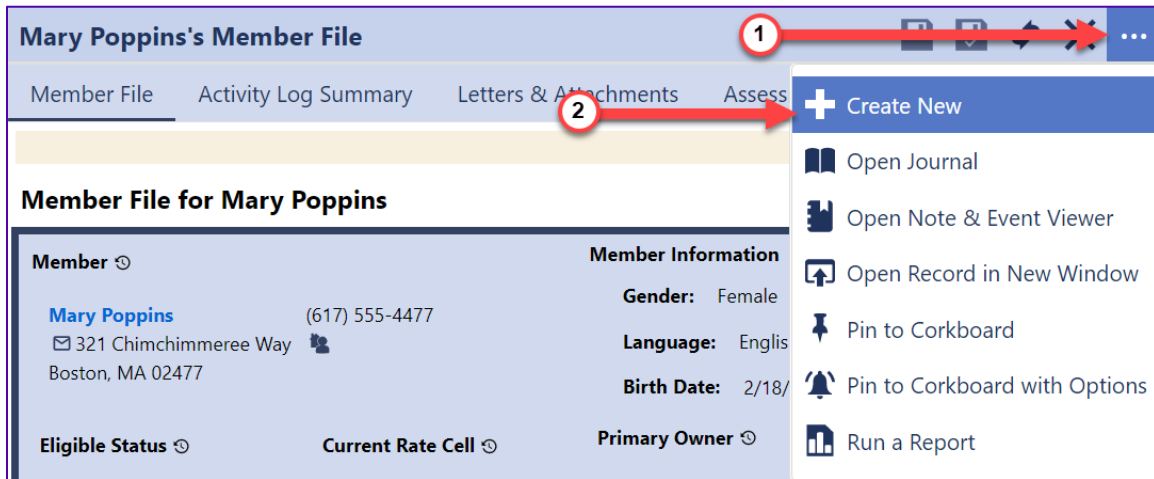
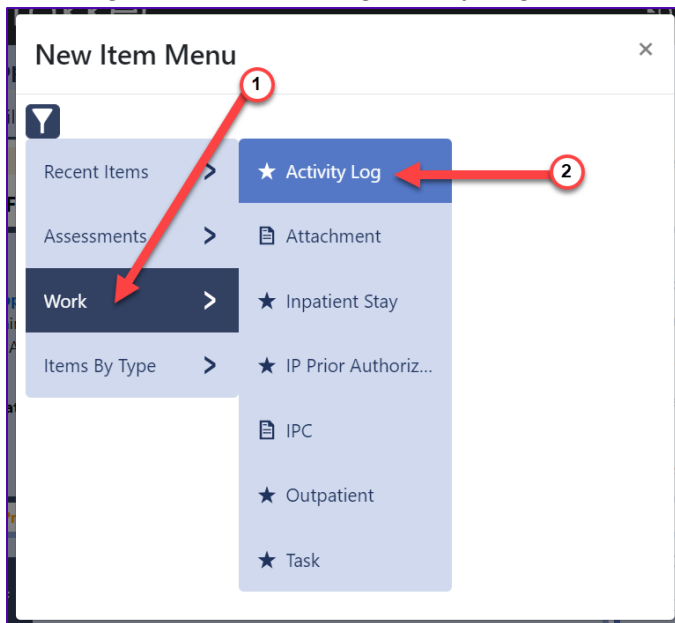



To document a member grievance in CaseTrakker, begin by creating an **Activity Log**:

1. In the Member File, click , then click .

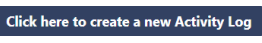

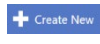



2. The New Item Menu will appear in a popup window. Activity Logs can be found quickly by selecting Work, then clicking Activity Log.



If you know the Item you want, but aren't sure where it is in the **New Item Menu**, click  to search the entire list. The **New Item Menu** will be filtered as you type.



While there is a quick link on the **Activity Log Summary** screen to , it is highly recommended that users create their **Activity Logs** by clicking  and  at the top of the screen. Using the shortcut on the screen will not show all options available when you create an **Activity Log** through the .

Once you have opened a new **Activity Log**, select **Activity Type**: Grievance Note using the drop down.

Activity Log-Mary Poppins

Activity Log for Mary Poppins Status: Pending

DOB:	Phone:	Entered By:	Entered On:
2/18/1954	(617) 555-4477	Jennifer Riedell	4/11/2022 11:50:09 AM

Activity Information

Activity Type: Grievance Note

Notes: [Empty text area]

Attachments

Drag and Drop Files Here to Attach Them

Task, IP Prior Auth, Inpatient Stay, Outpatient

Use the drop down arrow to select **Grievance Note**

Drag and drop any supporting **Attachments** to include them in the Member File. Attachments will be saved on the **Activity Log** and in the **Letters & Attachments** screen.

To insert Standard Text in your Activity Log:

1. Click the selection menu (⋮) at the very top of your CaseTrakker window.

Standard Text is located in the upper selection menu

Not in this menu!

