

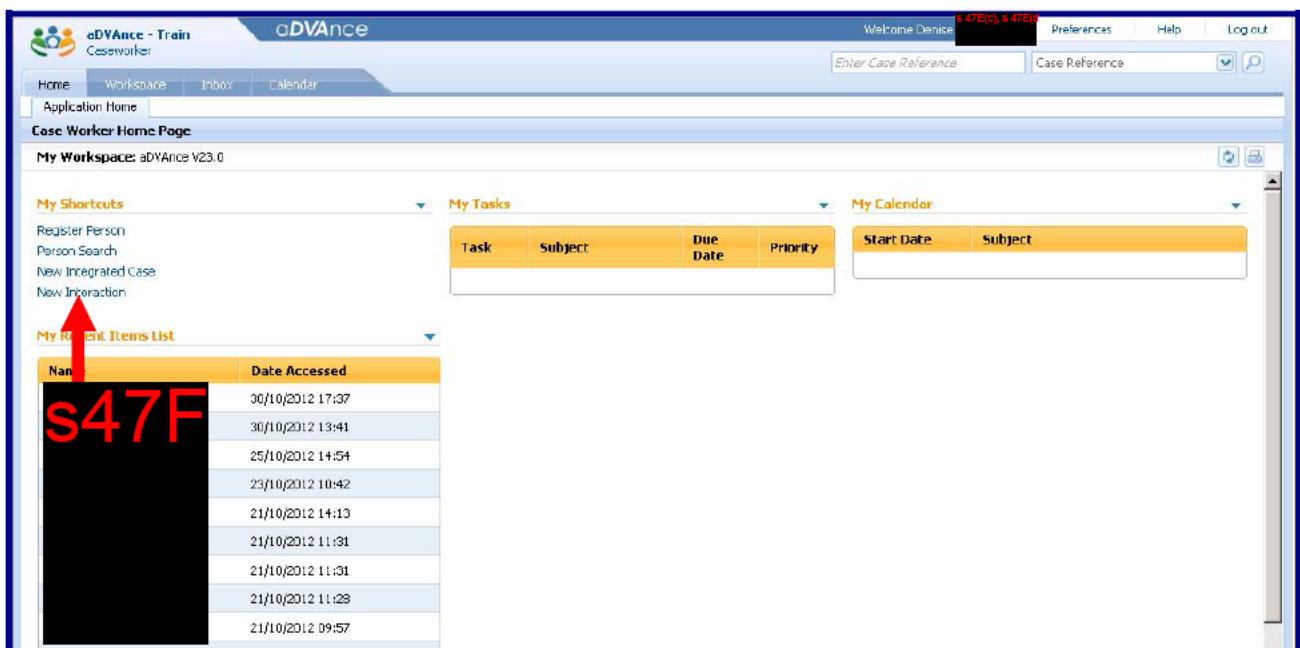
[aDVance Version 6 Upgrade – VAN & OBAS CCF Guide](#)

This guide is designed to assist VAN & OBAS staff understand the changes to CCF and Tasks under the Cúram Version 6 upgrade.

[Daily Housekeeping:](#)

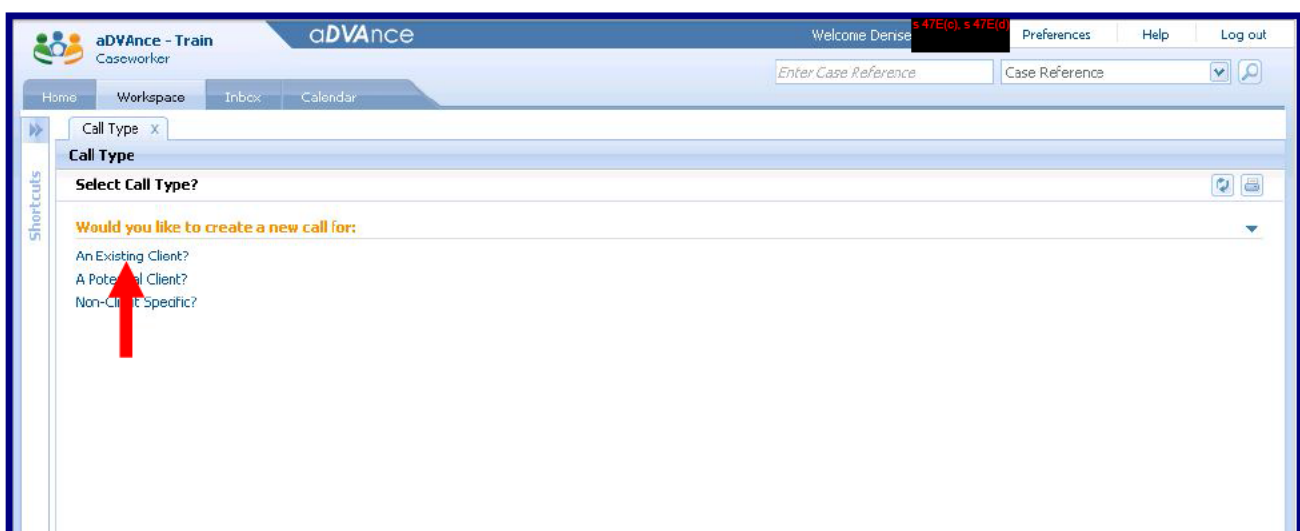
It is recommended that each morning when VAN and OBAS staff first access aDVance they spend one minute to set up their Workspace to their advantage.

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.

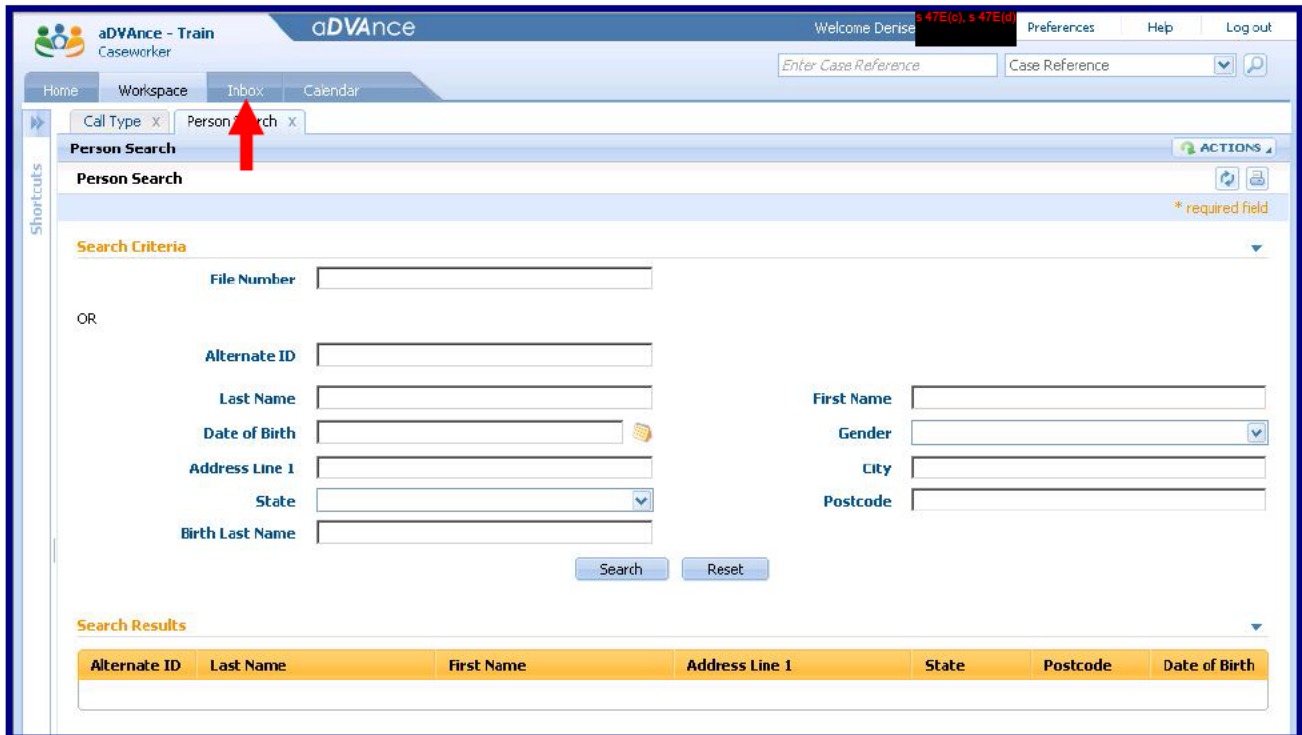


Click the **An Existing Client?** option.

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The Person Search tab opens within your Workspace.

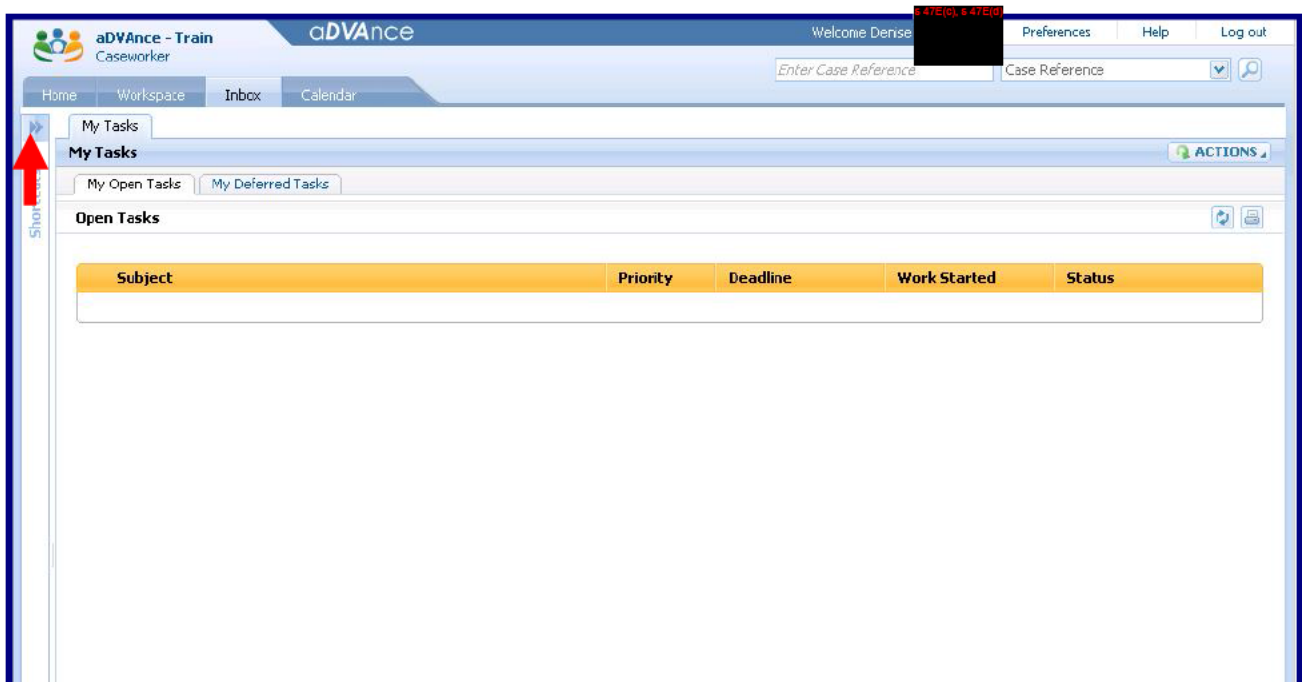
Your Workspace is set for the day – with the Call Type and Person Search tabs open. These tabs should remain open and never closed.



