# **PeopleSafe - Log Activity**

[High Level Process (HLP) Guide](#_Toc192565856)

[Process](#_Toc192565857)

[Auto-Documentation](#_Toc192565858)

[Log Activity Quick Guide](#_Toc192565859)

[Related Documents](#_Toc192565860)

**Description:** Steps for logging the root cause of the call using the Capture Activity and Log Activity screens. Call logging is crucial and is required each time a member’s account information is accessed for reporting and compliance purposes.

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| **High Level Process (HLP) Guide** |
| **1.** [**Determine**](#Determinethestatusofthecall) **the status of the call**   * [In Progress](#StatisINProgress) * [Complete](#StatusisComplete)   **2.** [**Review for Auto Documentation and or Log Activity**](#ReviewforAutoDocumentationandorLogActivi)   * If sufficient, no further action required. * If insufficient, add it to the Activity Log.   + [Disposition](#Disposition)   + [Activity Log Notes](#Activitylognotes)   + [Source of Contact](#SourceofContact)   + [Form of Contact](#FormofContact)   + [Contract Type](#ContractType) |

[Top of the Document](#TopofDoc)

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| **Process** |

Any person accessing the account should be able to view the documentation and fully understand the issue.



* If more than one account is accessed during a call, both accounts must be notated.
* Each time that an account is accessed for call taking purposes (Incoming Phone Call or Outgoing Phone Call), documentation in **Capture Activity Log Notes** **must** occur. Some notes will occur thru [Auto Documentation](#AutoDocumentation).
* Refer to [Universal Care – Consultative Call Flow Process (095822)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c954b131-7884-494c-b4bb-dfc12fdc846f) for documenting the call.

 Activity Log Notes can be entered on either the Capture Activity Screen during the call or Log Activity Screen after the account is closed.

Perform the steps below to log notes for a call:

