aDVAnce Version 6 Upgrade – VAN & OBAS CCF Guide
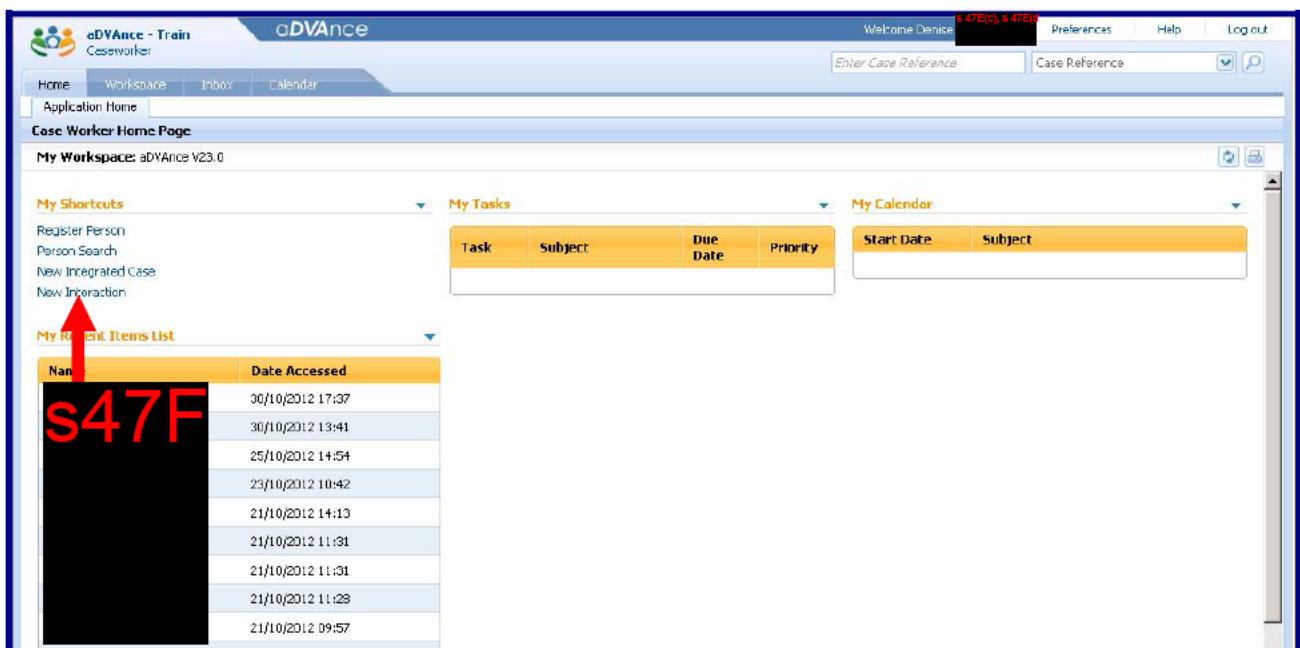
This guide is designed to assist VAN & OBAS staff understand the changes to CCF and Tasks under the Cúram Version 6 upgrade.
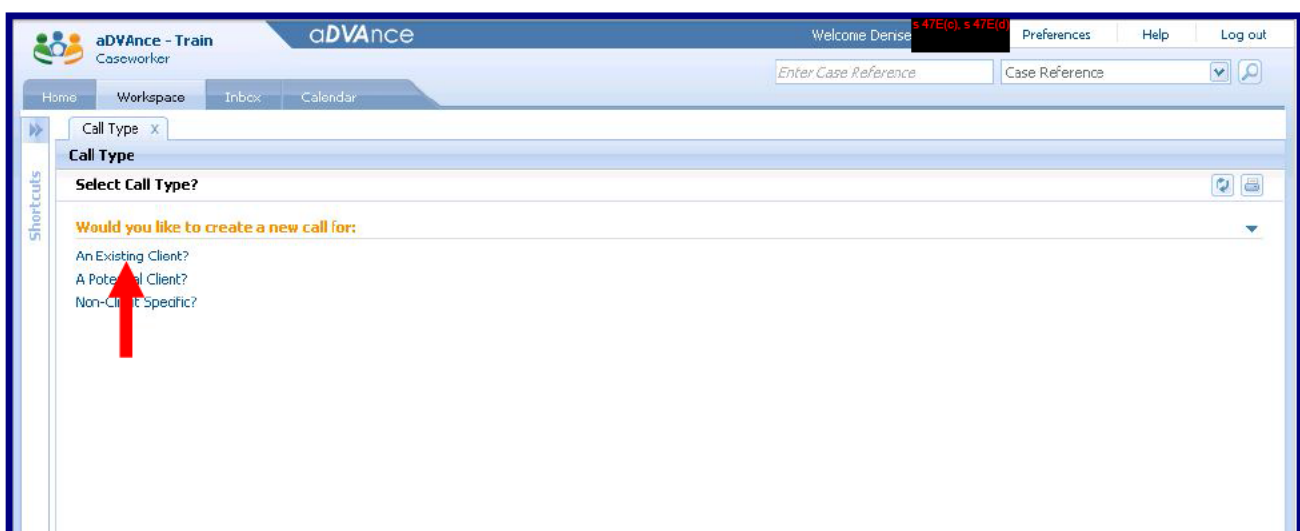
Daily Housekeeping:

It is recommended that each morning when VAN and OBAS staff first access aDVAnce they spend one minute to set up their Workspace to their advantage.

Note: Any Reserved Tasks will display in your **My Tasks** panel.

Step 1 – On your Application Home screen click **New Interaction**.
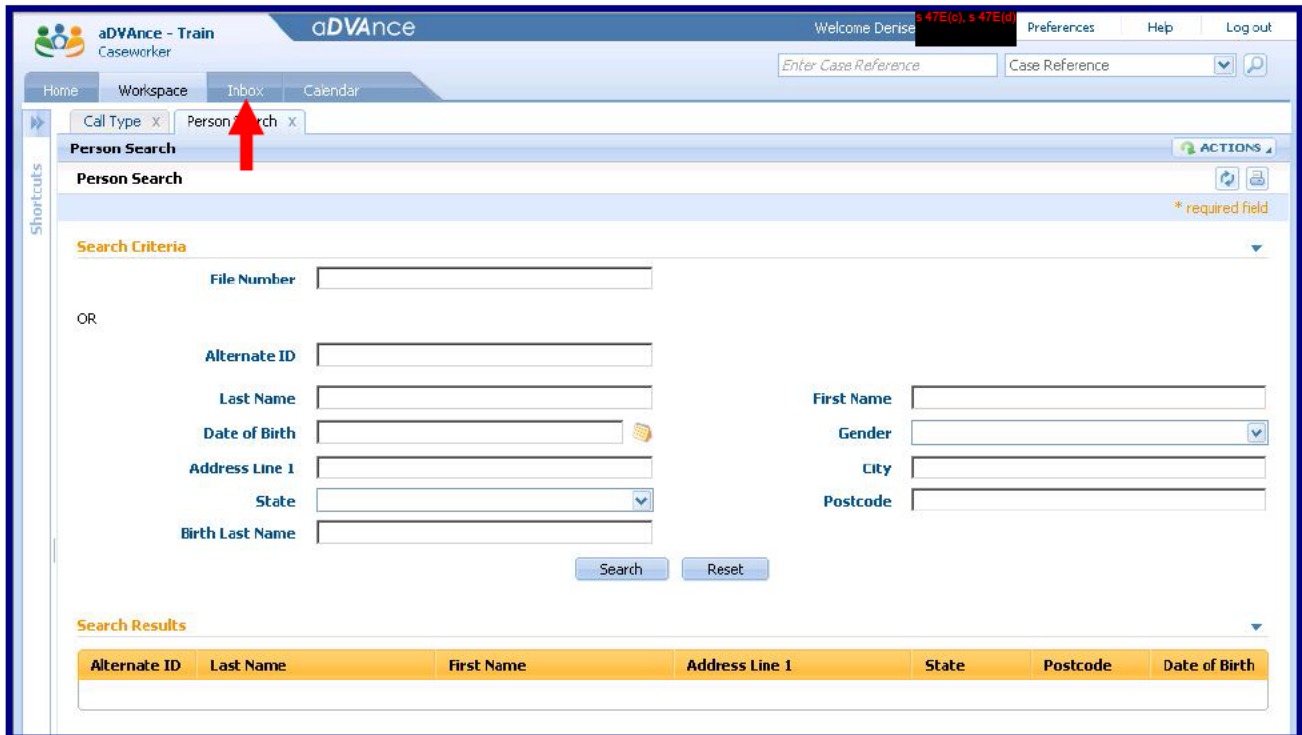
The Call Type tab opens within your Workspace.