The screenshot shows the aDVance web application interface. At the top, there is a navigation bar with 'Home', 'Workspace', 'Inbox', and 'Calendar' tabs. Below this, there are two active tabs: 'Call Type' and 'Person Search'. A red arrow points to the 'Person Search' tab. The main content area is titled 'Person Search' and contains a search form with the following fields: File Number, Alternate ID, Last Name, Date of Birth, Address Line 1, State, Birth Last Name, First Name, Gender, City, and Postcode. There are 'Search' and 'Reset' buttons at the bottom of the form. Below the form is a 'Search Results' section with a table header containing columns for Alternate ID, Last Name, First Name, Address Line 1, State, Postcode, and Date of Birth.

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

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

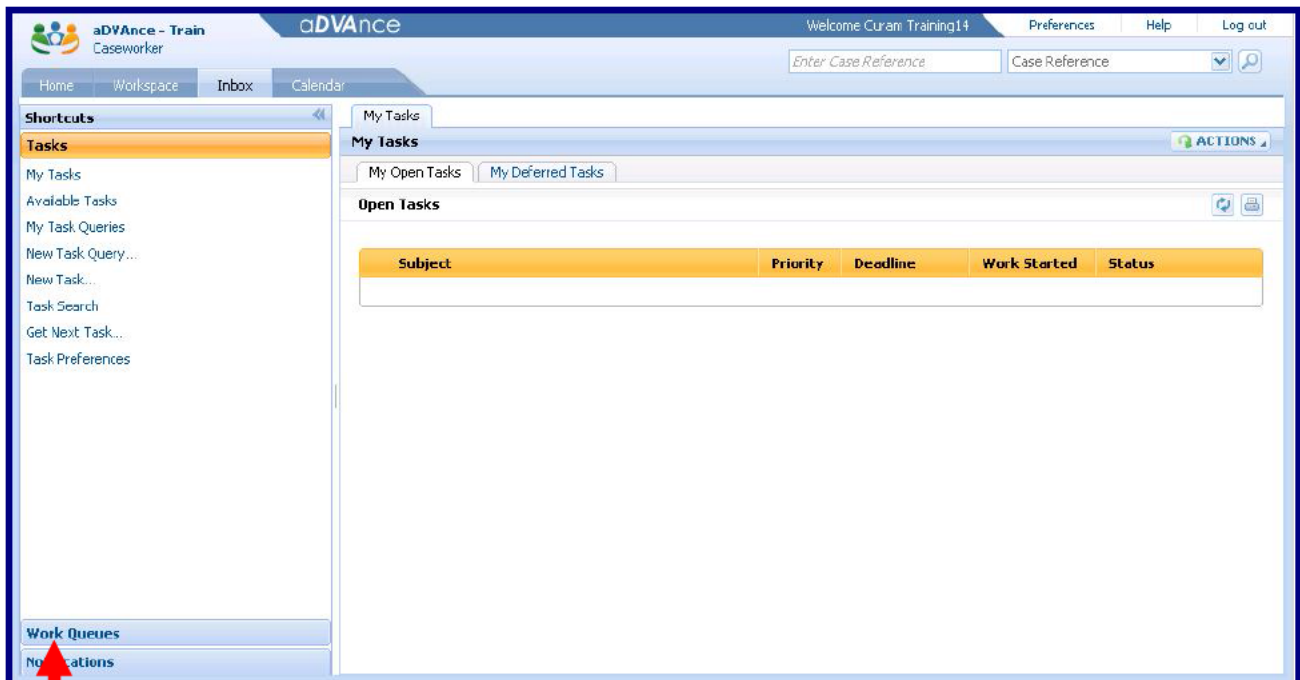


The screenshot shows the aDVance web application interface with the 'Inbox' tab selected. The 'My Tasks' panel is active, showing a sub-tab for 'My Open Tasks'. Below this, there is a table with the following columns: Subject, Priority, Deadline, Work Started, and Status. A red arrow points to the 'Shortcuts' icon in the left sidebar.

To access Work Queues click  the Shortcuts arrows icon.

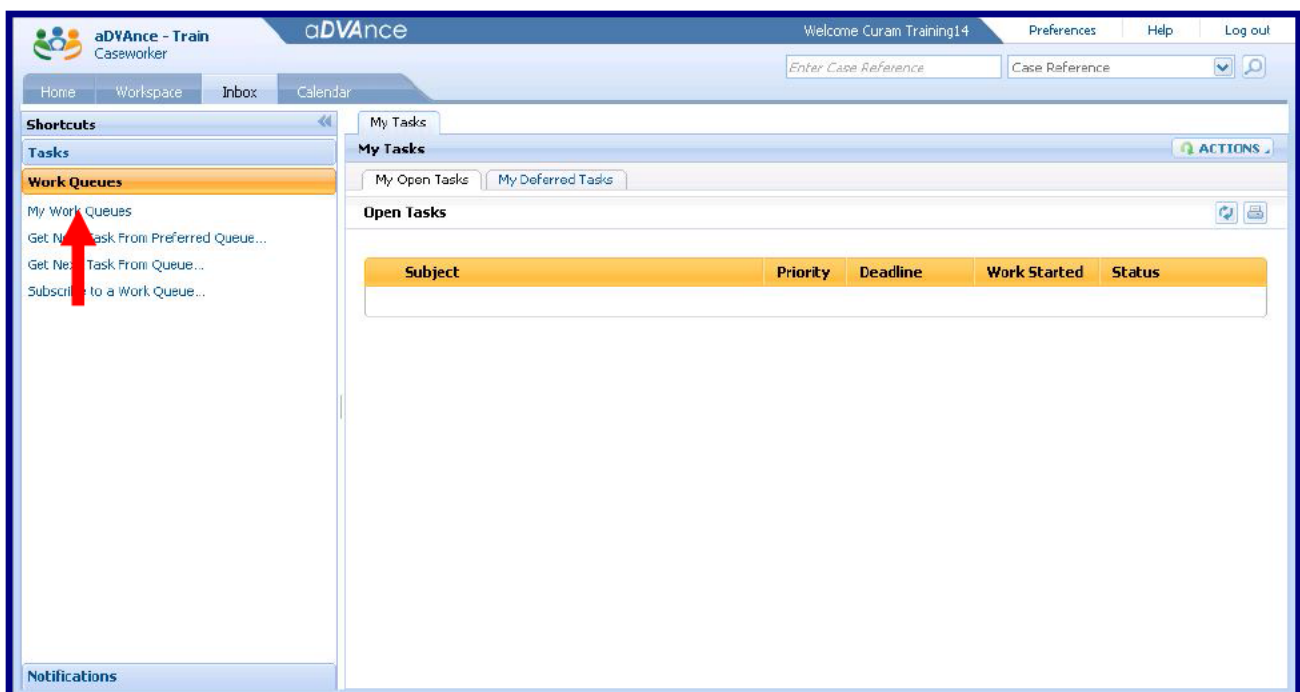
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The Shortcuts panel opens and the Tasks menu is displayed.



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

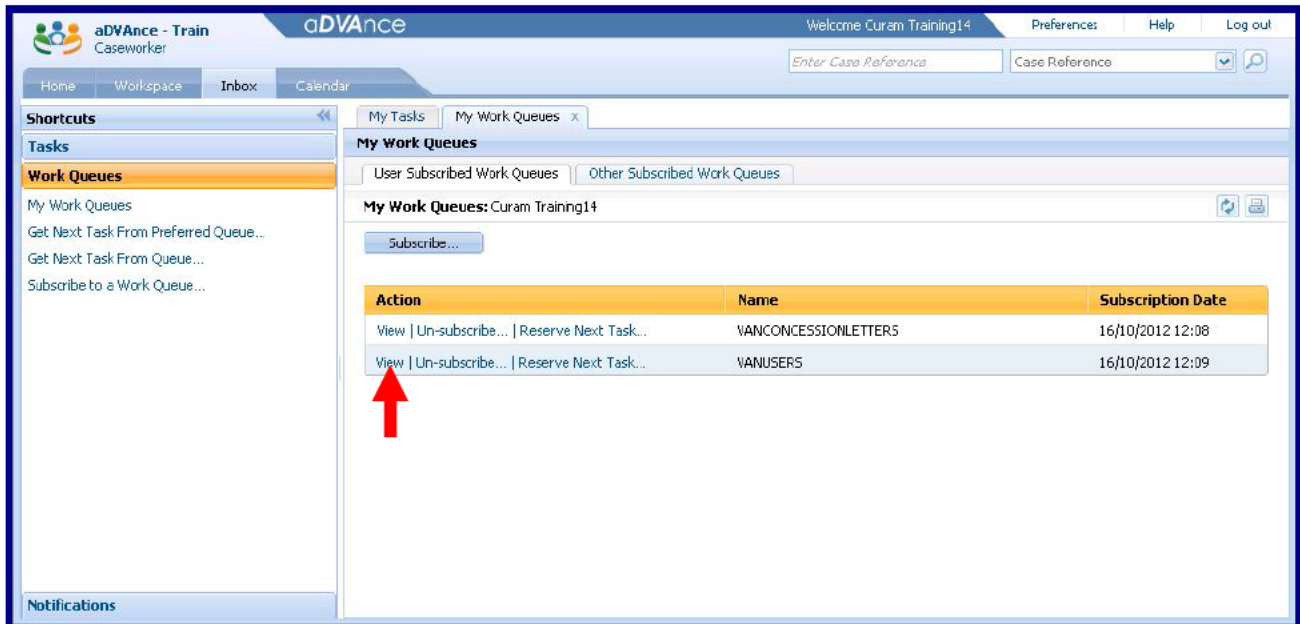
The Tasks menu closes and the Work Queues menu is displayed.



Click **My Work Queues** in the Work Queues menu.