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| **Step** | **Action** | | | | |
| **1** | Determine the status of the call. | | | | |
| **If the call is…** | **Then...** | | | |
| In progress | Do **not** use the functionality in the **View Comments** screen to document the member’s account. Refer to[Log Activity/Capture Activity Codes](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bdac0c67-5fee-47ba-a3aa-aab84900cf78) (005164). | | | |
| Complete | Log out of the member’s account without logging out of PeopleSafe and select the  button on the  tab **or** select  on the **Main Screen.**  **Result:** Log Activity screen is displayed.  **Note****:** For Medicare D HealthPlan and BlueMedicareRx (NEJE) clients,the Grievance Questionnaire is displayed. Proceed to Step 8. | | | |
| 1. Review for Auto Documentation and/or log activity.   Icon - Important If no activities have been [Auto Documented](#AutoDocumentation), select the  sign to log the appropriate activity code(s) about what the caller stated.   * For a quick reference of activities that are documented automatically by PeopleSafe versus. those that are not, refer to the [Log Activity Quick Guide](#Log). * For a list of current activity codes, refer to [Log Activity/Capture Activity Codes](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bdac0c67-5fee-47ba-a3aa-aab84900cf78) (005164).   Customer Care **does not** add the providers NPI/NCPDP number in the NPI box.   * All NPI numbers are added to the Activity Log Notes.   Graphical user interface, application  Description automatically generated  **Log Activity Screen**  **Alternative:** Type the speed code in the Activities box and press **Tab** or click **Include**.  Refer to [Log Activity/Capture Activity Codes (005164).](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bdac0c67-5fee-47ba-a3aa-aab84900cf78)  A screenshot of a computer  AI-generated content may be incorrect. OR A screenshot of a computer  AI-generated content may be incorrect. | | | | |
| **2** | 1. Log the appropriate **Disposition**.    * Most calls will be dispositioned as Education.    * Calls resulting in a transfer should be dispositioned as Transfer.    * Calls resulting in an escalation to the Senior Team, or a supervisor should be dispositioned as Escalation.   C:\Jen's Stuff\Subcommittee Stuff\Icon_-_Important_Information.png Do **not** disposition calls as SRT Job Asst, SRT Proc Asst, SRT ONLY Esc, or ERU/Case Coordinator.   1. Verify all Disposition fields prior to exiting the members account on each call.   **Exceptions:**   * If the call is transferred after HEE presentation and enrollment, disposition as **Education**. * **MED D Only:** First Call Resolution Grievances disposition as Education, Transfer, or Escalation and Form of Contact would be Incoming Phone Call.   **Note:** In some cases, the wrong account is accessed or there may be a need to access multiple accounts over the course of a single call. The bulk of notes, log activities and other documentation should be logged all at once, typically the last or most “significant” access to the member’s account. All other sessions should be logged as **Research**.  When using the Capture Activity button, additional codes may need to be added later in the call, however; do **not** select the Disposition until you are sure the conversation with the member is completed.  **Note:** PeopleSafe displays the Log Activity screen when exiting the member’s profile if the Disposition field has not been selected and saved using Capture Activity during the call.  Icon - Important After a disposition is chosen, the Form of Contact no longer automatically populates, and you must manually ensure it is accurate.  A screenshot of a computer  AI-generated content may be incorrect. | | | | |
| **Disposition Type** | **Used…** | | | |
| EDUCATION | When you have assisted a caller in the correct account without transferring while the caller is on the line. | | | |
| ESCALATION | When you have warm transferred a caller to the Senior Team as an escalation. | | | |
| TRANSFER CALL | When you have transferred the call to another department (Clinical Care, Senior Team, etcetera.).  **Note:** When you have transferred the call to any area; including the use of Cold transfers, change the disposition back if needed on the next call. | | | |
| TSK SENT TO QUE | **CCR:** Do not use. | | | |
| REACH OUT | When you have completed an outbound call or email to a member, not in response to a previous inquiry. | | | |
| ADOPT A CUSTOMR | **CCR:** Do not use. | | | |
| RESEARCH | When you have entered the incorrect account and are utilizing a UID to assist a member.  or  If you are completing research prior to following up with a member without someone on the line.  If selecting Research as your Disposition, change the Form of Contact as the system does not automatically make this selection. | | | |
| FOLLOW-UP | Contacting the member with a question or resolution after a previous interaction/inquiry. | | | |
| SRT JOB ASST | **CCR:** Do not use | | | |
| SRT PROC ASST | **CCR:** Do not use | | | |
| SRT ONLY ESC | **CCR:** Do not use | | | |
| ERU/CASE COORD | **CCR:** Do not use. | | | |
| **3** | * Copy and Paste the Cresta generated call summary notes to PeopleSafe.   Do not revise the auto generated notes before copying and pasting them to PeopleSafe.   * After selecting “**Capture Activity**” button, paste the Call Summarization Notes from Cresta tool in the Activity Logs Notes: box.   Each time a PeopleSafe account is accessed for call taking purposes (Incoming Phone Call or Outgoing Phone Call), documentation in View Activity Comments **must** occur. If a person accessing the account would not fully understand what happened from the Auto-Documentation and Speed Codes, then enter written notes to clarify.  **Example:** When sending a New Rx request, the system displays that a request was started, it does not state which medications were requested, Providers NPI/NCPDP etcetera.  **Reminder:** Review the CIF to verify client specific instructions.  A screenshot of a computer  AI-generated content may be incorrect. | | | | |
| **4** | Review the **Source of Contact** field and make changes if needed. The selection should describe the caller type.   * If the Source of Contact is not located in the list, then select **MEM/DEP**.   **Examples:**   * Select **Client** when a Client calls but does not transfer the member. * Select **MEM/DEP** when a Client calls and transfers the member. * Select **Prescriber** when a Prescriber or a representative from their office calls.   **Note:** This field defaults to the selection made on your most recent call.  A screenshot of a computer  AI-generated content may be incorrect. | | | | |
| **Source of Contact** | **Used For…** | | | |
| MEM/DEP | When a Member calls for themselves, or for a dependent who is a minor | | | |
| CLIENT | When the benefits office or internal Client Services team calls on a Member’s behalf | | | |
| MOR PHARMACY | When a Mail Order pharmacy, including CVS Caremark Specialty and Caremark Pharmacy Help Desk, is calling | | | |