Click the **An Existing Client?** option.
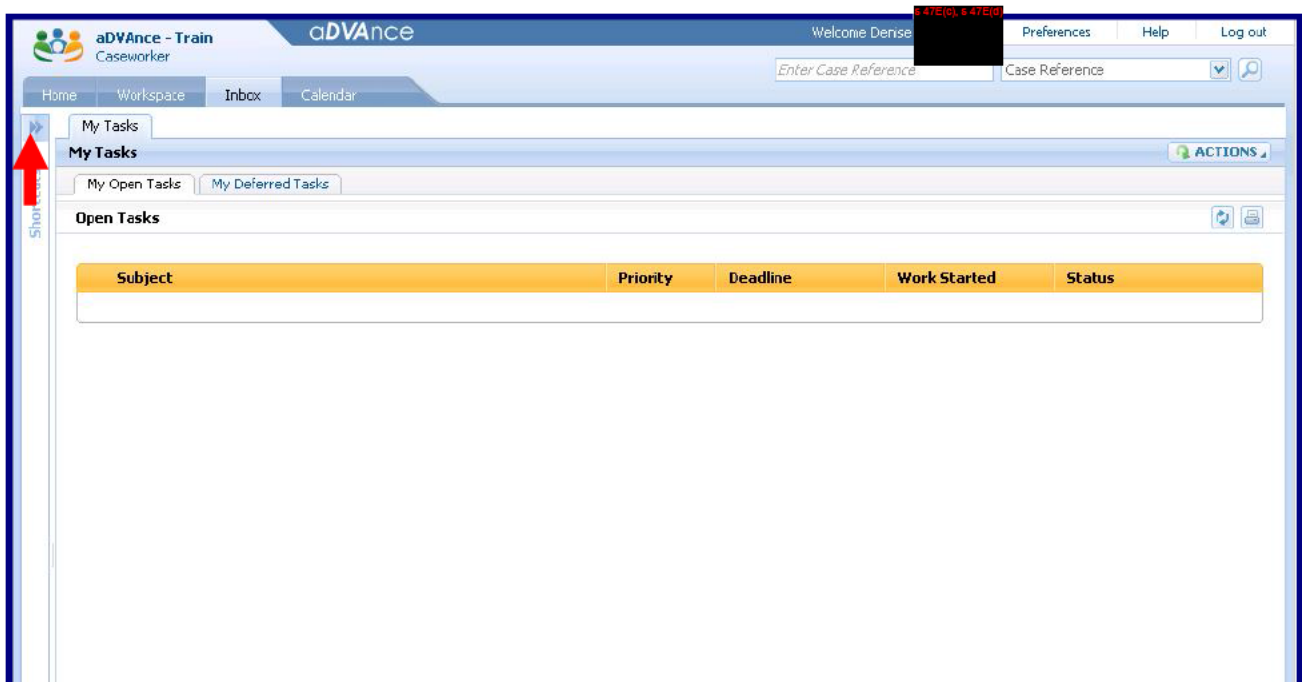
The Person Search tab opens within your Workspace.

Your Workspace is set for the day – with the Call Type and Person Search tabs open. These tabs should remain open and never closed.

To work with Tasks and Work Queues access your Inbox tab.

Any Reserved Tasks will display in your **My Tasks** panel.

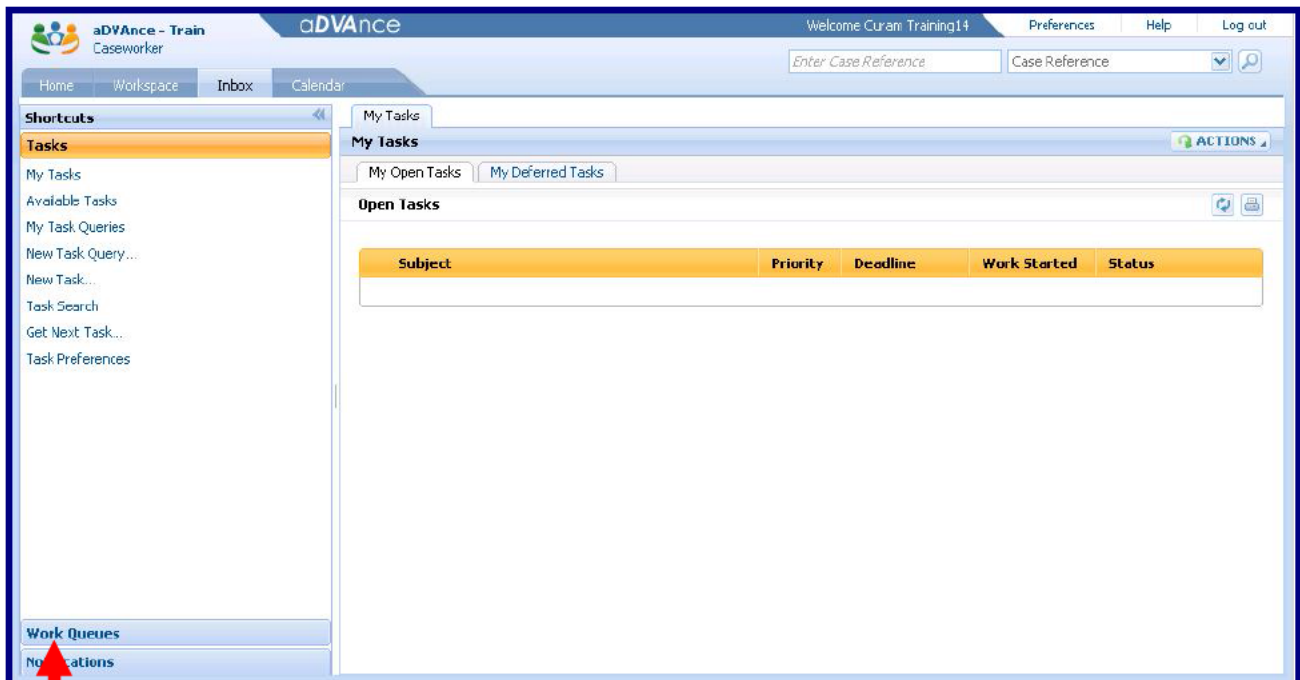To access Work Queues click the Shortcuts arrows icon.

The Shortcuts panel opens and the Tasks menu is displayed.

Click **Work Queues** at the bottom of the Shortcuts panel.

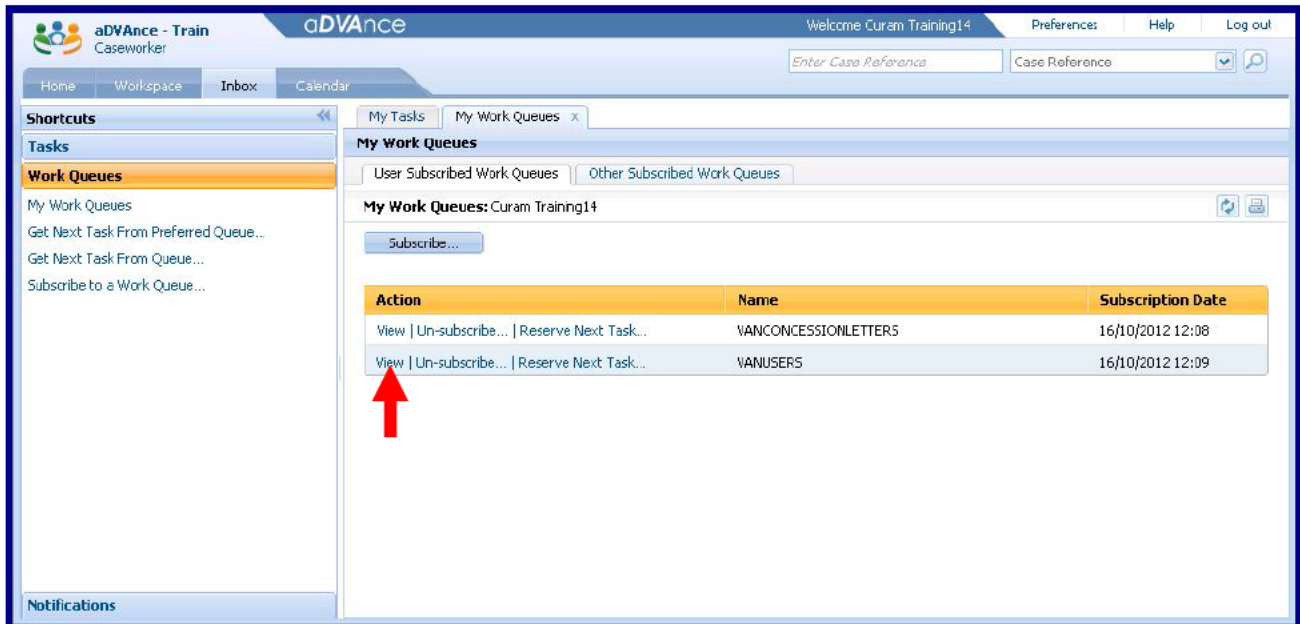The Tasks menu closes and the Work Queues menu is displayed.
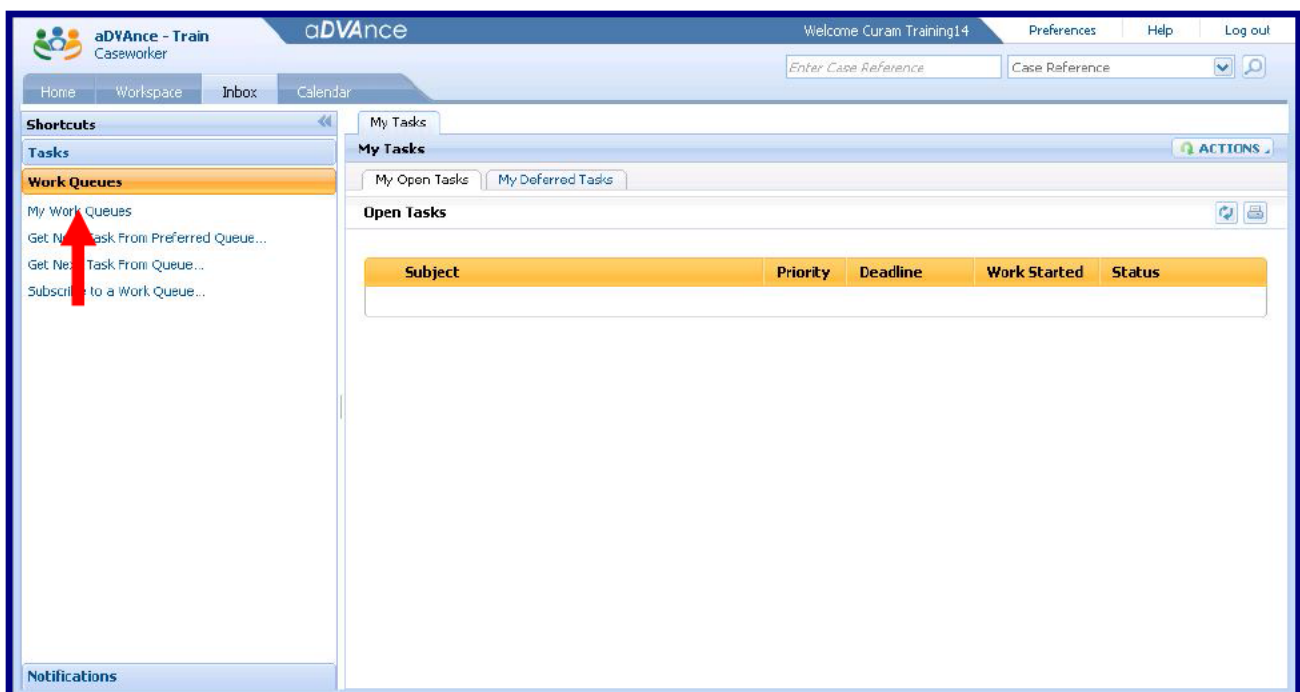
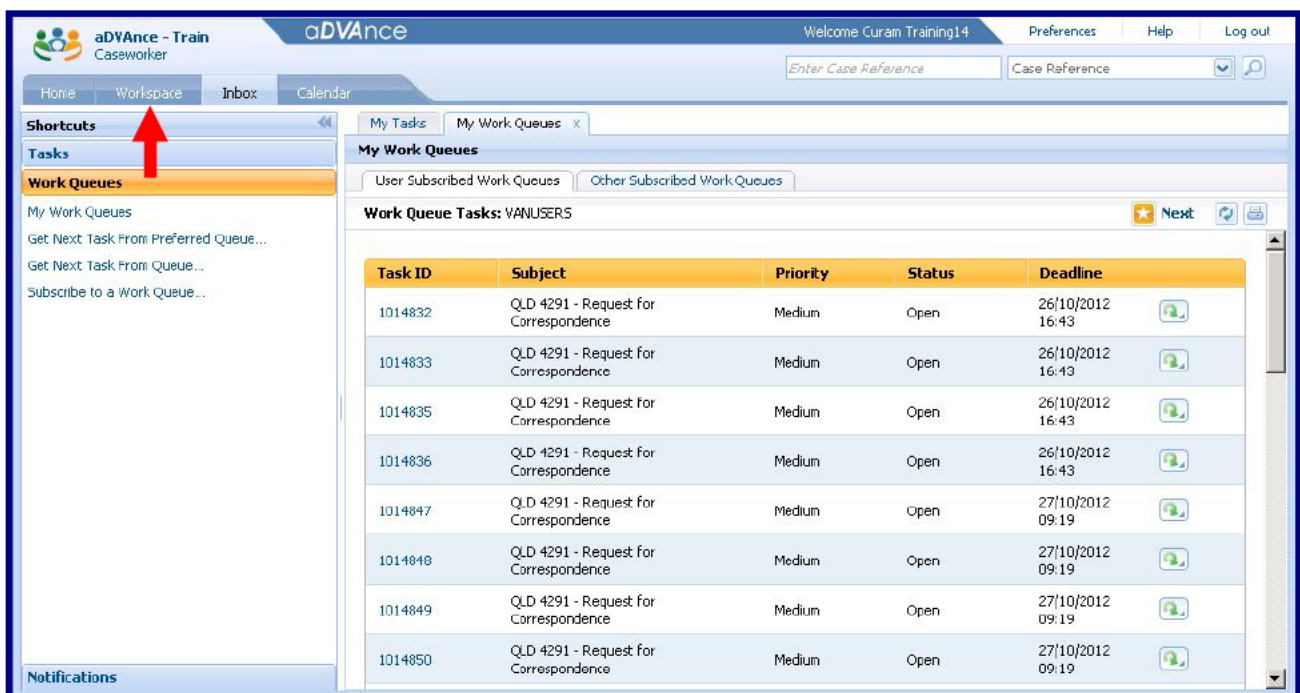Click **My Work Queues** in the Work Queues menu.