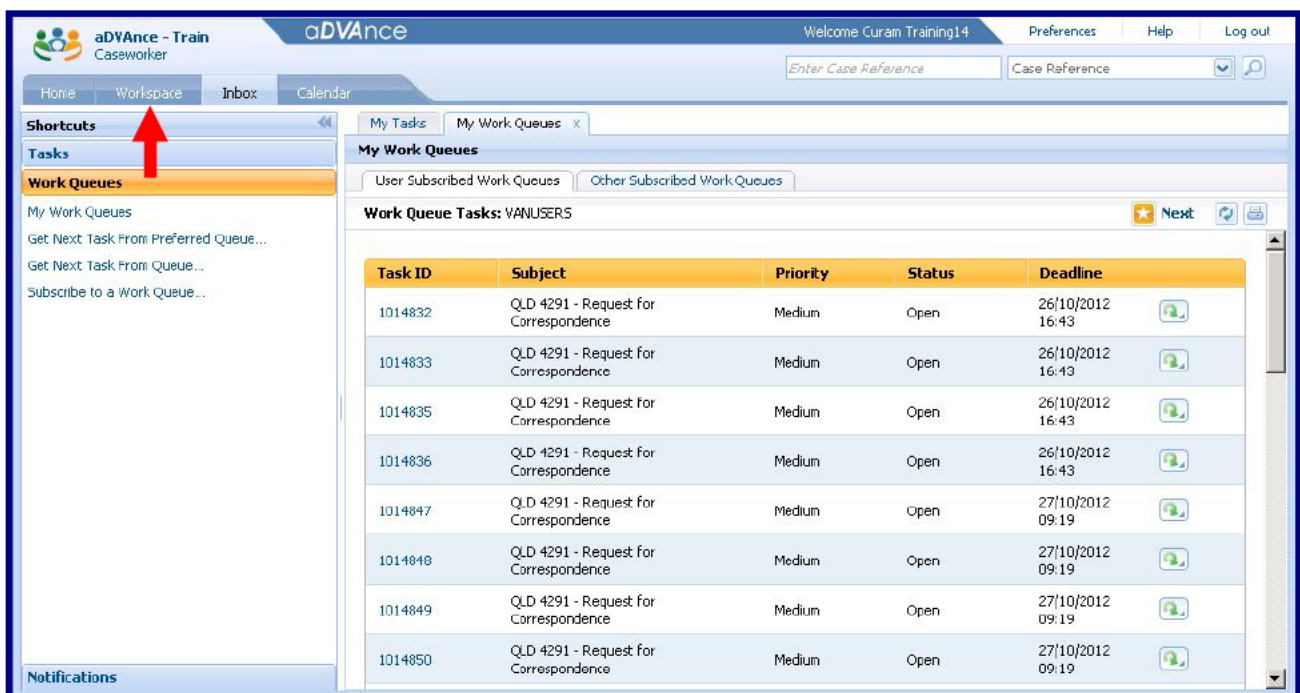
[aDVance Version 6 Upgrade – VAN & OBAS CCF Guide](#)

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



Action	Name	Subscription Date
View Un-subscribe... Reserve Next Task...	VANCONCESSIONLETTERS	16/10/2012 12:08
View Un-subscribe... Reserve Next Task...	VANUSERS	16/10/2012 12:09

View the VANUSERS Work Queue.



Task ID	Subject	Priority	Status	Deadline
1014832	QLD 4291 - Request for Correspondence	Medium	Open	26/10/2012 16:43
1014833	QLD 4291 - Request for Correspondence	Medium	Open	26/10/2012 16:43
1014835	QLD 4291 - Request for Correspondence	Medium	Open	26/10/2012 16:43
1014836	QLD 4291 - Request for Correspondence	Medium	Open	26/10/2012 16:43
1014847	QLD 4291 - Request for Correspondence	Medium	Open	27/10/2012 09:19
1014848	QLD 4291 - Request for Correspondence	Medium	Open	27/10/2012 09:19
1014849	QLD 4291 - Request for Correspondence	Medium	Open	27/10/2012 09:19
1014850	QLD 4291 - Request for Correspondence	Medium	Open	27/10/2012 09:19


Access your Workspace – aDVance has been organised to streamline your work activities.

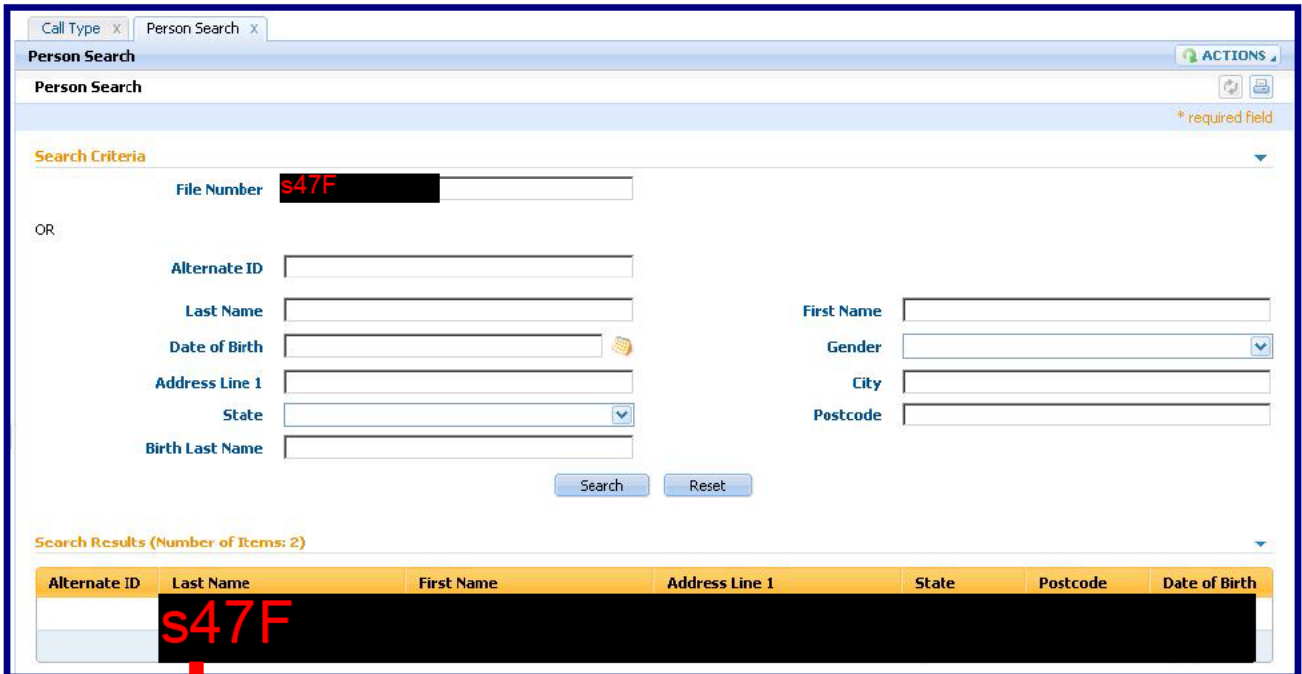
If you need to access the VANCONCESSIONLETTERS Work Queue click **My Work Queues** in the Work Queues menu.

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

[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 .

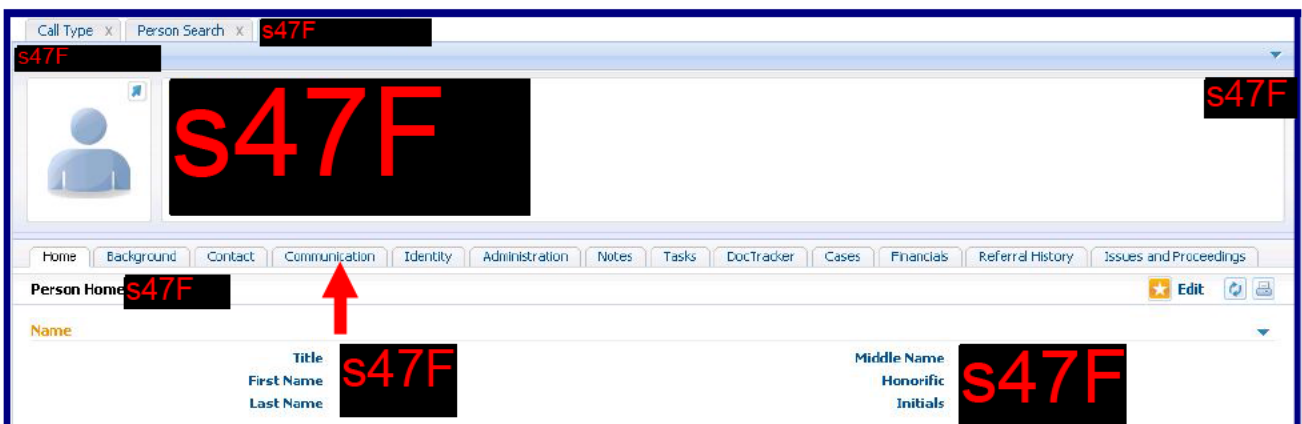


Alternate ID	Last Name	First Name	Address Line 1	State	Postcode	Date of Birth
	s47F					

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.



Home Background Contact **Communication** Identity Administration Notes Tasks DocTracker Cases Financials Referral History Issues and Proceedings

Person Home s47F Edit

Name

Title s47F

Middle Name s47F

First Name

Honorific

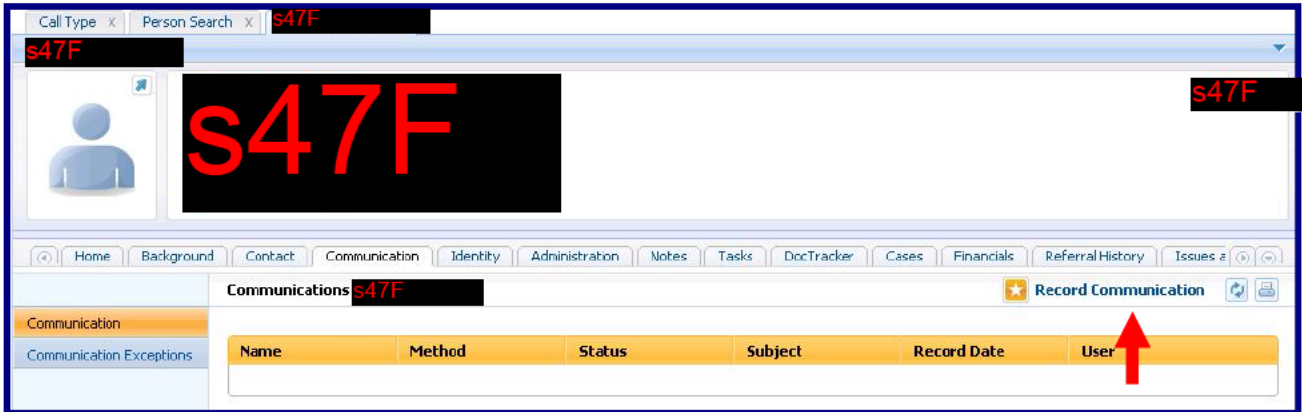
Last Name


Initials

Access the client's Communication tab.