| PRESCRIBER | When a Doctor’s office, clinic, hospital or health care facility is calling | | | |
| RETAIL PHARMACY | When a retail pharmacy is calling | | | |
| CMRK ACCT MANGR | Account Management Only | | | |
| LEGAL OFFICE | Veterans’ Administration (VA) / Department of Defense (DOD) Calls | | | |
| STATE BOARD | Medicaid Veterans’ Administration (VA) / Department of Defense (DOD) Calls | | | |
| SPOUSE | When a spouse is calling on behalf of a membe. | | | |
| POA | When the Power of Attorney on file has called in to speak for the member (If the POA is not on file with Caremark, use AOR.) | | | |
| VERBAL AUTH MBR | When the Member turns over the call to a third party whom they verbally authorize to speak on their behalf | | | |
| AOR | When contacted by an AOR (Appointment Of Representative) or other party formally authorized to speak on Member’s behalf  This includes callers who identify themselves as the POA, but who are not listed in the Member’s account as such | | | |
| TRAINING | Not used for live calls, only used for training when accessing accounts | | | |
| **5** | Review the **Form of Contact** and make changes if needed.  **Note:** The selection should describe the method by which the contact was made.  Icon - Important Your choice in the Form of Contact section will not change from one call to the next. When there is a need to change the form of contact for a particular call type, update it on the next call.  **Note:** This field defaults to the selection made on your most recent call.  A screenshot of a computer  AI-generated content may be incorrect.  **Note:** If you change your Disposition, verify the Form of Contact is correct. It may reset back to the last choice you used again if you modify the Disposition after changing Form of Contact. | | | | |
| **Form of Contact** | **Used for accessing the account to/for…** | | | |
| INCOMING, LETTER | Respond/research an incoming letter from the member | | | |
| INCOMING, FAX | Respond/research an incoming fax from the member | | | |
| INCOMING, PHONE CALL | Assist/research an incoming phone call from a member or member advocate | | | |
| INCOMING, EMAIL | Respond/research an incoming email from a member | | | |
| INCOMING, SURVEY FOLLOWUP | Respond/research a survey response and follow up | | | |
| INCOMING, CHAT | When contacted using a live chat feature | | | |
| OUTGOING, LETTER | Draft and send a letter to the member/POA/AOR or prescriber | | | |
| OUTGOING, FAX | Draft and send a fax to the member/POA/AOR or prescriber | | | |
| OUTGOING, PHONE CALL | Contact the member/POA/AOR /prescriber/pharmacy via outbound call | | | |
| OUTGOING, EMAIL | Contact the member via email | | | |
| OUTGOING, SURVEY FOLLOWUP | Respond/research a survey response from a member and follow up via phone call | | | |
| IN HOUSE, RESEARCH | In-house research only | | | |
| IN HOUSE, FOLLOW UP | Follow up in house without any external outreaches | | | |
| IN HOUSE, TRAINING | Not used for live calls, only used for training purposes | | | |
| **6** | Determine if the**Contract Type** fieldin the **Log Activity** and/or **Capture Activity** screens is viewable.  **Note:** This field is only enabled for certain clients.  A screenshot of a computer  AI-generated content may be incorrect.  A screenshot of a computer  AI-generated content may be incorrect. | | | | |
| **If…** | **Then…** | | | |
| No | Continue to Step 7. | | | |
| Yes | Log appropriate Contract Type based on the location that the claim was about (**Example**: Retail versus Mail).   * Mail * Retail * Specialty * Clinical PA   **Note:** This field does not default to the user’s last call selection. If this field is enabled, manually select a value when logging these calls. | | | |
| **7** | Click the **Save** button to exit the screen.  **Notes:**   * If using the Capture Activity screen, click **Save**, **Save & Exit Account**, **Close** or click away from the screen. * For accounts that have minimum notation requirements; Save & Exit is available to close out of the account once the minimum documentation requirements have been completed on the Capture Activity screen. Until the minimum documentation is completed, the button appears grayed as below. * For Medicare D HealthPlan and BlueMedicareRx (NEJE) clients,the Grievance Questionnaire is displayed. Proceed to Step 8.   A screenshot of a computer  AI-generated content may be incorrect. | | | | |
| **8** | For MED D HealthPlan and BlueMedicareRx (NEJE) ONLY: Determine if a Grievance needs to be filed.  Repeat this process as needed for multiple Grievance scenarios. | | | | |
| **If...** | | **Then…** | | |
| A Grievance does not need to be filed.  **Examples:**   * Client handles own grievance(s) * Already submitted during the call * Call was transferred to another team | | 1. Select **No**. 2. Select **Continue** (or **OK** if beginning from the **Capture Activity** screen).   **Result:** The Call Activity Screen displays.   * + Complete all required fields. **Note:** The Activity Log Notes field has a minimum of 25 characters. | | |
| A First Call Resolution Grievance **or** Unresolved Grievance needs to be filed | | Select **Yes**.  **Result:** Grievance Not Resolved/Resolved Same Day Grievance options display.  A screenshot of a computer  AI-generated content may be incorrect. | | |
| **If...** | **Then...** | |
| Grievance Not Resolved | Is the Grievance already filed? | |
| **If...** | **Then...** |
| Yes  **Examples:**   * Already submitted during the call * Previous Grievance already on file | 1. Select **Continue** (or **OK** if beginning from the **Capture Activity** screen).   **Result:** The Call Activity Screen displays.   1. Complete all required fields.   **Note:** The Activity Log Notes field has a minimum of 25 characters. |
| No | A pop-up displays, instructing the CCR to go to the **Grievance** tab to file the Grievance.  A screenshot of a computer error  AI-generated content may be incorrect.  Proceed with filing an [Unresolved Grievance MED D - Grievances in PeopleSafe for Health Plans, JE (formerly MHK Fusion)(040884).](file:///C:\Users\DDavis6\AppData\Local\Microsoft\Windows\INetCache\Content.Outlook\NOWJ7WIO\TSRC-PROD-040884) |
| Resolved One Day Grievance | Is the One Day Grievance already filed? | |
| **If...** | **Then...** |
| Yes  **Examples:**   * Already submitted during the call * Previous Grievance already on file | 1. Select **Continue** (or **OK** if beginning from the Capture Activity screen).   **Result:** The Call Activity Screen displays.   1. Complete all required fields. **Note:** The Activity Log Notes field has a minimum of 25 characters. |
| No | A pop-up displays, instructing the CCR to go to the **Grievance** tab to file the Grievance:  A screenshot of a computer  AI-generated content may be incorrect.  Proceed with filing an [First Call Resolution Grievance - MED D - Grievances in PeopleSafe for Health Plans, JE (formerly MHK Fusion (040884)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=731c1bac-3039-46da-85e1-0e49a8c9721d). |