The My Work Queues tab opens and your subscribed Work Queues display.

View the VANUSERS Work Queue.

Access your Workspace – aDVAnce has been organised to streamline your work activities.
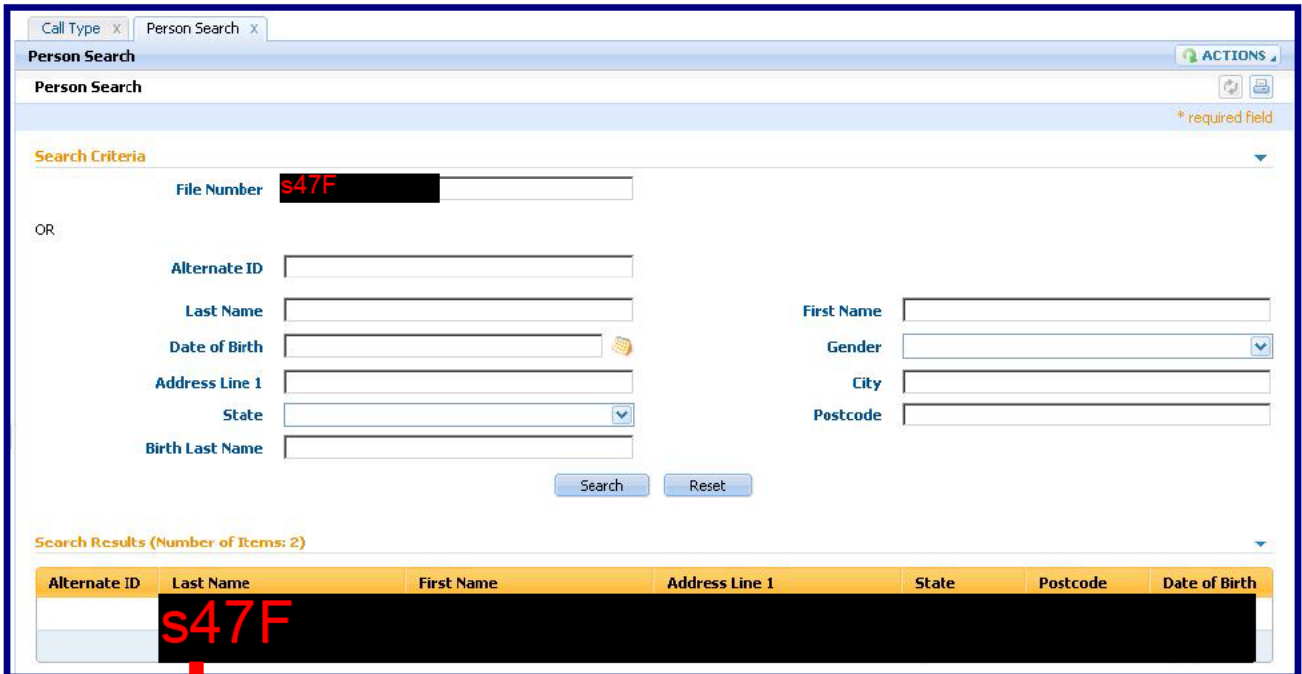
If you need to access the VANCONCESSIONLETTERS Work Queue click **My Work Queues** in the Work Queues menu.

The My Work Queues tab displays your subscribed Work Queues - **View** the VANCONCESSIONLETTERS Work Queue.

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Recording a Client Specific Interaction

To record a Client Specific interaction conduct a Person Search.
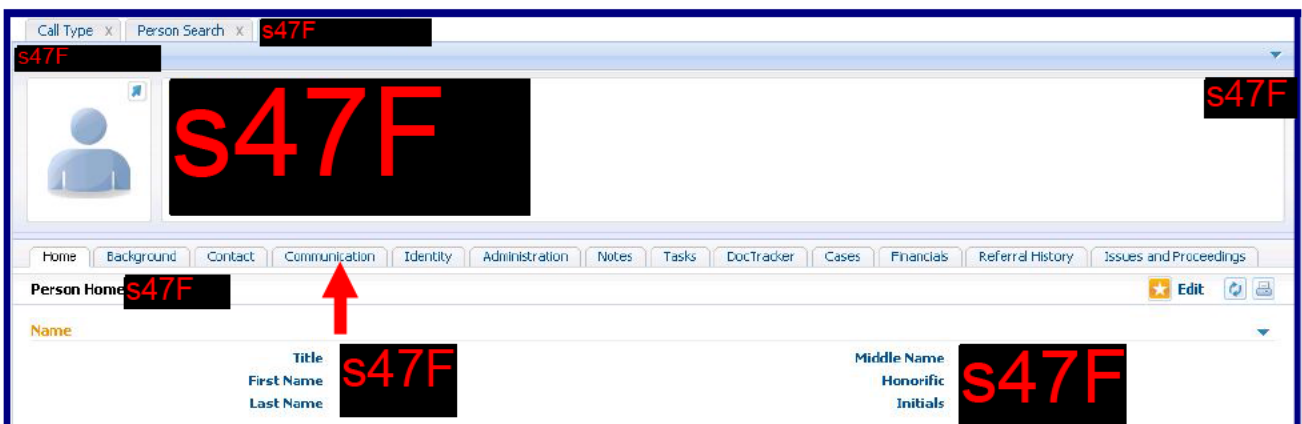
In the Person Search tab enter the file number and click [Search].

Following a successful search click the required client's Last Name.

Recommendation: Following a successful search highlight the DVA File Number, right click with the mouse and copy it for future use within the communication.
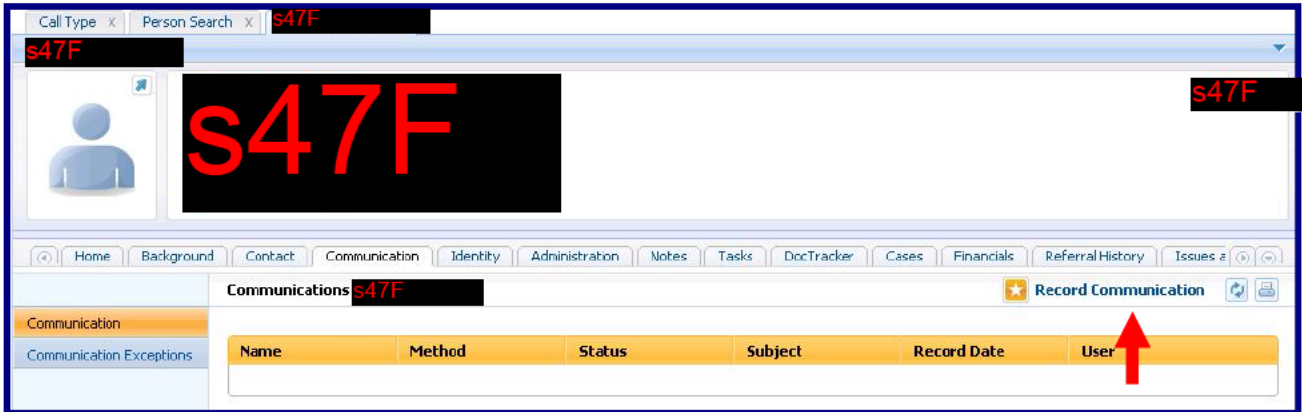
The client's Home screen opens in a new tab.