Communication tab:

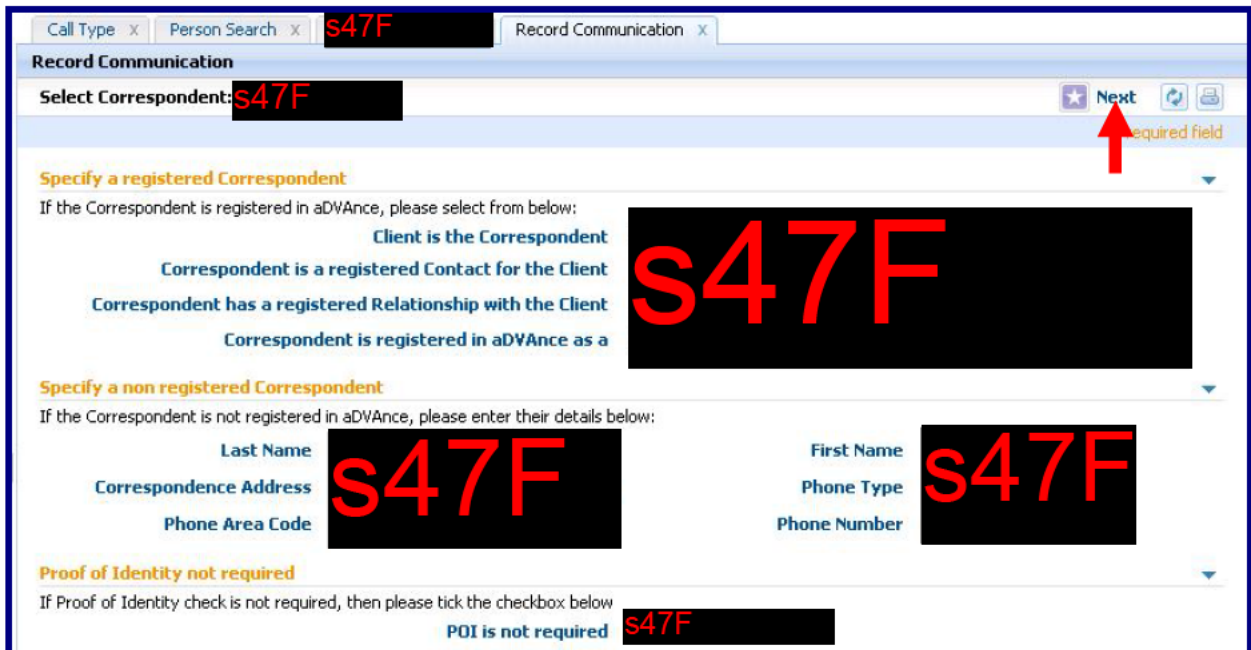
When the Communication tab is accessed the Communications screen automatically opens.





To create a communication click the  action icon.

Select Correspondent screen:

The Record Communication screen opens in a new tab.



Select the Correspondent and click .

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

Verify Correspondent screen:

Record Communication
Verify Correspondent: s47F

Previous Next

required field

Proof of Identity Check
Please verify the details and record the identity verification result

Personal Details

POI: s47F

UIN: s47F

Title: s47F

First Name: s47F


Middle Name: s47F

Last Name: s47F

Address

Residential Address: s47F

Mailing Address: s47F

Perform the standard Proof of Identity Check - click .

Client Contact Topics screen:

Record Communication
Client Contact Topics: s47F

Previous Next

* required field

Search Communication Topics

Search Criteria

Method: s47F

Direction: s47F

Category: s47F

Search Reset


Search Results (Number of Items: 0)

Action	Category	Topic	Method	Direction
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Other Correspondence

If the correspondence is not covered by the topics above, then please enter the details below.

Other Correspondence: s47F

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

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Record Communication

Client Contact Topics: s47F

Search Communication Topics

Search Criteria

Method: s47F Direction: s47F

Search Results (Number of Items: 10)

Action	Category	Topic	Method	Direction
Launch	Common			
Launch	Common			
Launch	Common			
Launch	Common			
Launch	Common			
Launch	Common			
Launch	Common			
Launch	Common			
Launch	Common			
Launch	Common			

Launch the required CCF script.

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

Script: s47F

Select if treatment card is to be replaced

Card Type

Treatment Card: s47F Yes s47F No

Income Support Card: s47F Yes s47F No

Exit Next

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.

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Call Type x Person Search x s47F x Record Communication x IEG Player x

Script: s47F

Pages Help Notes

Unanswered Summary


Treatment Cards
Treatment Cards
Gold Card
Select Yes or No
White Card
Select Yes or No
Orange Card
Select Yes or No

Gold Card Replacement

Treatment Cards

	Yes	No
Gold Card	s47F	s47F
White Card	Yes	No
Orange Card	Yes	No

Exit Previous Next

Continue answering the script questions and click .

Call Type x Person Search x s47F x Record Communication x IEG Player x

Script: s47F

Pages Help Notes

Unanswered Summary

s47F

Reason cards needs replacing



Replacement Reason

Was the Replacement Card successfully requested using View? s47F Yes s47F No

Replacement Reason s47F

Exit Previous Next

Continue answering the script questions.

Access the  tab and paste the File Number. Click .

Recording the DVA File Number:

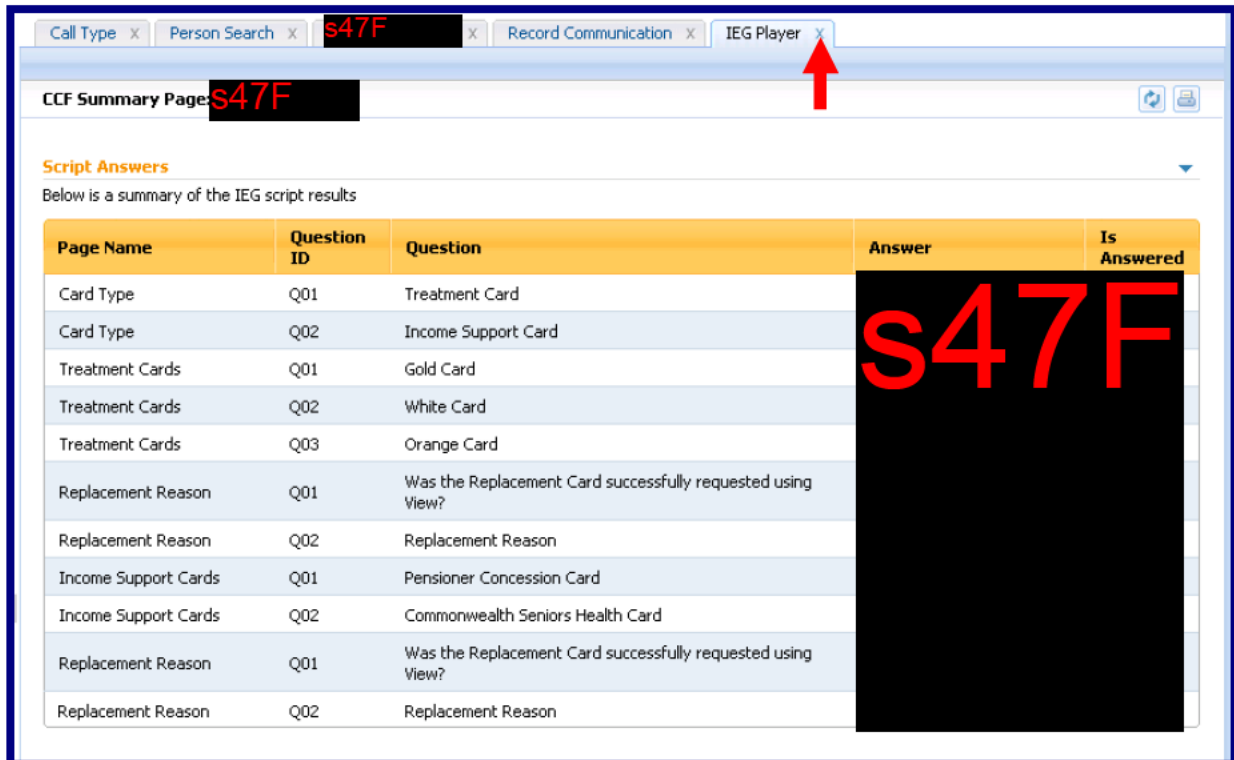
Recommendation - Record the File Number in the Notes tab.



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.

[CCF Summary screen:](#)

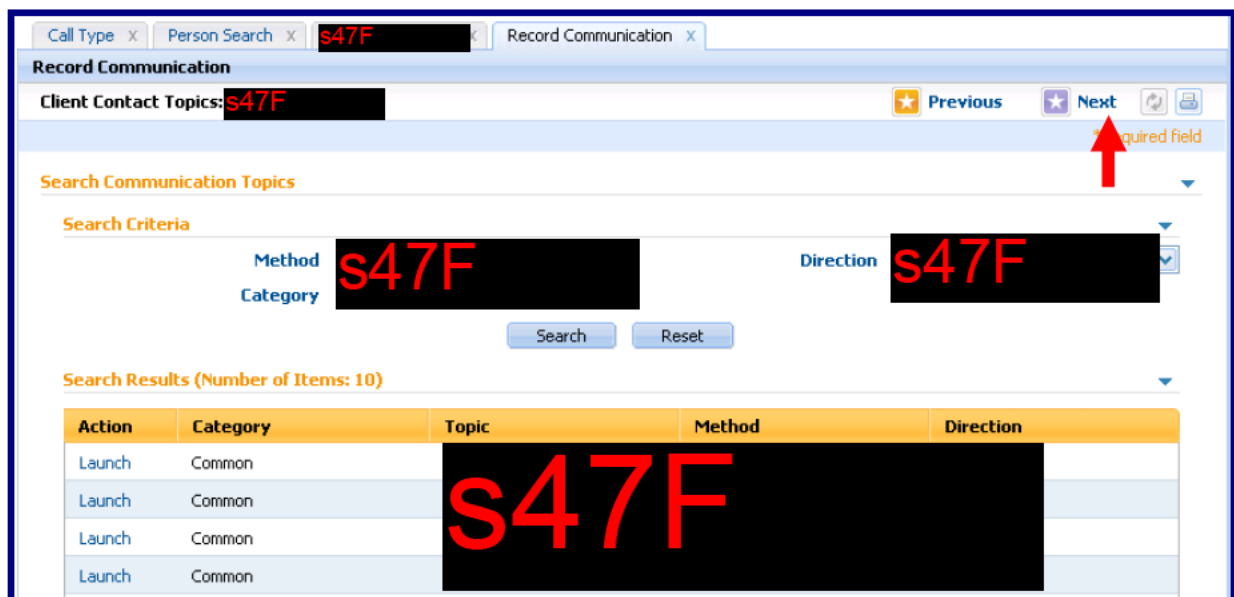
The final page of every CCF script is the CCF Summary Page.




Close  the IEG Player tab by clicking the .

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

You are returned to the Record Communication tab.