[Top of the Document](#TopofDoc)

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| **Auto-Documentation** |

Auto-Documentation is a feature that automatically documents actions taken on a member’s account. For example, address, email, and phone number changes are documented automatically, eliminating the need for the CCR to log notes about these changes.

* It reduces the time spent logging account changes or detailed call notes. While the system will take care of documenting many routine actions, it does not track everything.

**** Documentation in the Capture Activity log Notes must occur for all calls if the Auto Documentation does not provide all the details of the call. For a quick reference of activities that are documented automatically vs. those that are not, refer to the [Log Activity Quick Guide](#Log).

* + For most RM Task types, an activity/speed code is automatically selected by the system and the open task is visible on the View Activity screen. If a speed code is not automatically selected, choose the appropriate activity code for the call/issue.
  + Use log codes or notes about some topics, such as referring to other departments for resolution, escalated/complicated issues, and plan-specific questions such as quantity limitations and prior authorization.
  + If a person accessing the account would not fully understand what happened from the Auto-Documentation and Speed Codes, then enter written notes to clarify.

**Example:** When sending a New Rx request, the system displays that a request was started, however it does not state which medications were requested, etcetera.

* Auto-Documentation is visible on the **View Activity** screen, and it displays RM tasks, Activity Notes added by CCR’s and automated outbound calls made to the member.