Access the client's Communication tab.

Communication tab:
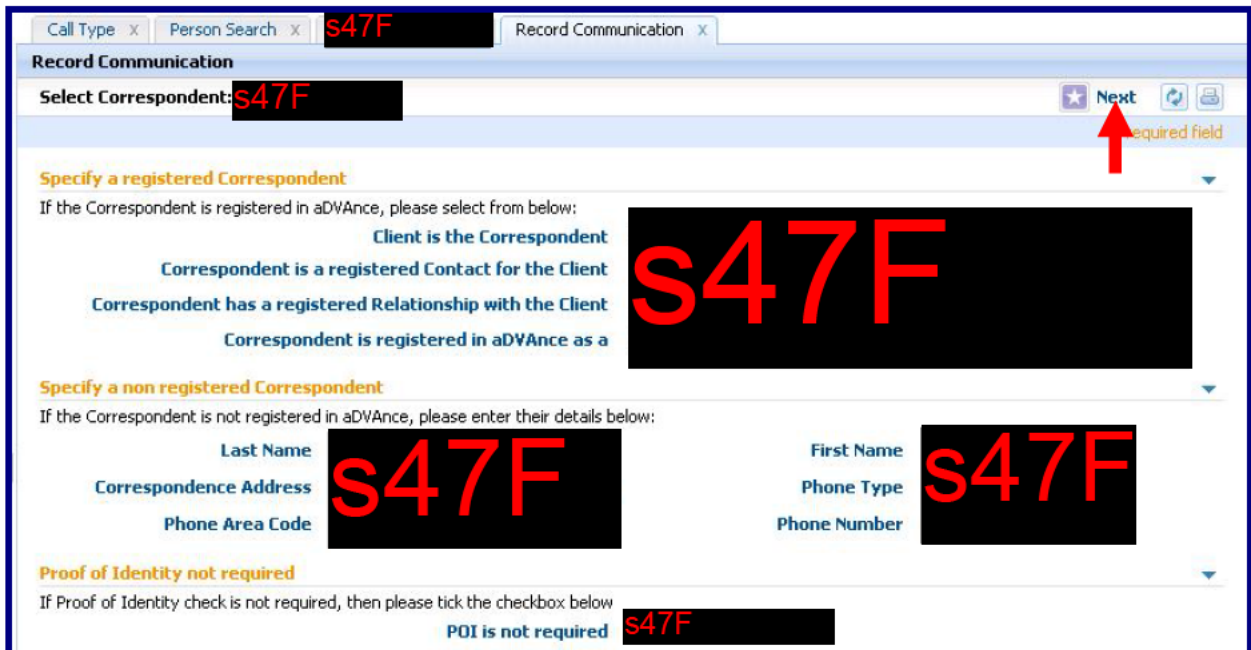
When the Communication tab is accessed the Communications screen automatically opens.

To create a communication click the **Record Communication** action icon.

Select Correspondent screen:

The Record Communication screen opens in a new tab.

Select the Correspondent and click **Next**.

Note: The Select Correspondent screen is unchanged apart from the use of the **Next** action icon.

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Verify Correspondent screen:

Perform the standard Proof of Identity Check - click **Next**.

Client Contact Topics screen:

Select the required Method and Direction and then click **Search** to access the list of CCF script topics.

Launch the required CCF script.

The CCF script opens in a new tab labelled IEG Player.

Complete the script questions and click Next .

It is recommended to use Next , Notes and Summary to navigate through the CCF scripts.

The use of Exit or Previous may cause a second IEG tab to open.

Continue answering the script questions and click **Next**.

Continue answering the script questions.

Access the **Notes** tab and paste the File Number. Click **Next**.

Recording the DVA File Number:

Recommendation - Record the File Number in the Notes tab.

Recording the File Number in the Notes tab means the File Number is incorporated within the Communication Text and is more visible when reading the communication.

Recording the File Number in the Comments panel produces a visual disconnect between the Communication Text and the Comments.

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CCF Summary screen:

The final page of every CCF script is the CCF Summary Page.

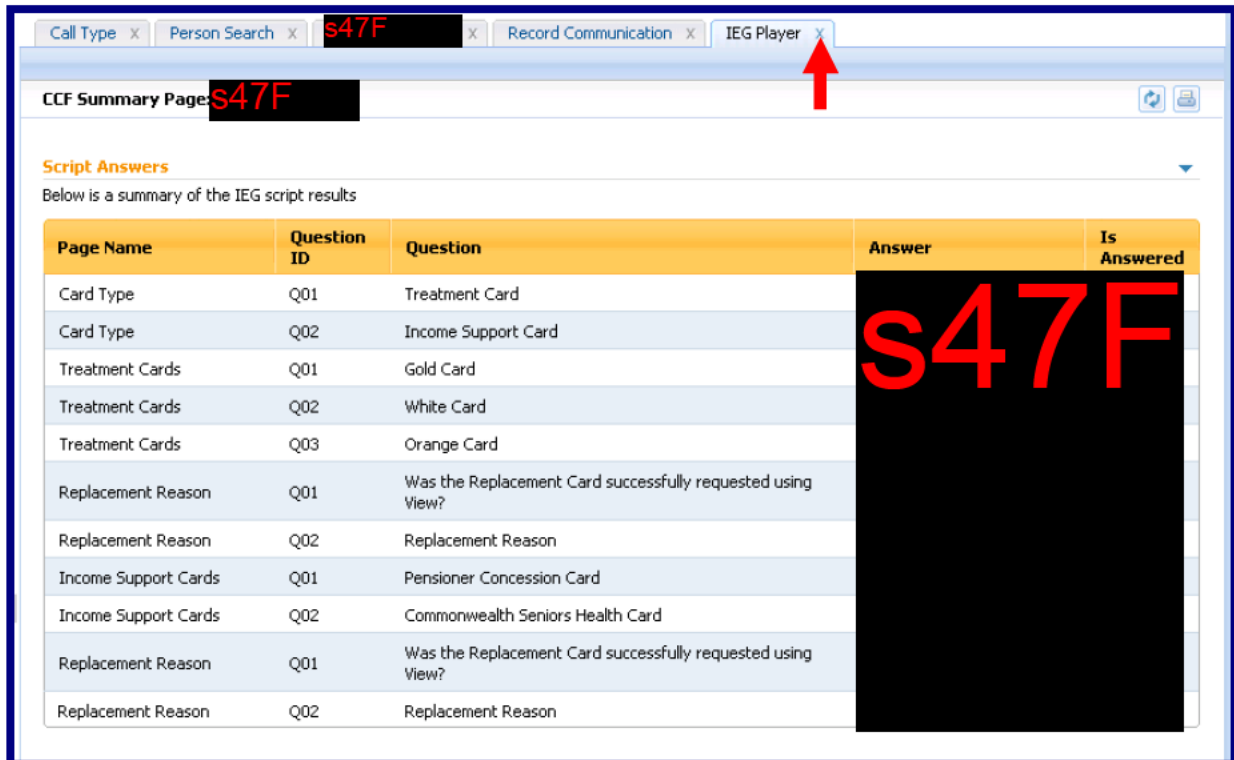| Page Name	Question ID	Question	Answer	Is Answered
Card Type	Q01	Treatment Card		
Card Type	Q02	Income Support Card		
Treatment Cards	Q01	Gold Card		
Treatment Cards	Q02	White Card		
Treatment Cards	Q03	Orange Card		
Replacement Reason	Q01	Was the Replacement Card successfully requested using View?		
Replacement Reason	Q02	Replacement Reason		
Income Support Cards	Q01	Pensioner Concession Card		
Income Support Cards	Q02	Commonwealth Seniors Health Card		
Replacement Reason	Q01	Was the Replacement Card successfully requested using View?		
Replacement Reason	Q02	Replacement Reason		

Close **IEG Player X** the IEG Player tab by clicking the **X**.

Note: This action is also required where a CCF script is accessed in error. Do not click **Exit** – close the IEG Player tab instead.

You are returned to the Record Communication tab.
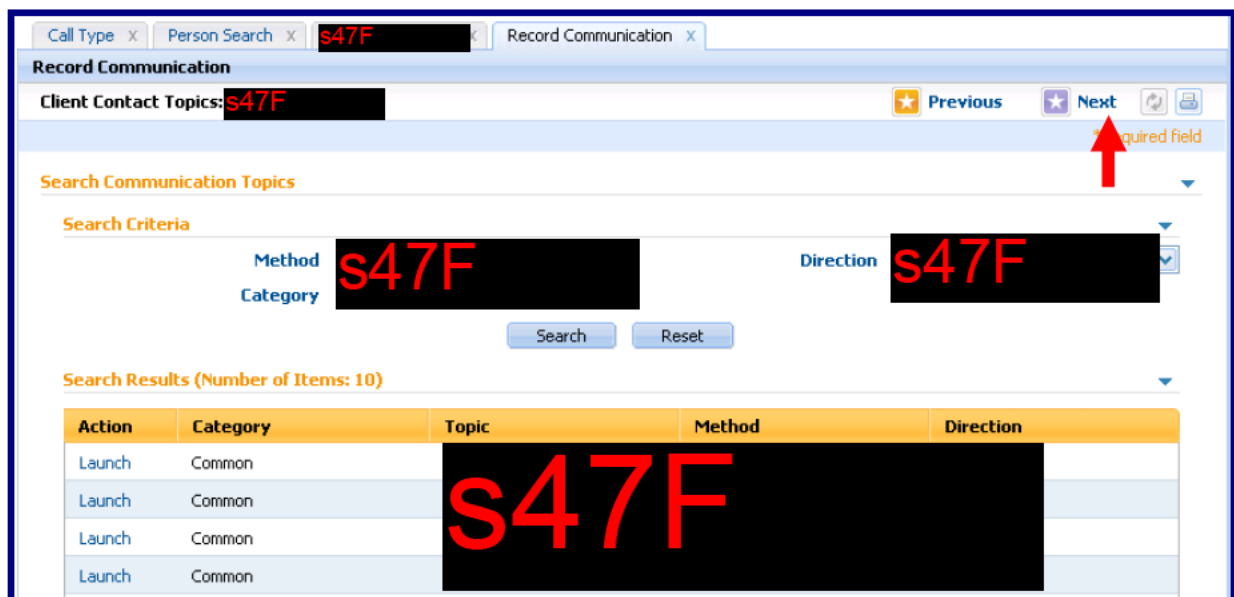
Launch and complete any further scripts. Once finished click **Next**.