Launch and complete any further scripts. Once finished click .

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Create Communication Record screen:

Record Communication

Create Communication Record: s47F

Save

required field

Communication Details

Direction
Method
Status

Communication Date
Recorded By
Linked Communication

Communication Text

Subject

Communication Text

Correspondent Details


Correspondent Name
Address
Email Address

Correspondent Type
Identity Verified
Fax/Phone Number

Call Transfer Details

Transfer Required
Transfer Reason
Transfer To

Comments

The communication is complete - click .

You are returned to the Record Communication tab.

aDVance - Train Caseworker

Welcome Curam Training14

Preferences Help Log out

Enter Case Reference Case Reference

Home Workspace Inbox Calendar


Call Type x Person Search x s47F x Record Communication x

Record Communication

Communications s47F

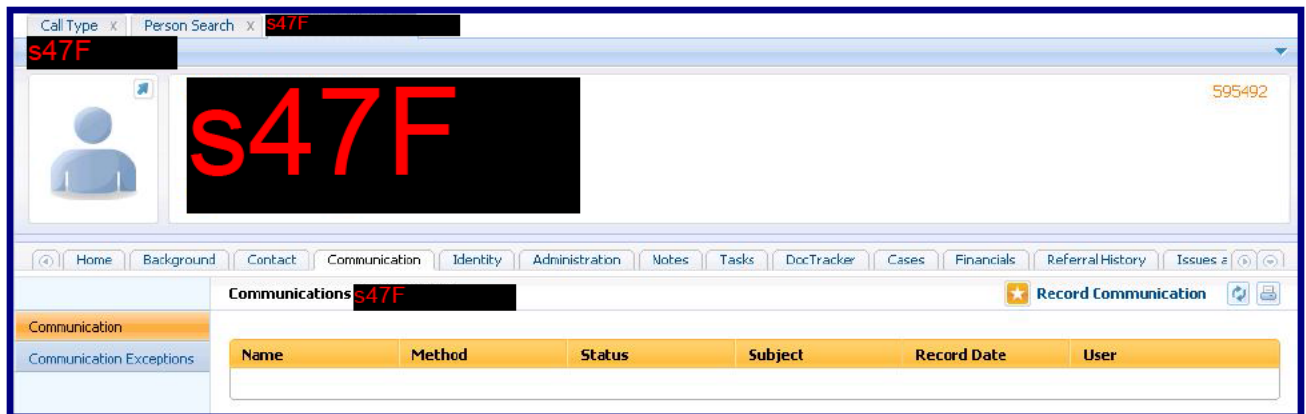
Record Communication

Name	Method	Status	Subject	Record Date	User
s47F				31/10/2012 17:41	s 47E(d)

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

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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

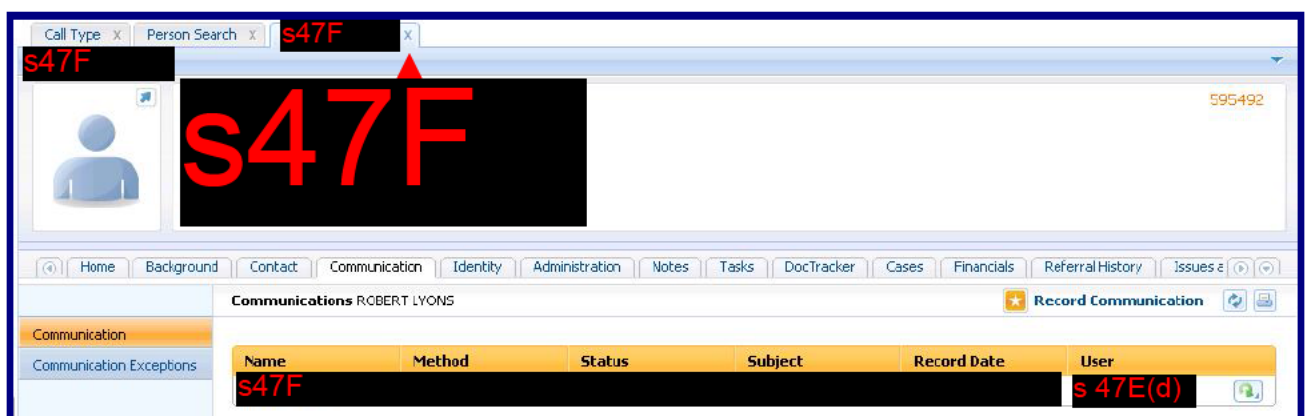
The communication was displayed on the Record Communication tab – trust your actions and click  to close the client's tab.


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:

The screenshot shows the aDVance Person Search interface. The 'File Number' field contains 's 47F'. Below the search criteria, there are buttons for 'Search' and 'Reset'. A red arrow points to the 'Reset' button. The search results table below shows one result with 's47F' in the 'Alternate ID' column.

Alternate ID	Last Name	First Name	Address Line 1	State	Postcode	Date of Birth
s47F						

Click  to clear the Person Search tab.

The screenshot shows the aDVance Person Search interface with all search criteria fields empty. The 'Reset' button is still visible at the bottom of the search criteria section.

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 accidentally 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.

Script: s47F

Pages Help Notes

Unanswered Summary

Client Details for Address Change
Select all that apply or use Other to record someone else

- Veteran
Select Yes or No
- Spouse
Select Yes or No
- Defacto
Select Yes or No
- Children
Select Yes or No
- Other
eg (Grandmother, Power of Attorney, etc)

	Yes	No
Veteran	s47F	s47F
Spouse	Yes	No
Defacto	Yes	No
Children	Yes	No
Other	s47F	

Exit Next

Answer YES to Veteran and click [Next](#).

Script: s47F

Pages Help Notes

Unanswered Summary

Address Update Details
Enter details of the new address

- Was the client address successfully updated using IQ Rapid?
If the address was not successfully updated using IQ Rapid, please enter the full details below.
- Residential Address
Select Yes or No
- Correspondence address
Select Yes or No
- Business Address
Select Yes or No
- Is this an overseas address
Select Yes or No
- Moving interstate
Select from the available list
- From what date does the change apply
eg (DD/MM/YYYY)
- Changing Phone Number
Select Yes or No

Was the client address successfully updated using IQ Rapid?

	Yes	No
Was the client address successfully updated using IQ Rapid?	s47F	s47F
Residential Address	Yes	No
Correspondence address	Yes	No
Business Address	Yes	No
Is this an overseas address	Yes	No
Moving interstate		
From what date does the change apply		
Changing Phone Number	s47F	s47F

Link to Client Address page

Was the client address successfully updated using IQ Rapid?

Residential Address

Correspondence address

Business Address

Is this an overseas address

Moving interstate

From what date does the change apply

Changing Phone Number

If Residential Address is changing, please complete a Replacement Card Recording

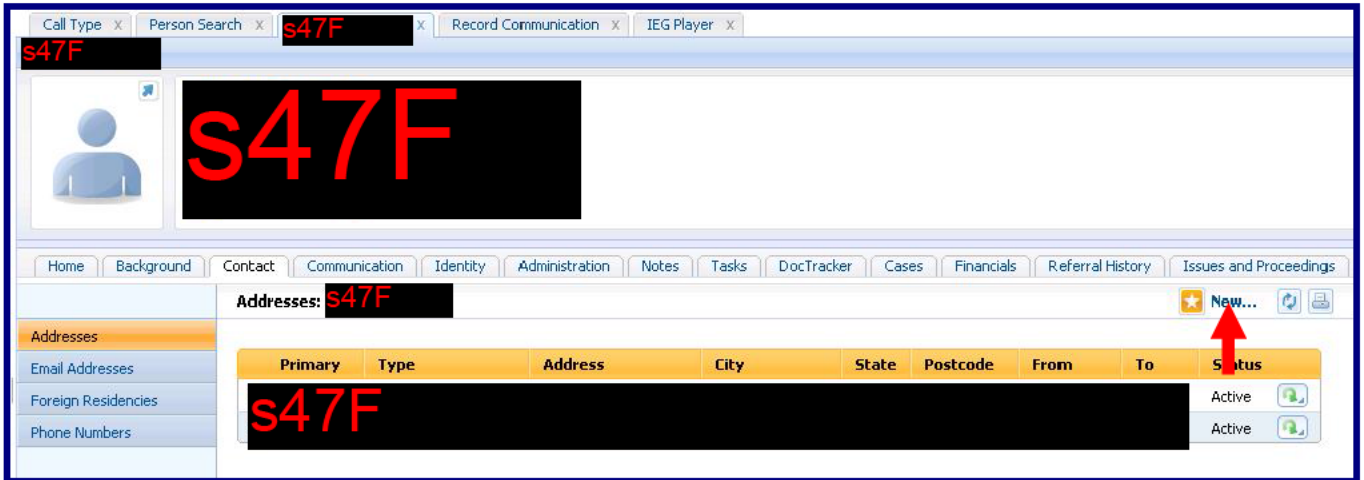
Exit Previous Next


Click the **“Link to Client Address page”** hyperlink.

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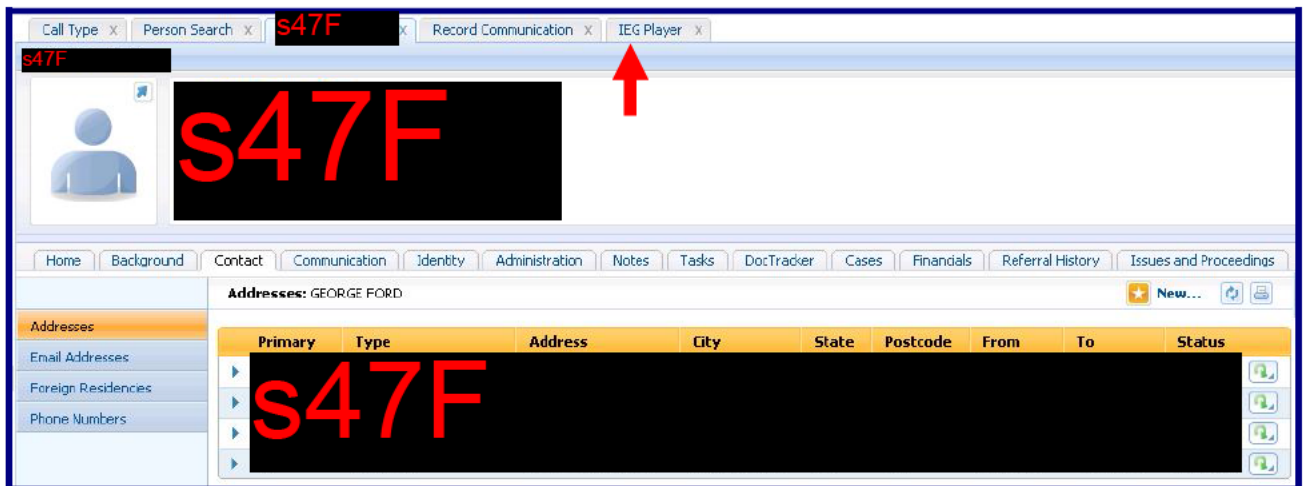
Step 2 - Access the client's Addresses screen and perform the address change using IQ Rapid;

You are taken to the Addresses screen in the client's tab.



