# PeopleSafe - Viewing and Adding Comments

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**Description:** Documentation is required each time a member’s account information is accessed. Users can add Notes and Activity Codes during the call automatically inside the **Capture Activity** screen and after the call using the **Activity Log Notes** Screen. Not applicable to Medicare D.

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| **High Level Process (HLP) Guide** | |
| 1. [**Determine**](#DetermineReasonforCallandaccessmemberacc) **the reason for the call and access the member’s account.**   Review the Stop See Comments pop-ups, if any. | **Note:** For comments older than three (3) years, resolve members concerns and contact the [Senior Team](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9eef064d-c7d7-42f7-9026-1497496b4d51) (016311), |
| 1. [**Add or View**](#ViewAddComments) **Comments**  * [**Order**](#OrderLevel) * [**Member**](#MemberLevel) * [**Prescription**](#PrescriptionLevel) |  |
|  |  |
| 1. [**Log**](#LogActivity) **Activity** |  |
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| View or Add Comments |

Use a professional tone when writing notes/comments in PeopleSafe**,** do **not** include:

* Profane language
* Personal opinions
* Judgments about the caller
* Information that does not relate to the issue at hand

Icon - Important If PHI (drug name, Rx number, etcetera.) needs to be input, these comments **can** be input under the member’s account from the **Capture Activity** button. **Do not** use the **View Comments** screen to document the member’s account.

Perform the steps below:

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| **Step** | **Action** | |
| **1** | 1. Determine the reason for the call. 2. Access the member’s account. 3. Review the Stop See Comments Pop-ups prior to viewing comments.     **Note:**  Stop See/High Priority comments display when a profile is accessed.  **ONLY** Stop See Comments will stop an order from being processed. High Priority comments may be displayed upon account being accessed, but **do not** affect the processing of an order. | |
| **2** | 1. From the PeopleSafe Main screen, select **View Comments**.     **Result:** View Comments screen displays.   1. Place a checkmark in the Internal and External field boxes.   **Notes:**   * If the account has multiple members, you can modify how comments are viewed by selecting **Family** or **Participant**.      * Family View displays all participants (members), orders/claims, and prescriptions.      * Participant View displays all members; however, only relevant prescriptions and orders are listed for the member that was selected from the drop-down list located at the top of the Main Screen in PeopleSafe. | |
| **3** | Click on the “**Type”** drop down list to select a person or order to view or add comments. This allows you to attach a comment to a specific person on the account (spouse, child, etcetera) which can then be viewed individually by choosing them from the list later. | |
| **To** **Add or View Comments at…** | **Then…** |
| **Order Level** (something to do with the actual order)  **Note:** If member has specific request (**Example:** Specific manufacturer, brand preference) for an order or prescription, refer to [Stop See/High Priority comments](#_Stop_See_/) in this document. | Select the order number from the drop-down box.  **To view Comments:**  Click on the (**+**) next to the desired note and select **Expand** button.  **Alternate Option to view Comments for Mail Order**:  **Note:** Point of Sale claims do not have order numbers; refer to [Prescription level](#PrescriptionLevel) on how to view and add comments for specific prescriptions.   1. In PeopleSafe, below the Mail Tab on the Main Screen, access Order Level comments by clicking on **Order** number hyperlink.        1. Select **Order Level Comments** at the bottom of the Order status page to view comments.     **To add comments:**  Click on **Add Comments** then add the clear and concise information in the Detail field and select **Save**.  [Return to HLP Guide](#HighLevelProcess) |
| **Member Level** (something to do with the member individually) | 1. Click on the **drop-down list** to view the members’ names.      1. Locate and click on the **appropriate member’s name**.     **To view comments:**  Select **View Comments** on PeopleSafe Main screen then click on the (**+**) next to the desired note and then select **Expand** button.    **To add comments**:  **Member Level Comments are captured by utilizing:**   1. Select the **Capture Activity** button (lower left)  on Main Screen in PeopleSafe. 2. Copy and Paste the Cresta generated call summary notes to PeopleSafe. 3. After selecting **Capture Activity** button, paste the Call Summarization Notes from Cresta tool in the **Activity Logs Notes**: box and select **Save**.     **Note:** Do not revise the auto generated notes before copying and pasting them to PeopleSafe.      **Note:** If the system does not auto document a member interaction/issue, it is the CCR’s responsibility to add this information to the notes/comments. Refer to [Log Activity/Capture Activity Codes](#LogActivity).  Icon - Important If comments contain PHI (drug name, Rx number, etcetera) enter that information under the member’s account from the **Capture Activity** button. Do not use the View Commentsscreen to document the member’s account.  [Return to HLP Guide](#HighLevelProcess) |
| **Prescription Level** | 1. Locate the Prescription on the **Main** screen and select the Rx Number blue hyperlink.     **Results:** Displays the prescription.   1. Click the **View Comments** button at the bottom of the screen.     c. Select the appropriate prescription number from the Type drop-down list then click the **Search** button.    **Note:** Only the appropriate prescription and order number should be displayed in the drop-down list.   * If comments exists, then the appropriate comment displays.      * If there are no prescription level comments, then the following pop-up displays:     **Or**  Access the PeopleSafe Main screen, make sure you are in the correct member’s account and select the **View Comments** button at the bottom of the screen then select the appropriate prescription number from the Type drop-down list. |