Create Communication Record screen:

The communication is complete - click **Save**.

You are returned to the Record Communication tab.

The Communication is displayed - click ⊠ to close the Record Communication tab.

You are returned to the client's Communications screen.
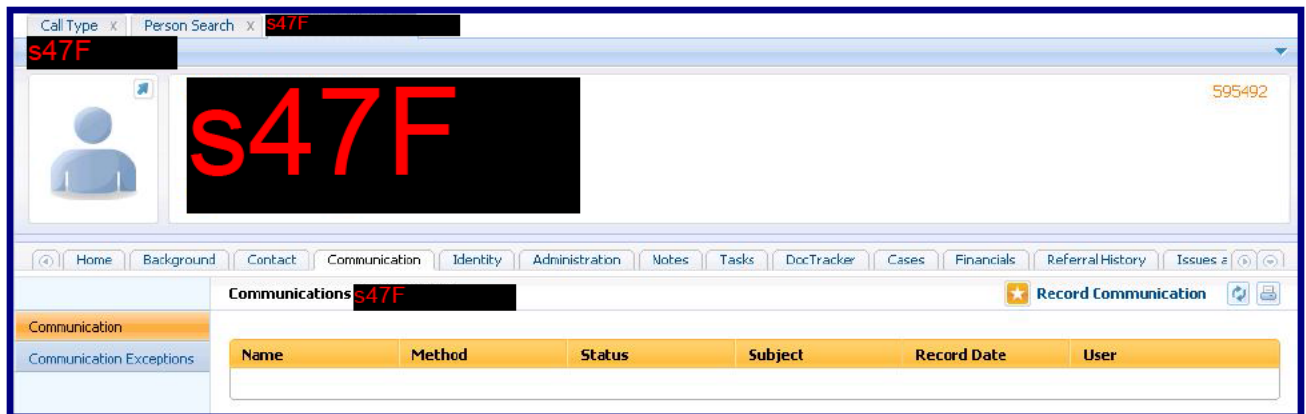
The communication has been saved but is not visible on the client's Communications screen – the client's tab was inactive.

The VAN officer has 2 options:

Option 1 – Trust yourself

The communication was displayed on the Record Communication tab – trust your actions and click ☒ to close the client's tab.

You are returned to the Person Search tab.

Option 2 – Seek confirmation

If you want visual confirmation click 🔄 alongside the Record Communication icon to refresh the Communications screen.

The communication is displayed.
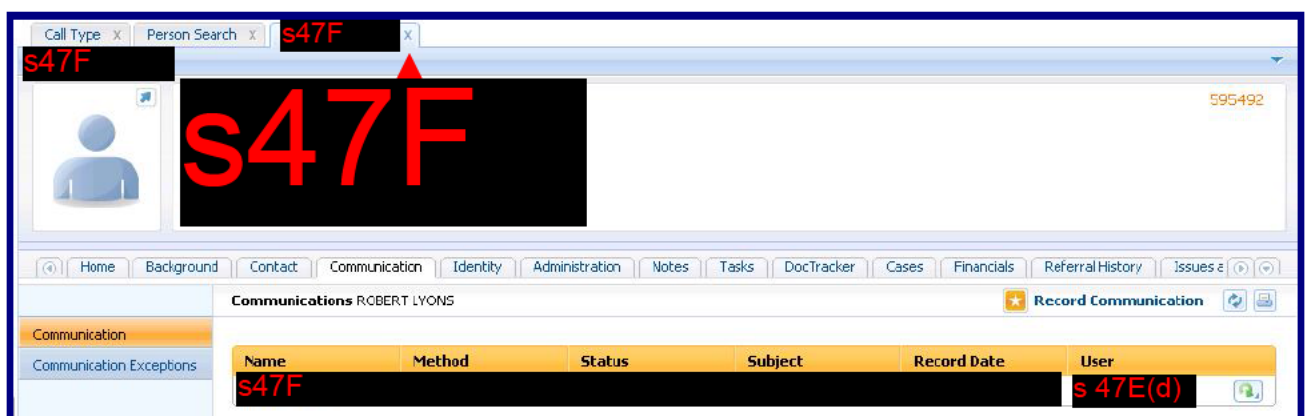
Close the client's tab – click ☒.

You are returned to the Person Search tab.

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Person Search tab:

Click [Reset] to clear the Person Search tab.

You are returned to your Workspace with the Call Type & Person Search tabs open ready to record the next interaction.

Recording the next interaction:

If the next call or counter interview is Client Specific:

- Record the DVA File Number, conduct a Person Search and access the client's Home Screen;

- Access their Communication tab and record the interaction as per standard work practice.

If the next call or counter interview is Non Client Specific or relating to a Prospect or a Potential Client:

- Access the Call Type tab and select either A Potential Client or Non-Client Specific;

- Record the interaction as per standard work practice.

Recording a Change of Address notification

Recording a Change of Address involves the following 3 basic steps:

Step 1 –   Access the client's record, create a new communication and access the CCF Change of Address script;

Step 2 -   During the execution of the CCF Change of Address script access the client's Addresses screen and perform the address change using IQ Rapid;

Step 3 -   Return to the CCF Change of Address script and complete the communication.

During these steps the VAN Officer will move between tabs – you must be careful to access tabs correctly and not to accidently close the tab.

The CCF communication is the client's (or their representative's) authority for their address to be changed.

Note: Where the address change is for both the Veteran and Spouse (or defacto) care must be taken to ensure that the correspondent has the authority to change the address for both members of the couple.

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Example - Change of Address for a single veteran:

This example only highlights the key steps involved.

Step 1 – Access the veteran's Communications screen and create a communication – launch the Change of Address script.

Answer YES to Veteran and click **Next**.

Click the **"Link to Client Address page"** hyperlink.

Step 2 -   Access the client's Addresses screen and perform the address change using IQ Rapid;

You are taken to the Addresses screen in the client's tab.
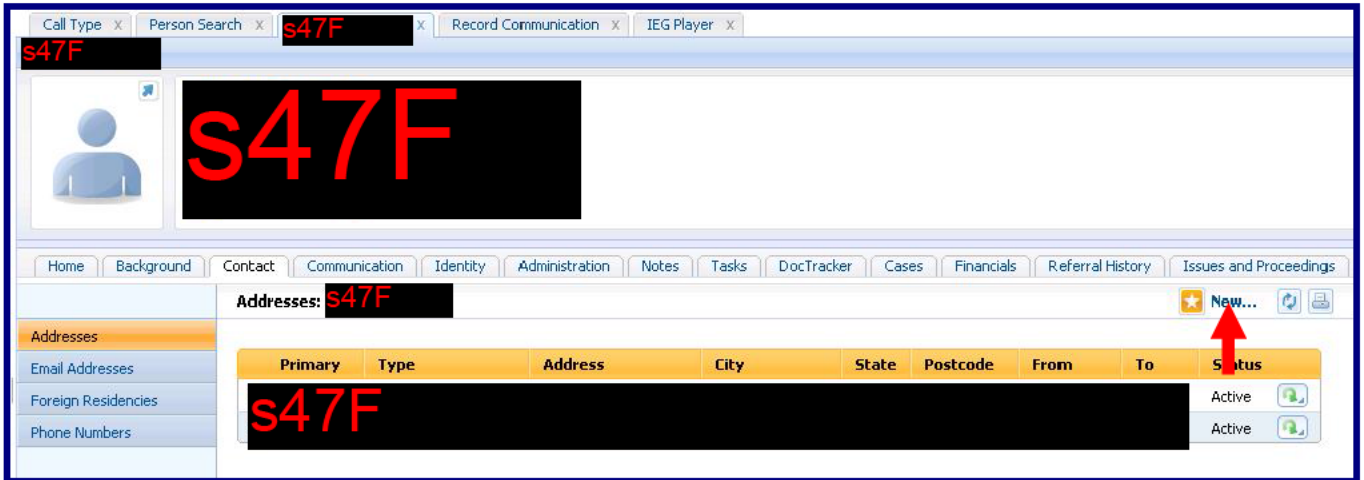
Click [★ New...] and perform the Change of Address using IQ Rapid as per current procedures.

The address has been successfully changed.
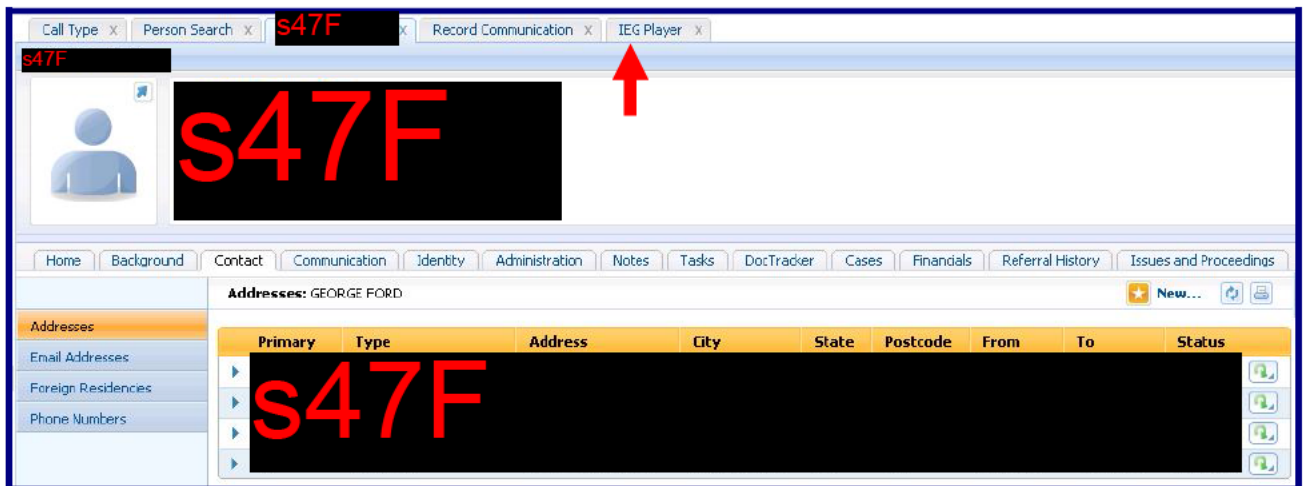
Click the IEG Player tab to return to the Change of Address script.