Click  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:



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

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

You are returned to the Change of Address script.

The screenshot shows a software interface for recording a communication. The top window title bar includes tabs for 'Call Type', 'Person Search', 'S47F', 'Record Communication', and 'IEG Player'. The main window title is 'Script: S47F'. On the left, there is a navigation pane with sections: 'Pages', 'Help', 'Notes', 'Unanswered', and 'Summary'. Below this, there is a list of 'Address Update Details' with sub-sections: 'Enter details of the new address', 'Was the client address successfully updated using IQ Rapid?', 'Residential Address', 'Correspondence address', 'Business Address', 'Is this an overseas address', 'Moving interstate', 'From what date does the change apply', and 'Changing Phone Number'. The main content area on the right is titled 'Address Update Details' and contains a form with the same questions as the left pane. The form is partially obscured by a large black redaction box with 'S47F' written in red. At the bottom of the form, there are 'Exit', 'Previous', and 'Next' buttons.

Continue recording and save the communication as detailed earlier.

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

Click  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 Circumstances – 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.


The screenshot shows the aDVance Train Caseworker interface. The 'My Work Queues' section is active, displaying a table of tasks for the 'VANUSERS' work queue. The table has the following columns: Task ID, Subject, Priority, Status, and Deadline. A red arrow points to the 'Reserve...' icon in the first row of the table.


Task ID	Subject	Priority	Status	Deadline	Action
1014832	QLD 4291 - Request for Correspondence	Medium	Open	26/10/2012 16:43	Reserve...
1014833	QLD 4291 - Request for Correspondence	Medium	Open	26/10/2012 16:43	Reserve...
1014835	QLD 4291 - Request for Correspondence	Medium	Open	26/10/2012 16:43	Reserve...
1014836	QLD 4291 - Request for Correspondence	Medium	Open	26/10/2012 16:43	Reserve...
1014847	QLD 4291 - Request for Correspondence	Medium	Open	27/10/2012 09:19	Reserve...
1014848	QLD 4291 - Request for Correspondence	Medium	Open	27/10/2012 09:19	Reserve...
1014849	QLD 4291 - Request for Correspondence	Medium	Open	27/10/2012 09:19	Reserve...
1014850	QLD 4291 - Request for Correspondence	Medium	Open	27/10/2012 09:19	Reserve...

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

The task's Action icon displays  click Reserve.

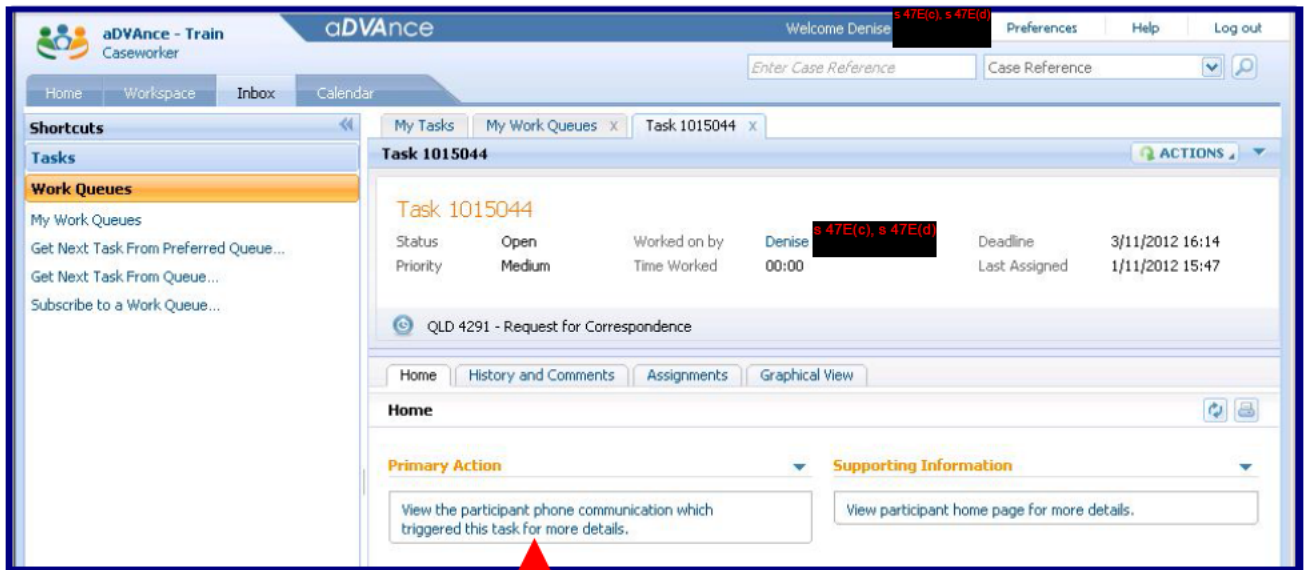
The 'Add to My Tasks' dialog box is shown. It has a 'Comment' field and three buttons: 'Save & View', 'Save', and 'Cancel'. A red arrow points to the 'Save & View' button.

Click  to reserve the task and process it.

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

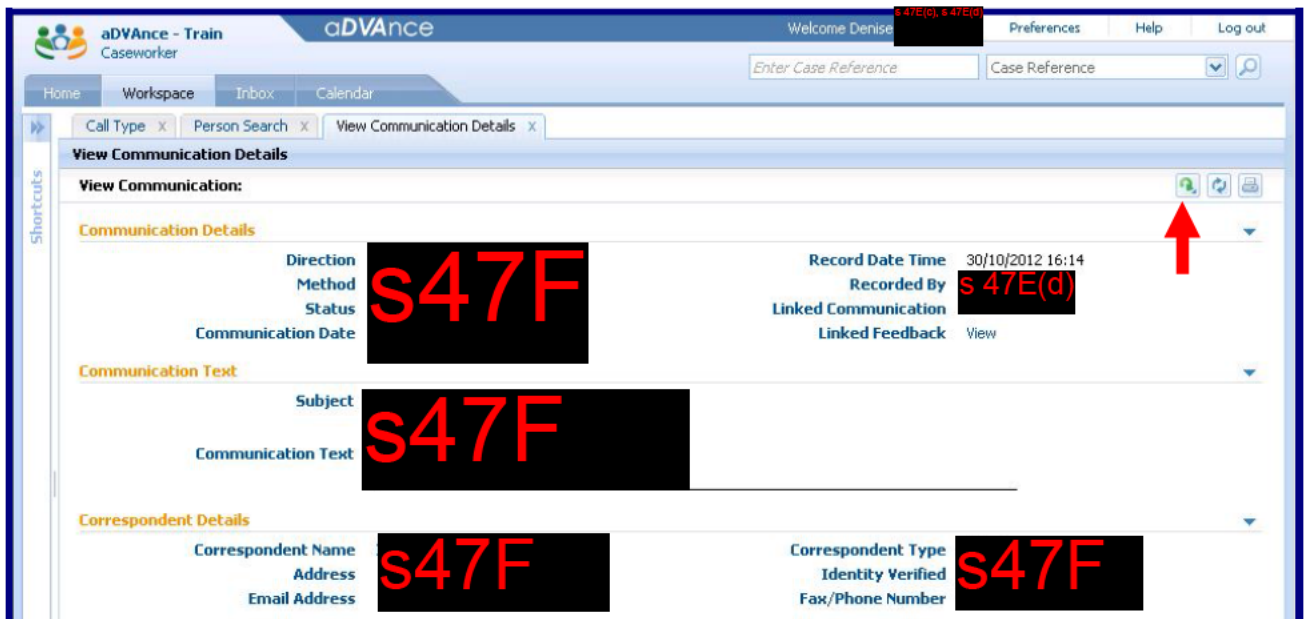
[aDVance Version 6 Upgrade – VAN & OBAS CCF Guide](#)

The Reserved Task opens in a new tab in your Inbox.

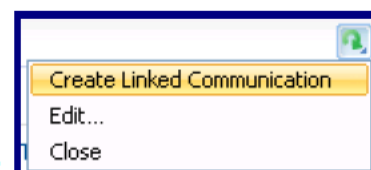



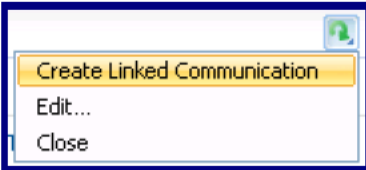
Select the Primary Action – “View the participant phone communication which triggered this task for more details” link.

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  the actions icon, which displays  - click **Create Linked Communication**.

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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.

Record Communication

Select Correspondent: null Next required field

Specify a registered Correspondent

If the Correspondent is registered in aDVance, please select from below:

- Client is the Correspondent
- Correspondent is a registered Contact for the Client
- Correspondent has a registered Relationship with the Client
- Correspondent is registered in aDVance as a

Specify a non registered Correspondent

If the Correspondent is not registered in aDVance, please enter their details below:

Last Name First Name

Correspondence Address Phone Type

Phone Area Code Phone Number

Proof of Identity not required

If Proof of Identity check is not required, then please tick the checkbox below

POI is not required s47F

Click Next.

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

Record Communication

Client Contact Topics: null Previous Next required field

Search Communication Topics

Search Criteria

Method Direction

Category

Search Results (Number of Items: 0)

Action	Category	Topic	Method	Direction
--------	----------	-------	--------	-----------

Other Correspondence

If the correspondence is not covered by the topics above, then please enter the details below.

Other Correspondence

s47F

Click Next.

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Create Communication Record screen:

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

Record Communication

Create Communication Record: null

Save

Communication Details

Direction s47F

Method s47F

Status s47F

Communication Date 1/11/2012

Recorded By s 47E(d)

Linked Communication Request Forms and Publications

Communication Text

Subject s47F

Communication Text s47F

Correspondent Details

Correspondent Name s47F

Address s47F

Email Address s47F

Correspondent Type s47F

Identity Verified s47F

Fax/Phone Number s47F

Associated Files

File Location


Document Location

File

File Reference

Document Reference

Comments

Check for completeness and then click .


