

## SCO Grievance Note Template

To add a Grievance note:

1. From inside the Member's File, click the + icon, select "Work", and "Activity Log."



2. For Activity Type, select "Grievance Note"
3. In Notes, right click and select Standard Text → SCO CM → Grievance Note.
  - a. **Date of Assessment:** [Provide date and time of complaint/request.]
  - b. **Brief Overview:** [Detail who is requesting or grieving, what the request/grievance is, and where the conversation is taking place. Also document when this event occurred, what they want to happen, and why they want that resolution. Finally, describe what solutions have been tried/offered, and with what result.]
  - c. **Actions Taken:** [Grievance emailed to A&G Coordinators Team; member advised to contact Customer Relations at 1-855-670-5934 to handle an associated Organization Determination Request (if applicable)]
4. Click and drag any attachments to the Attachments area, if necessary.