Note: Be careful when accessing tabs.

To access a tab click the Title of the tab – Example: [IEG Player X]

Avoid clicking near the [X] as this could close the IEG Player tab.

Step 3 - Return to the CCF Change of Address script and complete the communication.

You are returned to the Change of Address script.

Continue recording and save the communication as detailed earlier.

Close all completed tabs to return to the Person Search tab.

Click [Reset] to clear the Person Search Tab.

Recording a notification of Overseas Travel:

Recording a notification of Overseas Travel is similar to the Change of Address notification and involves the following 3 basic steps:

Step 1 – Access the client's record, create a new communication and access the CCF Change of Cirumstances – Personal Details related – Overseas Travel script;

Step 2 - During the execution of the CCF Overseas Travel script access the client's Foreign Residencies and Travel screen and record the Overseas Travel details;

Step 3 - Return to the CCF Overseas Travel script and complete the communication.

During these steps you may need to also access the partner's Foreign Residencies and Travel screen to record their travel as well.

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Processing a task from the VANUSERS Work Queue:

To process tasks from the VANUSERS Work Queue access your Inbox.

To reserve a task from the Work Queue click ⬛ the task's action icon.

The task's Action icon displays [Reserve...] click Reserve.

Click **Save & View** to reserve the task and process it.

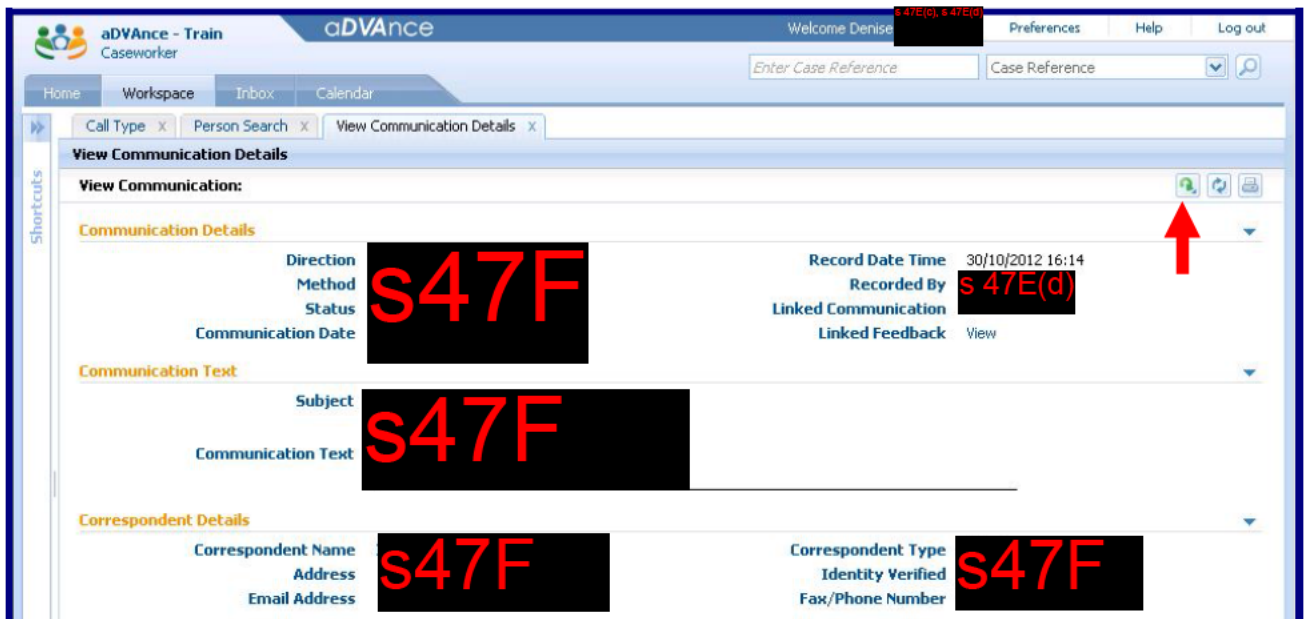Note: Click **Save** if you want to reserve the task and return to the Work Queue.

The Reserved Task opens in a new tab in your Inbox.
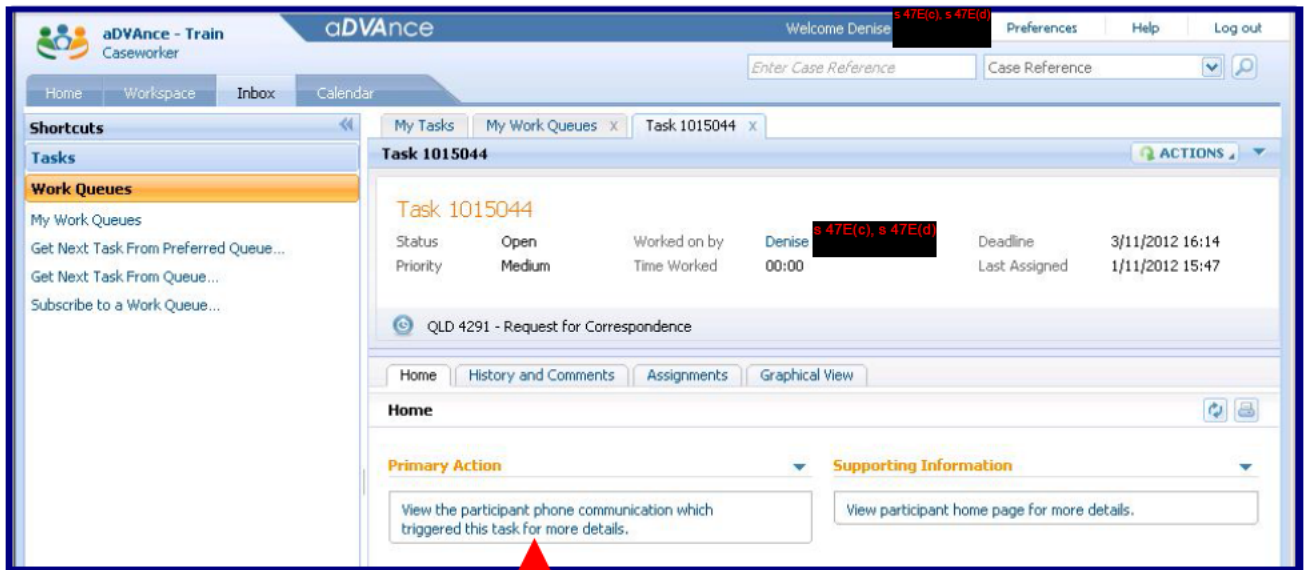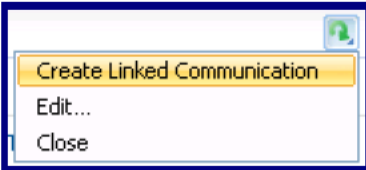
Select the Primary Action – "View the participant phone communication which triggered this task for more details" link.

The View Communication Details tab opens in your Workspace.

From the Communication Text panel highlight and copy "Income Support Lump Sum Advance" for future use in the outgoing linked communication.
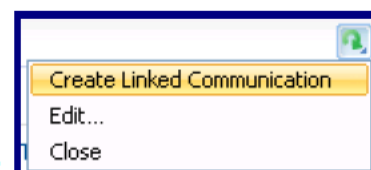
Click [icon] the actions icon, which displays [menu] - click **Create Linked Communication**.

The Record Communication screen opens in a new tab.

Select the Correspondent and as this is an outgoing communication activate the POI is not required checkbox.

Click ⭐ Next .

Change the Method to Letter and Direction to Outgoing. Activate the Other Correspondence check box & paste the comments copied earlier.

Click ⭐ Next .

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Create Communication Record screen:

The draft outgoing communication displays with a link to the original communication.

Check for completeness and then click [⭐ Save].

The Record Communication tab displays both the original communication and the linked outgoing communication.