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


Record Communication

Communications s 47F

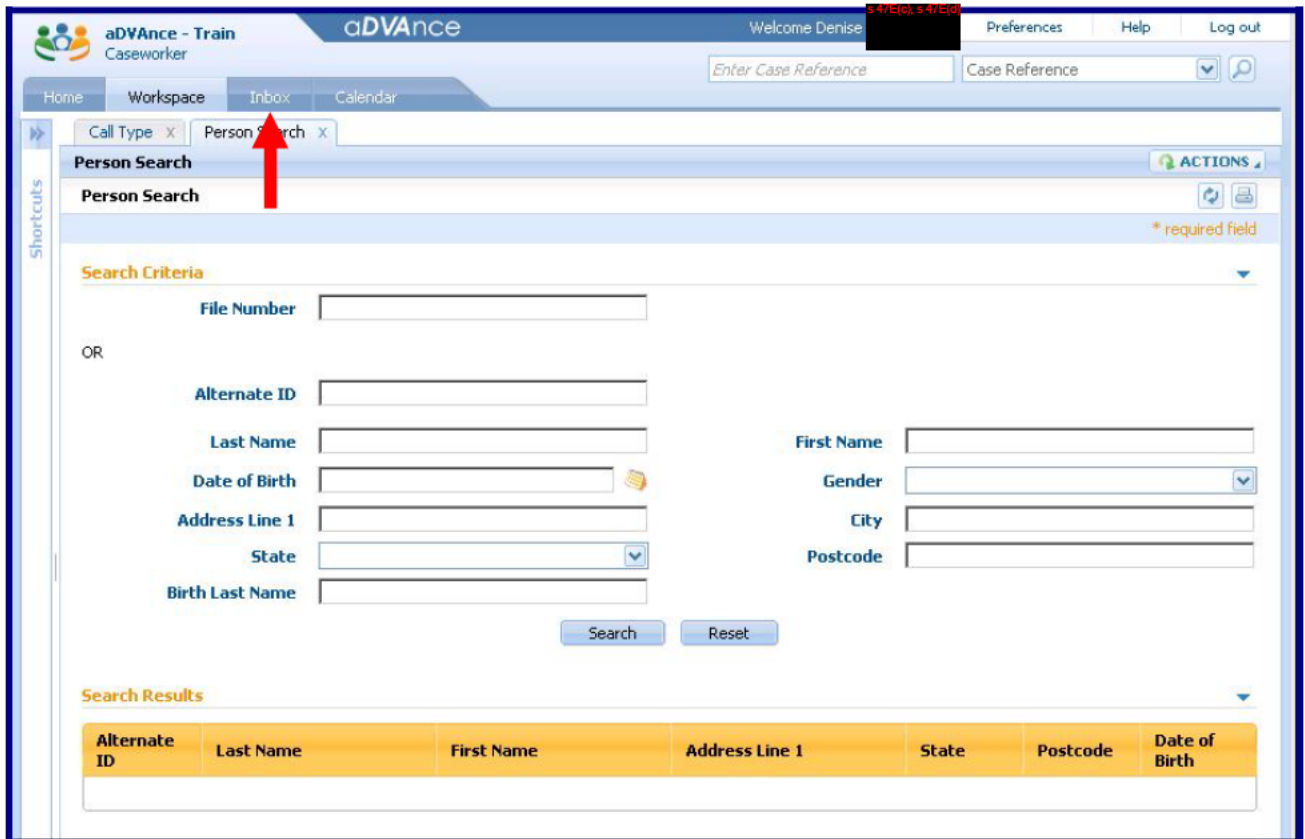
Record Communication

Name	Method	Status	Subject	Record Date	User
s47F	s47F	s47F	s47F	s47F	s 47E(d)

Click  to close the Record Communication tab.

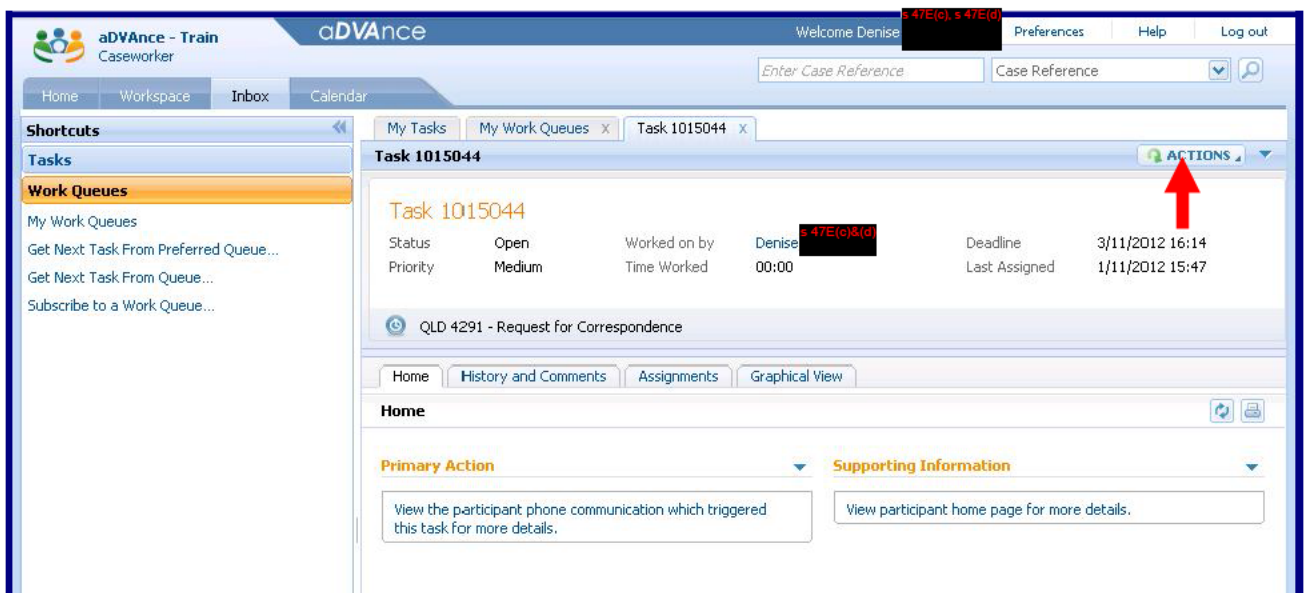
Click  to close the View Communication Details tab.

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The screenshot shows the aDVance Train Caseworker interface. The top navigation bar includes 'Home', 'Workspace', 'Inbox', and 'Calendar'. The 'Person Search' tab is selected, and a red arrow points to it. The main content area is titled 'Person Search' and contains a 'Search Criteria' section with various input fields: File Number, Alternate ID, Last Name, Date of Birth, Address Line 1, State, Birth Last Name, First Name, Gender, City, and Postcode. There are 'Search' and 'Reset' buttons at the bottom of the search criteria section. Below the search criteria is a 'Search Results' section with a table header: Alternate ID, Last Name, First Name, Address Line 1, State, Postcode, and Date of Birth.

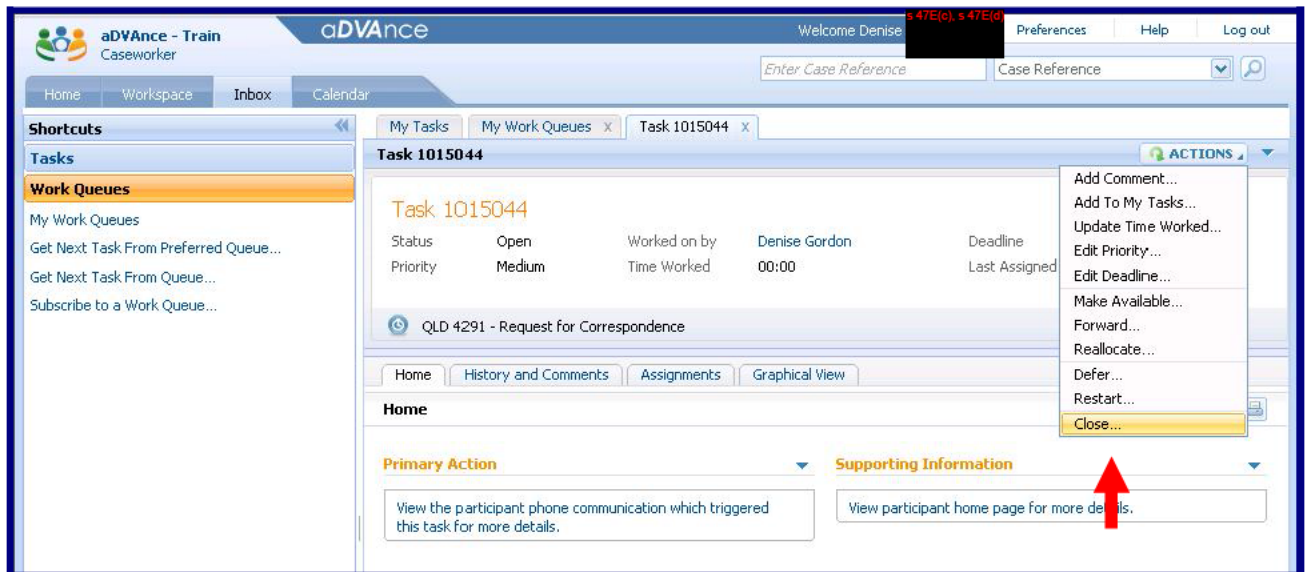
The final step is to close the Task – return to your Inbox tab.



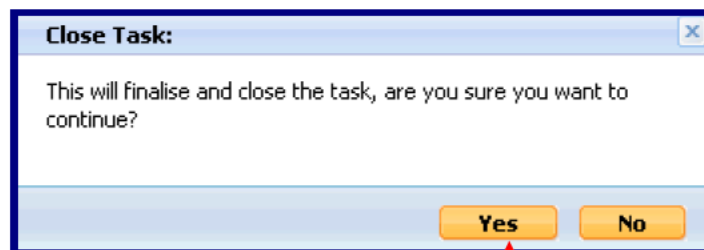
The screenshot shows the aDVance Train Caseworker interface with the 'Task 1015044' details view. The top navigation bar includes 'Home', 'Workspace', 'Inbox', and 'Calendar'. The 'Task 1015044' tab is selected, and a red arrow points to the 'ACTIONS' icon in the top right corner of the task details panel. The task details include: Status: Open, Priority: Medium, Worked on by: Denise, Deadline: 3/11/2012 16:14, and Last Assigned: 1/11/2012 15:47. Below the task details is a 'Primary Action' section with a button labeled 'View the participant phone communication which triggered this task for more details.' and a 'Supporting Information' section with a button labeled 'View participant home page for more details.'

Click  the Task actions icon.

