for Closing Case**, complete the additional fields generated with the appropriate selections from the dropdowns.      * If “Other” is chosen from either drop-down menu, a required **Detail** field will populate. Manually document the reason for the transfer. |
| A Support Task was created during the call. | **Notes:**   * If a Support Task was created during the call, you will select “Interaction Complete + Task” as the **Reason for Closing Case**. This option is automatically selected if you have created one or more Support Tasks during the call. * The selection may be manually selected if needed. |
| Additional Interaction Reason | **Note:** If **Additional Interaction Reason** is selected from the drop-down menu, the **Additional Interaction Reason Detail** field populates and is required. |
| A swivel to PeopleSafe was made during the call. **Note:** This is only applicable to agents who have PeopleSafe access and training. | 1. Retrieve the 10-digit **Call ID** from PeopleSafe and paste it in the **PeopleSafe Call ID (CS\_ID)** field.      1. Complete the additional fields generated with the appropriate selections from the dropdowns.     **Note:** If a swivel is made to PeopleSafe, make the following selections when documenting the member’s account in PeopleSafe:   * **Disposition:** Research * **Form of Contact:** In House, Research |
| Service Requests | **Service Requests** are automatically captured, and document actions taken on an account.  **Note:** To show **Service Requests** captured during the call, navigate to the bottom of the Close Case window, then expand **Display Service Requests** by using the toggle button. This will not display if there are no Service Requests captured on the call. |
| Trending Events | **Only use this field when directed by a leader.** A leader or an announcement via theSource will inform users when it is appropriate to use **Trending Events**. |
| Outbound Calls | In the case of an outbound call to a member, **Reason for Outbound Call** dropdown will display in the **Close Case** window.    Select the most applicable option when displayed.  **Notes:**   * Outbound Call Campaign should only be used when directed by leadership. * Fill out all other fields as directed in [Close an Interaction Case](#_Interaction_Case_Call). * For Outbound caller authentication, refer to the appropriate work instruction:   + **Commercial and MED D:** [Compass - Outbound Guided Caller Authentication (066775)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a386ced-5dc4-4139-a0b3-9ceffb2431c9)   + **Aetna Commercial and MED D:** [Aetna Compass - Guided Caller Authentication (064123)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a29fcb21-bff8-4fe4-a946-0dc700954fe0) |

[Top of the Document](#_top)

|  |
| --- |
| Related Documents |

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

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

**Commercial and MED D:** [Compass – Guided Caller Authentication (050163)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=80476f74-7dca-4548-bf35-185ca8d45c13)

**Aetna Commercial and MED D:** [Aetna Compass - Guided Caller Authentication (064123)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=a29fcb21-bff8-4fe4-a946-0dc700954fe0)

[Top of the Document](#_top)

Not to Be Reproduced or Disclosed to Others without Prior Written Approval

**ELECTRONIC DATA = OFFICIAL VERSION / PAPER COPY = INFORMATIONAL ONLY**