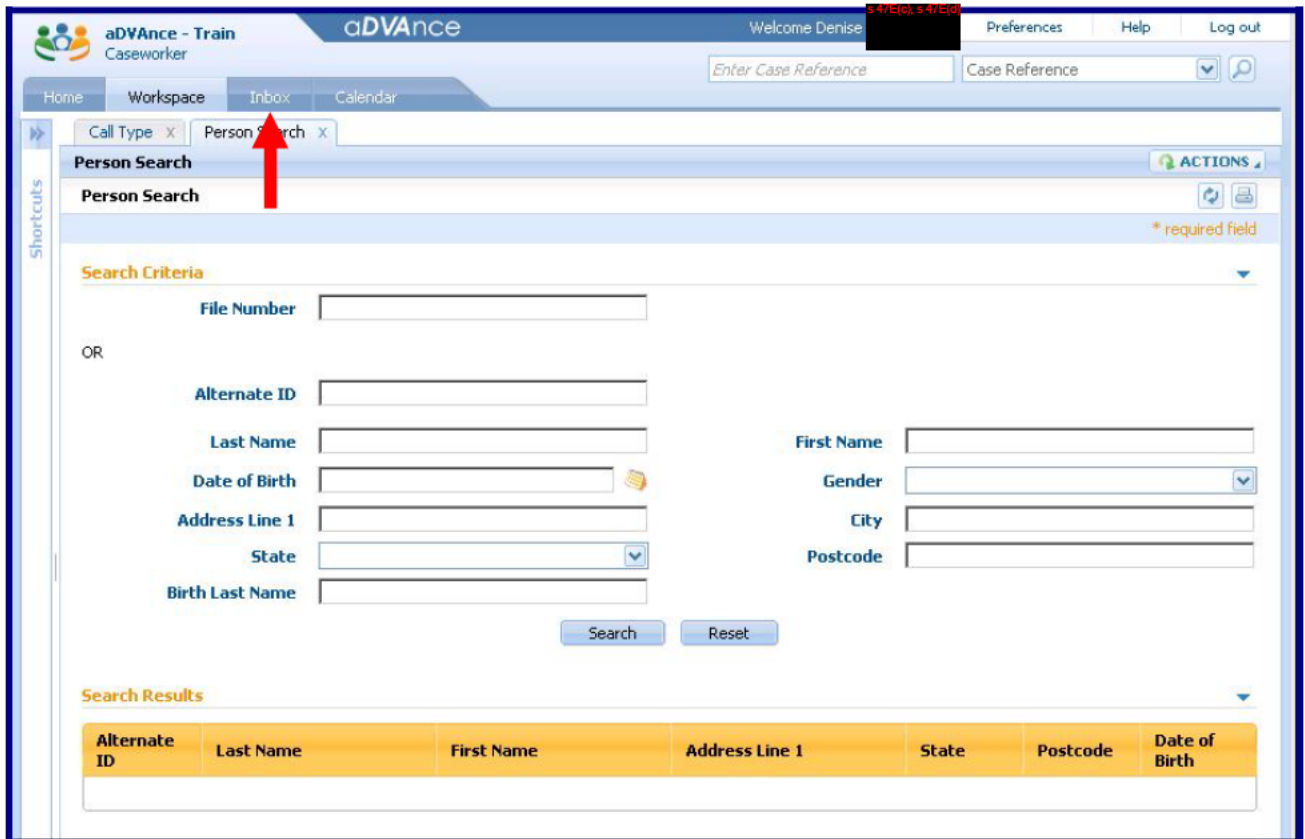Click [x] to close the Record Communication tab.
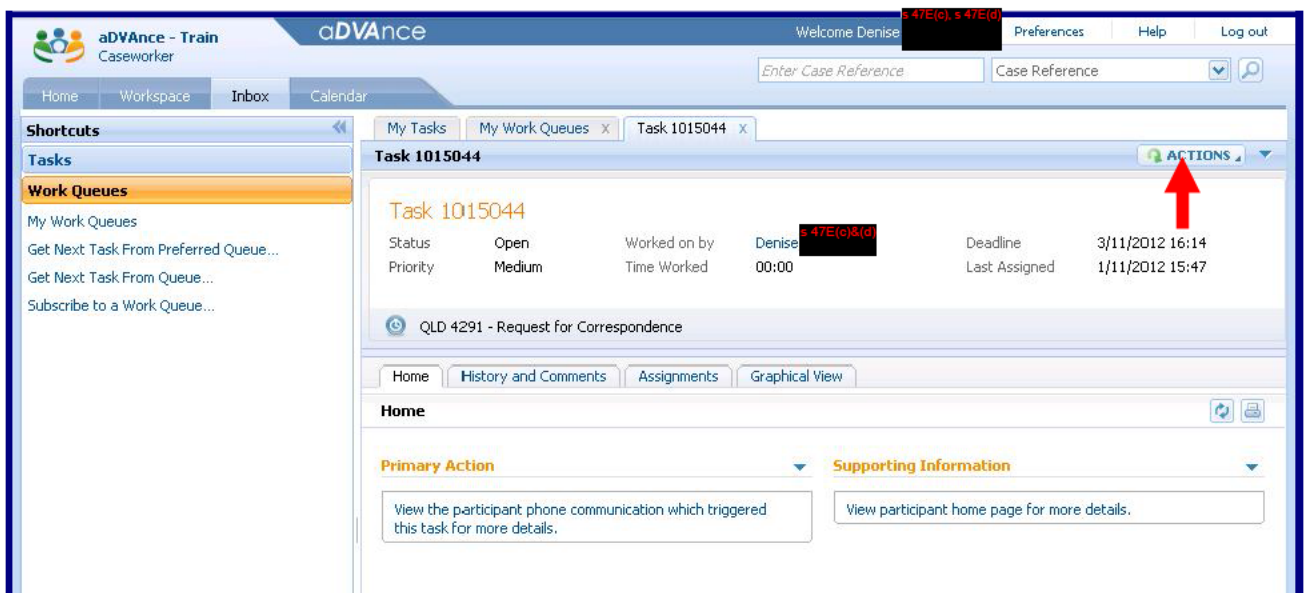
Click [x] to close the View Communication Details tab.

The final step is to close the Task – return to your Inbox tab.

Click [ACTIONS] the Task actions icon.
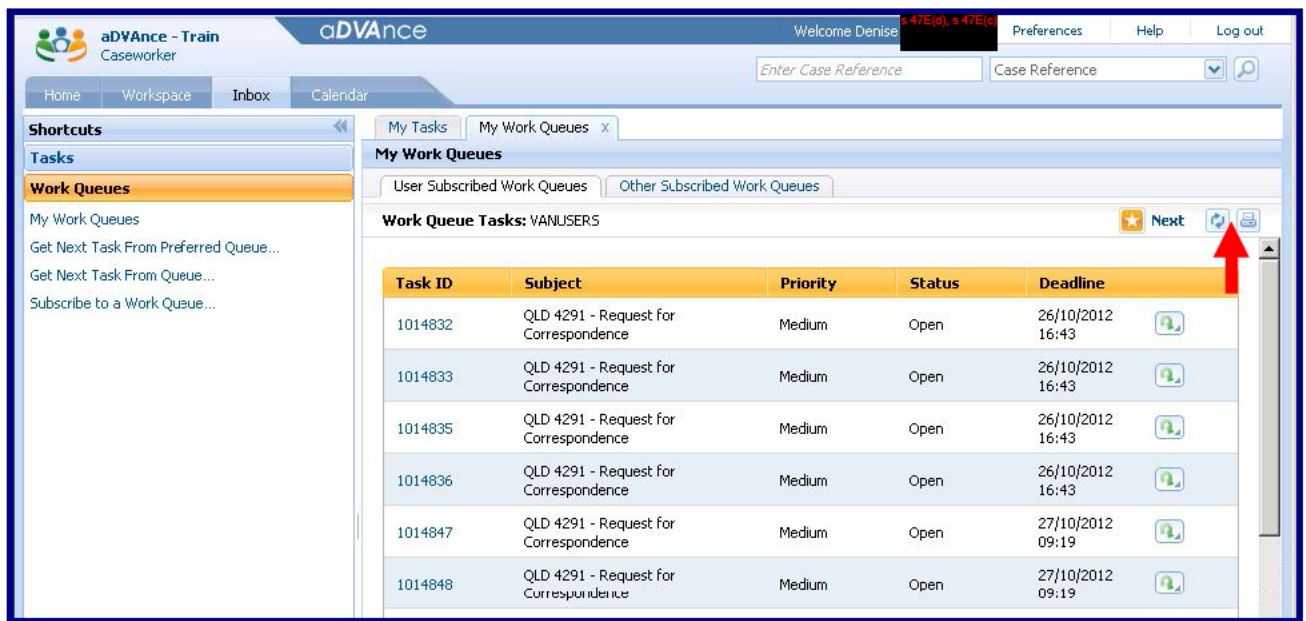
The Task actions menu displays - click Close to close the task.
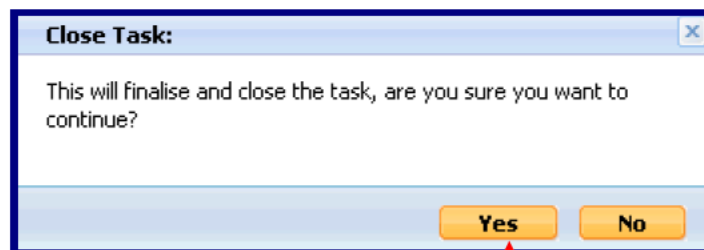
Click **Yes** to confirm the task closure.
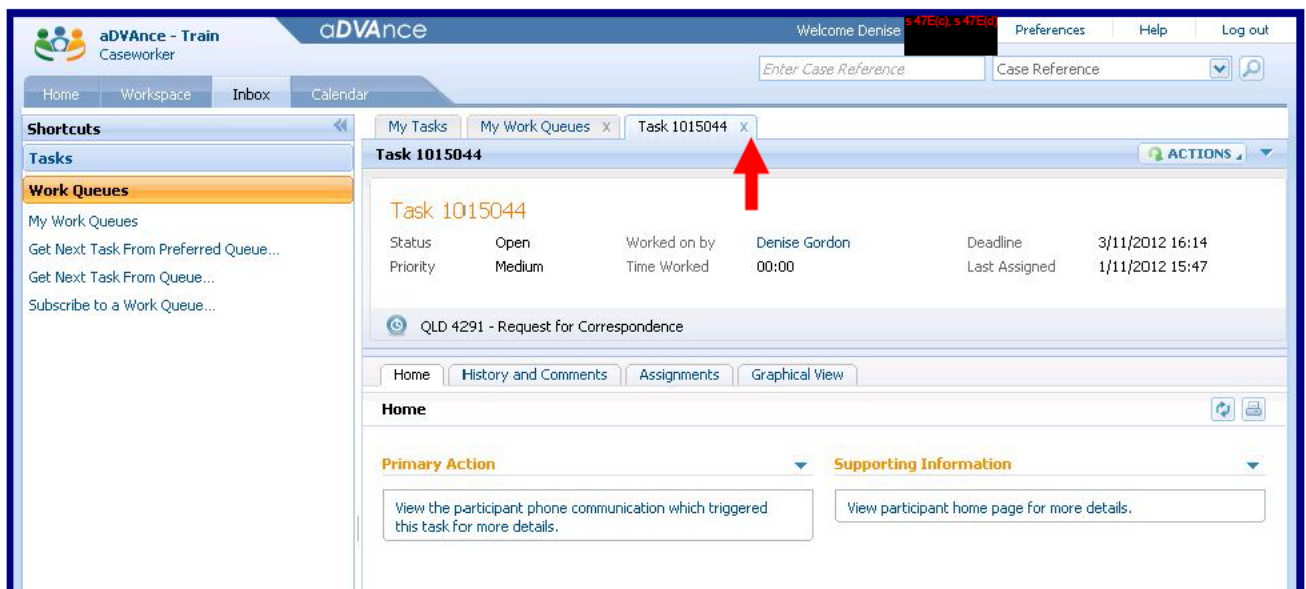
The task has been closed but still displays Open status. Click ☒ to to close the Task tab.