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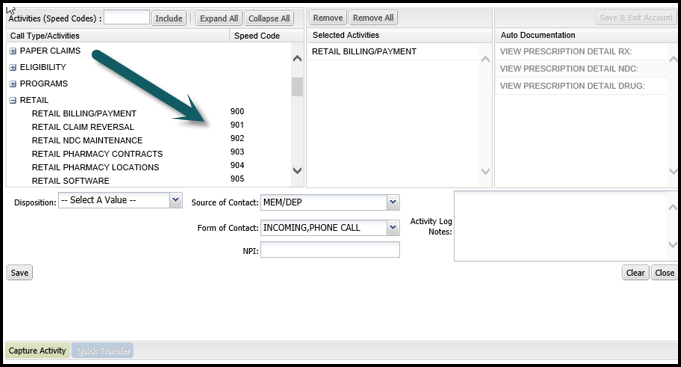
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| Log Activity / Capture Activity Codes |

Some actions in PeopleSafe will be auto documented by the system, for **Example**:

* Address Maintenance
* Refill Orders
* New Rx Requests

At the end of a call, review the information that was automatically documented and add more details if needed based on the nature and outcome of the call.

1. Select **Call Types/Activities** which displays revelent activity in the **Selected Activities** field then review the Auto Documentation.
2. Add Activity Log Notes as needed. Refer to [Log Activity/Capture Activity Codes](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=bdac0c67-5fee-47ba-a3aa-aab84900cf78) (005164) using the [Log Activity (042891)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=08023401-0eee-4e2b-97fe-f0bc7c5aa2f0) work instruction as a guide.





* If the system does **not** auto document the member interaction, it is your responsibility to add this information to the notes/comments.
* Escalated calls or any unique situations must be documented in the notes/comments. Call the [Senior Team](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9eef064d-c7d7-42f7-9026-1497496b4d51) (016311) for an escalation **after** you have offered all possible options to a customer on an issue.

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| Stop See / High Priority Comments (HPC) |

* Temporary Stop See Comments can be input by a CCR. Refer to [Stop See Comments](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=6a481d2d-cc6d-40f0-af30-1858db02b7a4) (007009).
* High Priority Comments contain details that supplement information in the CIF and can be related to specific plan members.

 **High Priority** and **Extended** Stop See comments are created by the Senior Team and Clinical Care. Refer to **Procedural** section of the [When to Transfer Calls to the Senior Team](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=9eef064d-c7d7-42f7-9026-1497496b4d51) (016311).

**Example** (Extended Stop See Comment)**:** Member is requesting contact before any medication is shipped.

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| Related Documents |

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

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

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