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AI-generated content may be incorrect.

**View Activity Screen**

By default, the screen displays three-line items per event. If more activities were recorded, then “More Activities” displays on the third line.

To view additional activities, click the **Expand All** button, and the additional activities displays.

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AI-generated content may be incorrect.

**View Activity Screen Expanded**

**Tip:** View a list of Auto-Documentation events within the Log Activity or Capture Activity screen. The information on these screens is an abbreviated version of the Auto-Documentation visible within the View Activity screen.

* Allows for quick review of the list to determine which additional log activity codes need to be selected, if any.
* When a colon (:) is listed after the entry, this indicates that more details are available on the Auto-Documentation screen.

In the below example, “Test Claim:” and “Add Address:” are displayed on the Log Activity screen to serve as a quick reminder that these actions were performed during the call. The full details, such as which address was added and for which drug the test claim was run, will be tracked on the View Activityscreen.

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AI-generated content may be incorrect.

**Capture Activity Screen**

A screenshot of a computer

AI-generated content may be incorrect.

**Log Activity Screen**

[Top of the Document](#TopofDoc)

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| **Log Activity Quick Guide** |

**Reminder:** Select the appropriate **Disposition, Source of Contact,** and **Form of Contact** for each call.

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| **Form of Documentation:** | **Activities:** |
| **Automatically** documented by PeopleSafe | **Maintenance Activities:**   * Address, email, phone number updates * Updating Messaging Preferences (MP) * Electronic payment account updates: Credit card, electronic check   **Mail Service-related activities:**   * Order Placement (Refills and New Rx requests)   **Note:** New Rx request documentation in View Comments does **not** display which medications were requested until FastStart begins the request. Notes should be entered into the comments.   * Applying a payment or creating an adjustment * Order Status screen canceling orders or prescriptions * Refill Status screen canceling or editing an order * ReadyFill at Mail changes (also known as Automatic Refill Program in theSource) * Placing orders or prescriptions on hold * Expediting orders * Discontinuing a prescription * Checking eligibility for a Short Term (Bridge) Supply * Prescription transfers, using MChoice Transfer and Create Opportunity buttons * Test Claims   **Plan Benefit Overrides:**   * Adding, updating, or voiding a PBO   **Resolution Manager Tasks:**   * Any actions associated with RM tasks |
| **CCR needs to document** | * The Cresta generated call summary displays. Copy and paste the Cresta generated call summary notes to PeopleSafe.   Do not revise the auto generated notes before copying and pasting them to PeopleSafe.   * After selecting “Capture Activity” button, paste the Call Summarization Notes from Cresta tool in the “Activity Logs Notes:” box. Refer to [Cresta Functionality and Processes (067901)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f28dbdf4-4355-45be-95c4-6bda1c08a521). |
| Other – These are **not auto-documented** and do not have a quick code. Enter notes for these situations. | * Full or partial IVR Authentication * Adding a Maintenance Choice Opt Out (Member and individual drug level) * Requesting a SOC (Statement of Cost) * Faxing the member, a list of network pharmacies (remember they can find this on Caremark.com in many cases) * Viewing the HEE (Health Engagement Engine) Opportunities and updating opt out preferences * Reversing Claims * Viewing various screens throughout PeopleSafe for example:   + Account Balance   + Caremark.com   + Client Financials   + Client Program Offerings   + Communication History   + FSA/HSA/HRA History   + Order Status   + Plan Benefit Override   + Pharmacy Financials   + Pharmacy Network   + Plan Summary   + Prescription Details   + Opportunities (HEE)   + PA Status   + Prescription Version |
| Indirectly Captured | Transfers to Clinical, Senior Team, Bridge Supply, dedicated Care Teams because these groups use PeopleSafe too and will log their calls. |

[Top of the Document](#_top)

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| **Related Documents** |

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

[Universal Care – Consultative Call Flow (095822)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c954b131-7884-494c-b4bb-dfc12fdc846f)

[Cresta Functionality and Processes (067901)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f28dbdf4-4355-45be-95c4-6bda1c08a521)

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

[Top of the Document](#_top)

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