You are returned to your My Work Queues screen.

To continue processing Work Queue tasks click [icon] to refresh the Work Queue.

If there are multiple pages of tasks within the Work queue click [Next button] to progress to the next page of tasks.

Processing a task from a client's Tasks screen:

In certain circumstances VAN Officers process tasks directly from the client's Tasks screen. This situation most commonly occurs where the client requests a Statement of Pension be faxed to a concession authorities provider.
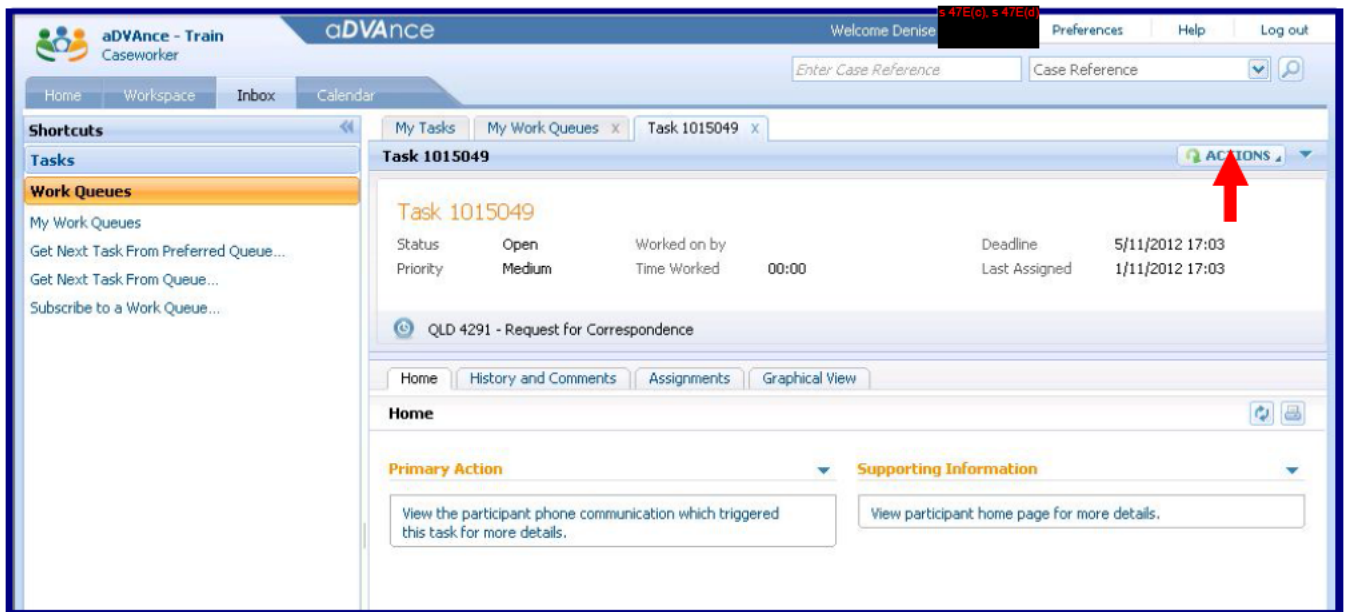

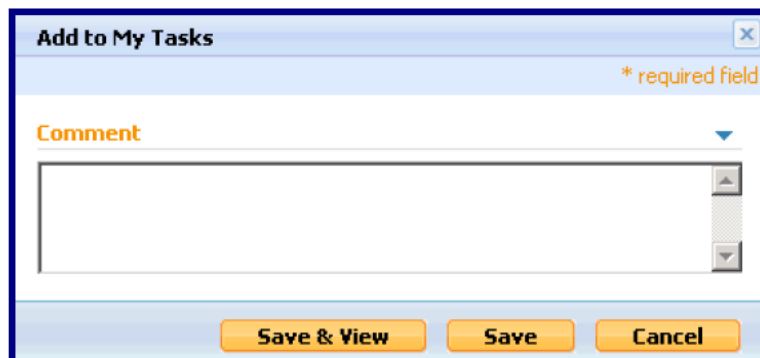From the client's Tasks screen click the Task ID Number link.

The task opens in a new tab in your Inbox.

Click **ACTIONS** the Task actions icon.
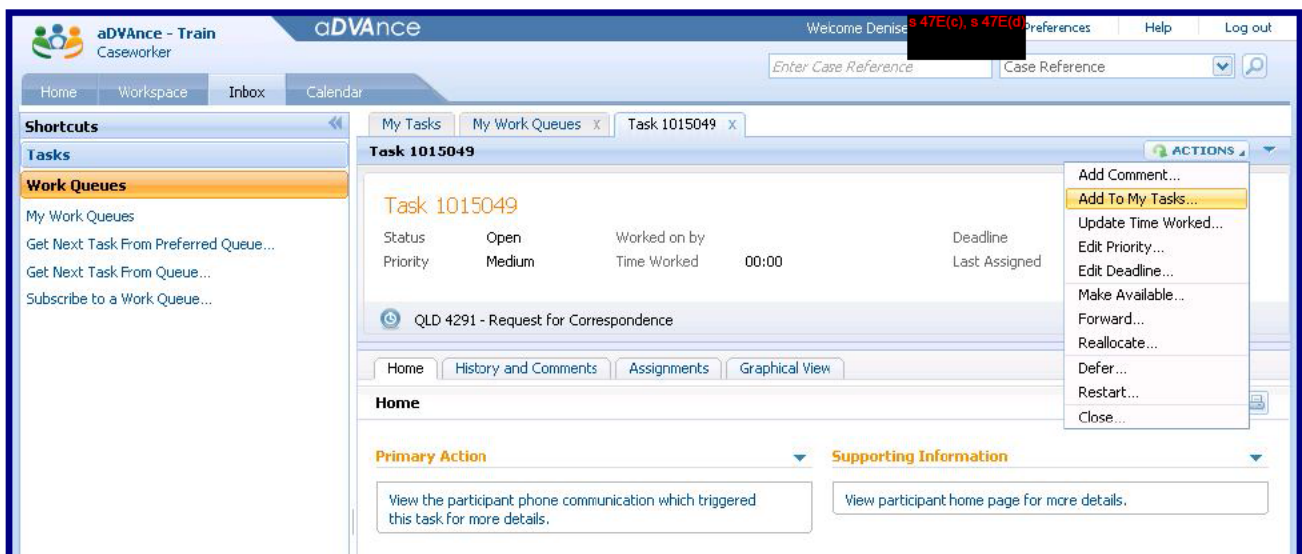
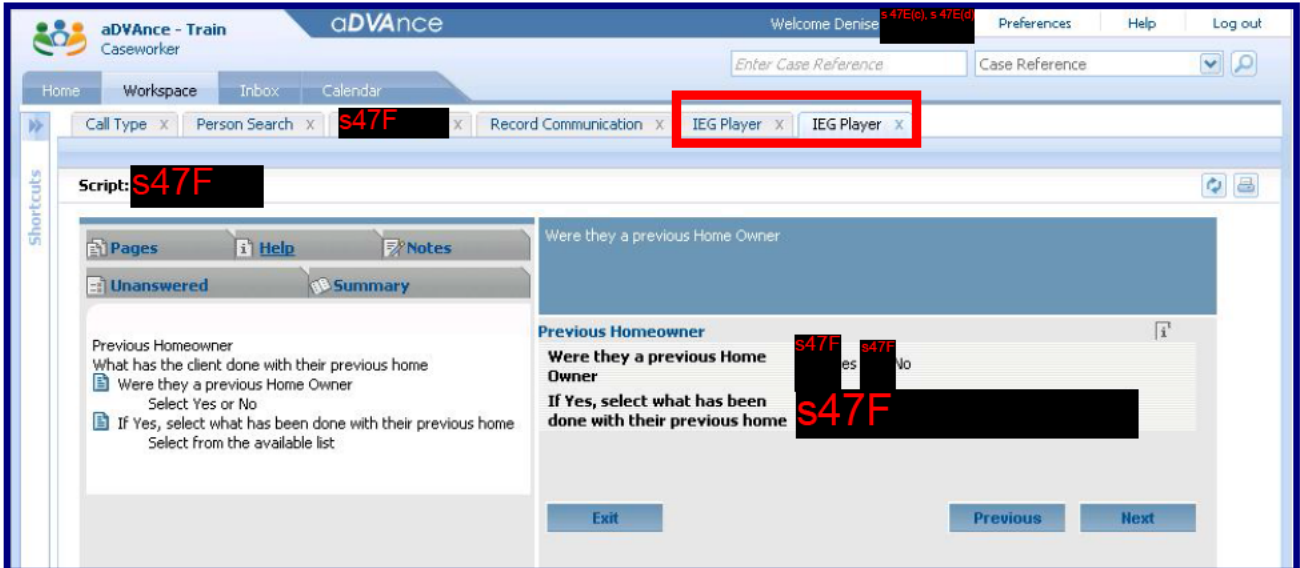The Task action menu displays – click the "Add To My Tasks…" option.

Click **Save & View** and process the task as previously described.

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Trouble Shooting:

If you use [Exit], [Previous], [Summary] or make incorrect selections and a post condition fails a second IEG Player tab can open.

One IEG Player tab will be inactive (with blue font) and the latest IEG Player tab will be active (with black font).

If this occurs click [X] and close the inactive IEG Player tab – the first IEG Player tab in blue font.

Continue recording the communication.

Further Information:

For further information access the aDVAnce Version 6 – Reference Guides section of the aDVAnce Training sharepoint site:

http://dvashare/BusinessUnits/Support/RCSS/BSA/aDVAnce/default.aspx

The aDVAnce Training sharepoint site contains a variety of aDVAnce Version 6 Reference Guides and Powerpoint training presentations.