# **Compass - Member Journey**

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**Description:** Provides guidance on the use of the Member Journey feature, which provides an easy-to-read vertical timeline of the members’ detailed interactions with CVS. While this feature is similar to Case History it is not a replacement for checking the Case History.

 Currently only PBM information for Caremark is displayed. More functionality is in development.

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| **Process** |

This is not a replacement for reviewing the Case History to view the comments entered by the agents. Access the Case History by selecting the Case# hyperlink. This is meant to show a fuller picture of the members’ interactions with CVS. Complete the steps below:

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| **Step** | **Action** |
| **1** | Access the **Quick Actions** panel of either the Member Snapshot Landing Page, **or** the Claims Landing Page, **Member Journey** can be selected.    **Member Snapshot Landing Page:**    **Note:** Member Journey can also be accessed from Member’s Recent Cases panel by selecting **View All Family Cases** to display all family interactions.      **Claims Landing Page:**    **Note:** If there are more than three (3) interactions (including the current interaction) within the last 7 days, there is a  **map** action icon that will display next to the Member Journey link in the Quick Actions panels.  **Quick Actions Panel on the Member Snapshot Landing Page:**    **Quick Actions Panel on the Claims Landing Page:** |
| **2** | Use the **View by Member or Family**dropdown to filter interactions by **Member in Session** or **Family**.  **Result:** Compass will default the drop down to display Member in Session, Relationship to Cardholder, and Person Code.  **Family** Interaction Types will be defaulted to **Chat**, **Email** (Secure Message), **Inbound Call**, **Outbound Call**, **Offline Interaction**, and **Research**. Other options will be disabled when family is selected.  Select a timeframe in two different ways.   1. **Show Last** drop-down selections (defaults to one (1) week):  * 30 days * 60 days * 90 days * 6 months * 2 years   or   1. **Date Range** allows manual selection of the Date Range (Maximum of two (2) years) using the calendar icons in the applicable fields.   **Notes:**   * A start date greater than two (2) years from today’s date will not display. * If a date older than two (2) years is selected for either the Start Date or End Date, the following message will display: “You cannot input a date earlier than <today’s date - 730 days>.” * If a future date is selected for either the Start Date or End Date, the following message will display: “Date must be equal to or less than today’s date.”       **Member in Session View Family View** |
| **3** | Use the Interaction Types to filter the type of interaction needed to review (or select all) then click **Apply**.  **Interaction Types** checkboxes (defaults to **Select All**) for **Member in Session** with icon descriptions:   * Automated Outbound Calls  - Phone with sound emanating. * Chat  - Chat bubble with three (3) dots. * Digital Communications  - Sheet of paper with pen in the middle. * Email (Secure Messaging)  - Envelope in a circle. * Inbound Call  - Phone with arrow pointing toward the phone. * Mail Order - Box with barcode inside. * Offline Interaction -- Offline indicator with an X (No Active Call). * Outbound Call  - Phone with arrow pointing away from the phone. * Research  - Record Lookup - magnifying glass on a clipboard.     **Member in Session View Family View**  **Notes:**   * **Interaction Types** checkboxes for **Family** will default to:   + Chat   + Email (Secure Messaging)   + Inbound Call   + Offline Interaction   + Outbound Call   + Research * The following buttons will cancel or apply filter selections as follows:   + **Reset** button - will reset filters to default.   + **Apply** button - will apply selected filters.   **Result:** Interactions are displayed on the right side of the screen. |
| **4** | Click the **chevron arrow** to expand the **Interaction Header** to view the Time and Date of the interaction, Member Name with Person Code, Primary Interaction Reason, and Case #.  The following details display:   * **Type -** Interaction type, including Senior Team information. * **Status -** Case Status. * **Case Comments.** * **Support Tasks** - Tasks will display as a hyperlink including the Type (Normal/Escalated) that opens the Case Details tab. * **Service Request Actions.**   **Example: Member in Session View**    **Notes:**   * **Interaction Type** icons that display will correspond with the **Interaction Type** filters selected. * If **Family** is selected from the **View by Member or Family**dropdown, the **Interaction Header** will include theTime and Dateof the interaction, Member Name with Person Code, Primary Interaction Reason, and Case#.     **Example: Family View** |
| **5** | Select **Case#** hyperlink to view Case details and Service Requests.    **Result:** Case Details tab will open for selected case. |

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| **Scenario Guide** |

Refer to as needed:

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| **Scenario** | **Action** |
| Conducting Wellness Check | Access the Member Journey page to review past interactions on the account.  **Note:** This helps to understand the full timeline of the events that have led to the call and to quickly decide the best next steps.  Use the case hyperlink to check the case comments. |
| Member received a call from us and does not know why | Utilize the Member Journey to search for outbound calls made within the timeframe that the member states they received the call.  Use the chevron arrow (to the left) to expand the details of each interaction.  **Note:** Able to use the case hyperlink to check the case comments. |
| Member states they have called multiple times | Utilize the member journey to help determine, along with probing questions, if they are calling about the same reason they have called about previously or for something new.  This will help decide if the call is a repeat call or not. |
| Member states they are calling about an order they previously placed | Utilize the Member Journey to help quickly determine cases that may have been related to that order, such as Order Placement calls or Order Status calls.  Click the Case# hyperlink to read additional information from that case to best decide the next steps. |

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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" \t "_blank)

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

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