# Medallia (MyCustomer Connection) Log In Procedures

[Adding Medallia to My Apps](#_Toc195686111)

[Opening Medallia from My Apps](#_Toc195686112)

[Setting Filters](#_Toc195686113)

[Related Documents](#_Toc195686114)

**Description:** Used to access and log into Medallia (MyCustomer Connection).

|  |
| --- |
| Adding Medallia to My Apps |

Perform the steps below:

|  |  |
| --- | --- |
| **Step** | **Action** |
| **1** | Access **Heartbeat**, then click on **Apps and Tools**.  **Note:** Refer to <https://heartbeat.cvshealth.com>. |
| **2** | Locate and click on **My Apps**. |
| **3** | Click **Select My Apps** at the top right.  Graphical user interface, text  Description automatically generated |
| **4** | Click the search bar at the bottom of the screen and search **MyCustomer Connection**.  **Note:** Search for mycustomer without a space.  Graphical user interface, application  Description automatically generated |
| **5** | Click the checkmark next to **myCustomerConnection** and click **Save**.    **Result:** The app should display under MyApps on the home page of Heartbeat. |

[Top of the Document](#_top)

|  |
| --- |
| Opening Medallia from My Apps |

Once Medallia is saved to My Apps, perform the steps below to open:

|  |  |
| --- | --- |
| **Steps** | **Actions** |
| **1** | On the home page of Heartbeat, click **MyApps** and then select **myCustomer Connection** tab.  *Diagram  Description automatically generated* |
| **2** | Input your Username and Password.  **Note:** This will be your C number and Windows password.    **Note:** If you have previously signed in on the same day, this step will not display.  **Result:** The Overview Mail Pharmacy Landing Page displays. |

[Top of the Document](#_top)

|  |
| --- |
| Setting Filters |

Filter are required to view Medallia surveys.

To set a filter, perform the steps below:

|  |  |
| --- | --- |
| **Steps** | **Actions** |
| **1** | Locate and click on your name in the upper right-hand corner of the screen. |
| **2** | Click on the **User Role** drop down.  **Result:** Displays additional options. |
| **3** | Click on **[PBM] CSR.** |
| **4** | Click on **Customer Care** located in the top toolbar. |
| **5** | Select the **filter icon** on the right-hand side of the screen.    **Result:** On the left-hand side, a list of different filter categories displays. |
| **6** | Click the **+** symbol next to **PBM agent**.  Graphical user interface  Description automatically generated with medium confidence |
| **7** | 1. Type your name in <last name, first name>.   **Result:**  Your name should display in the list.     1. Select your name from the drop-down list.   **Note:** The Time Period is automatically set to the past 30 days as default. If you have not had any surveys in the last 30 days, your name will not display in the list and you need to change the Time Period to view your surveys.    **To Change Time Period:**   * Click the **Time Period** drop down menu and select **Last 13 Months to Date.**   Graphical user interface, text, application  Description automatically generated   * Input your name in the **[PBM] Agent** field and select your name from the dropdown menu. |
| **8** | Click the **Save Filter** button on the bottom right-hand corner.  Graphical user interface, text, application, chat or text message  Description automatically generated  **Result:**  A pop-up box displays.  Name the filter and click **Save**. This makes finding your surveys easier in the future.  Graphical user interface, text, application, chat or text message  Description automatically generated |
| **9** | Click the **Run** button.  Graphical user interface, text, application, chat or text message  Description automatically generated  **Result:** This populates all surveys for you during the time period you selected. |

[Top of the Document](#_top)

|  |
| --- |
| Related Documents |

[Log Activity / Capture Activity Codes (005164)](https://thesource.cvshealth.com/nuxeo/thesource/" \l "!/view?docid=bdac0c67-5fee-47ba-a3aa-aab84900cf78)

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

**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)

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

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