2. Select **Standard Text** from the menu.

jr1362

Activity Log-Mary Poppins

Activity Log for Mary Poppins

DOB:	Phone:	Entered By:	Entered On:
2/18/1954	(617) 555-4477	Jennifer Riedell	4/6/2022 3:40:27 PM

Standard Text

3. In the **Standard Text Menu**, scroll to the bottom to access **SCO CM** templates.

4. Scroll back up the **Standard Text Menu** to find the **Grievance Note Template**. When you click Clinical Note, the text of this template will be copied to your computer and the popup will close.
5. Back in the **Activity Log**, click in the **Notes** field and paste (CTRL+V) the template. (see below)
6. Complete the **Grievance Note Template** using the guidelines below.

Standard Text Menu

Select a Standard Text below to copy a shortcut for it to your clipboard. It can then be pasted in any large text field.


Clinical Services - Member Calls	>	ACREAD
Clinical Services - Provider Calls	>	ADH OPE
CM - Acute Care RFI/CMA	>	AFC OPE
CM - Acute Care/CM Discharge	>	Basic OPE
CM - Acute Care/CM Initial	>	Clinical Note
CM - Continued Stay	>	FI OPE
CM - Denial: Lack of Information/CMA	>	GAFC OPE
CM - End of Month Still In/CM	>	Grievance Note
CM - Extended Care RFI/CMA	>	NP Acute/Community
CM - Hospice/CMA & possibly CM	>	NP Hospital Discharge/ Community
CM - Initial	>	NP Monthly/Community
Medical Affairs	>	NP Transitional Visit
Mental Health	>	PCM OPE
Mental Health - Approvals	>	PERS OPE
Mental Health - Benefit	>	Post Hospital Note
Mental Health - Denials	>	Transportation OPE
Mental Health - Outpatient	>	Treatment Plan Note
Mental Health - RFMI	>	
SCO CM	>	

Activity Type

Grievance Note


Notes

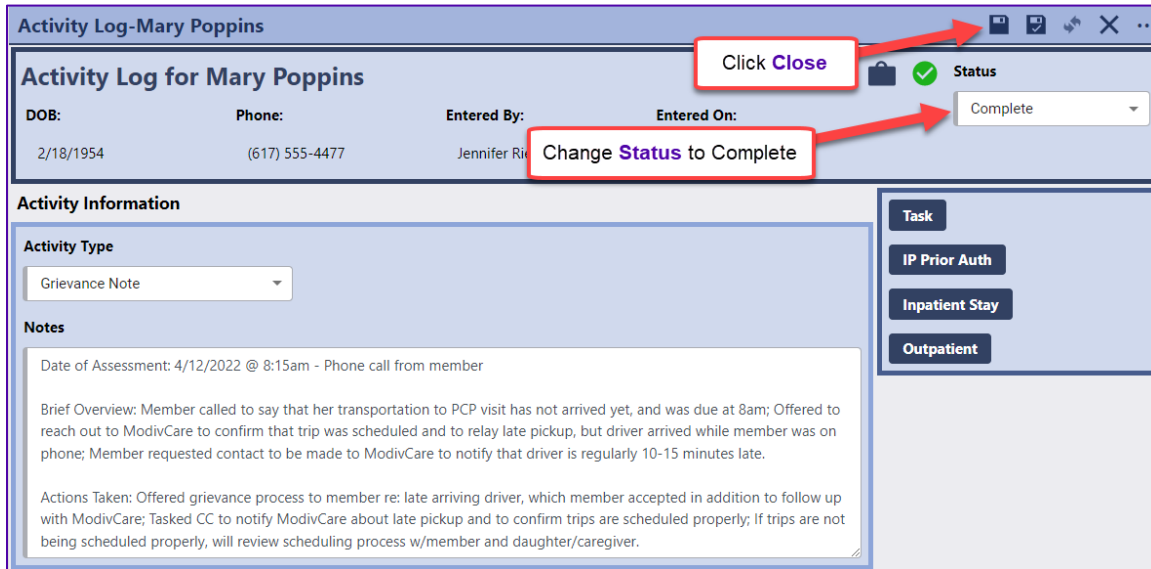
Date of Assessment:
Brief Overview:
Actions Taken:

- **Date of Assessment:** Provide date/time of complaint, even if it did not occur during a regular assessment visit; Note if the complaint was received by phone, during home visit, etc.
 - **Brief Overview:** Briefly document who is making the complaint, when the event occurred, what they want to happen, and why they want that resolution. Just the facts!
 - **Actions Taken:** Describe the solution(s) that have been tried/offered by Care Management and the result(s). Also include follow up, such as *Grievance emailed to A&G Coordinators Team; Assisted member in contacting CR for associated OD Request*; etc.
7. Click and drag any supporting attachments to the **Attachments** area, if necessary.
-  Remember that any **Attachments** will be saved on the **Activity Log** and in the member's **Letters & Attachments** screen.
8. Copy the text in the **Notes** section, then paste it into an email to AG_Coordinator_Team@point32health.org. If additional information is available to assist the

Appeals & Grievances Team that should not be included in the member file, those details can be added in this email.

If this Grievance needs to be escalated ... [enter process information – Check Transportation process for information]

9. Once your **Grievance Note** is complete, change the **Status** to Complete and click .



10. Once the Activity Log has finished saving, click  and .

11. Once you click **Sign Record**, the text in the Activity Log will be locked, so no more changes could be made. If you need to add additional information, begin typing in the Notes field. A Save Amended Text button will appear as you type. Click the button when you are finished, and the amended text will be date and time stamped above the original note text.