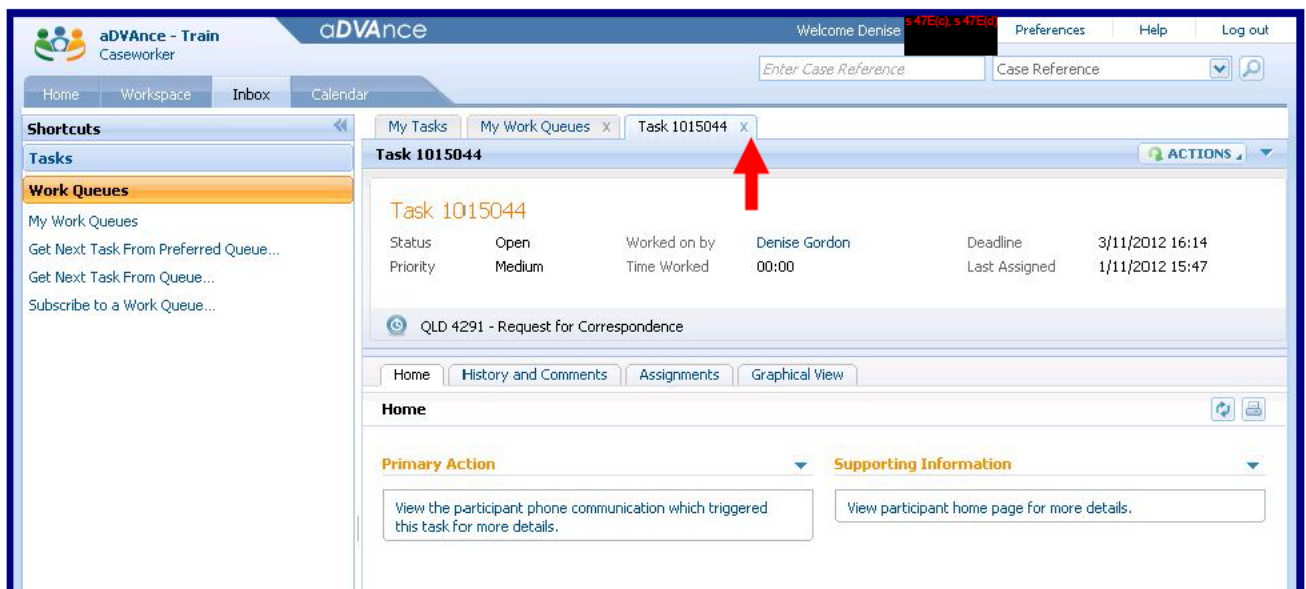
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The Task actions menu displays - click Close to close the task.



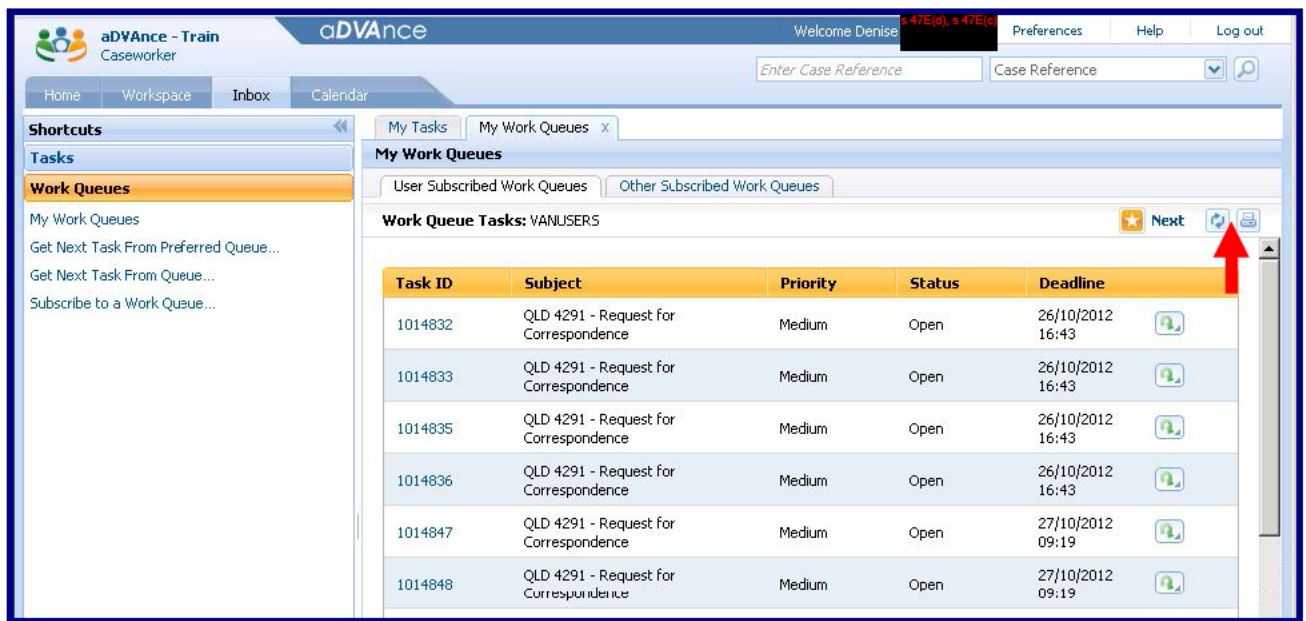
Click **Yes** to confirm the task closure.



The task has been closed but still displays Open status. Click **x** to close the Task tab.


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You are returned to your My Work Queues screen.



The screenshot shows the 'My Work Queues' screen in the aDVance Caseworker interface. The table below represents the data shown in the 'Work Queue Tasks' section:

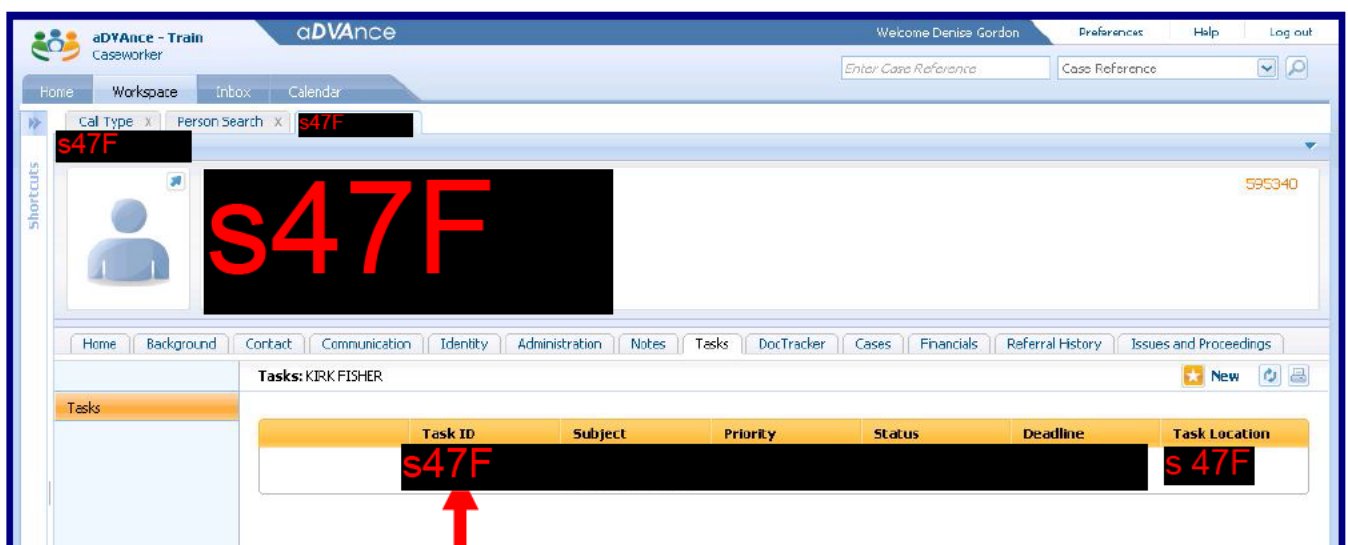
Task ID	Subject	Priority	Status	Deadline
1014832	QLD 4291 - Request for Correspondence	Medium	Open	26/10/2012 16:43
1014833	QLD 4291 - Request for Correspondence	Medium	Open	26/10/2012 16:43
1014835	QLD 4291 - Request for Correspondence	Medium	Open	26/10/2012 16:43
1014836	QLD 4291 - Request for Correspondence	Medium	Open	26/10/2012 16:43
1014847	QLD 4291 - Request for Correspondence	Medium	Open	27/10/2012 09:19
1014848	QLD 4291 - Request for Correspondence	Medium	Open	27/10/2012 09:19

To continue processing Work Queue tasks click  to refresh the Work Queue.

If there are multiple pages of tasks within the Work queue click  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.



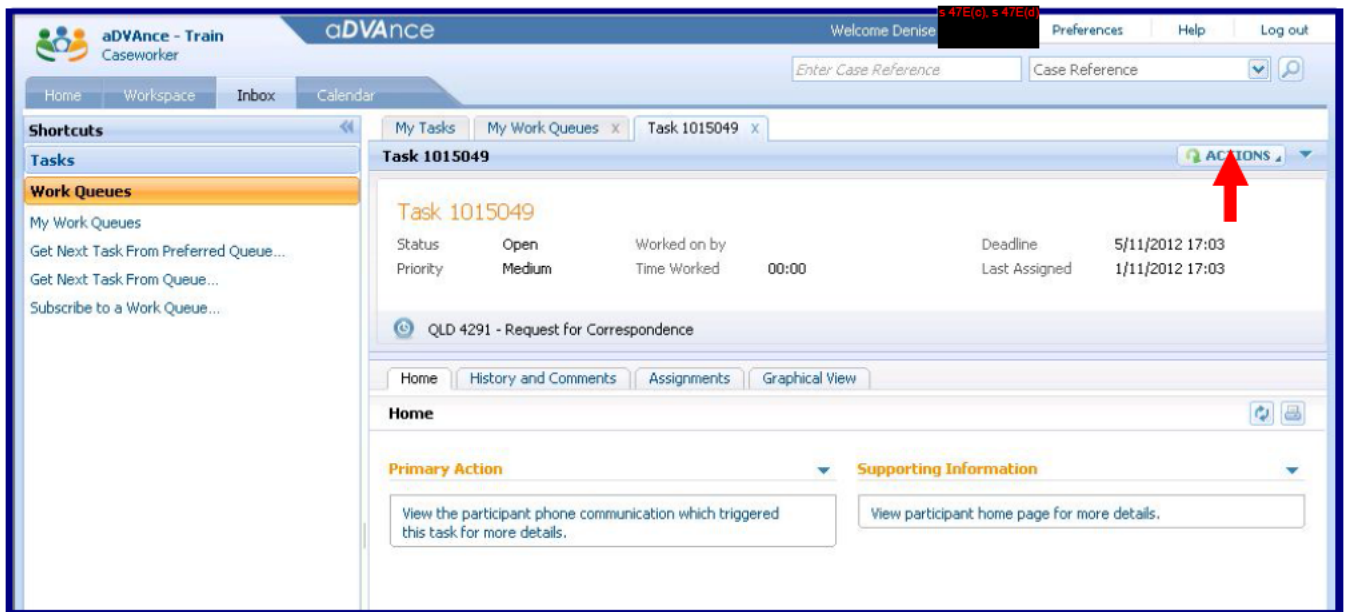
The screenshot shows the 'Tasks: KIRK FISHER' screen in the aDVance Caseworker interface. The table below represents the data shown in the 'Tasks' section:

Task ID	Subject	Priority	Status	Deadline	Task Location
s47F					s47F

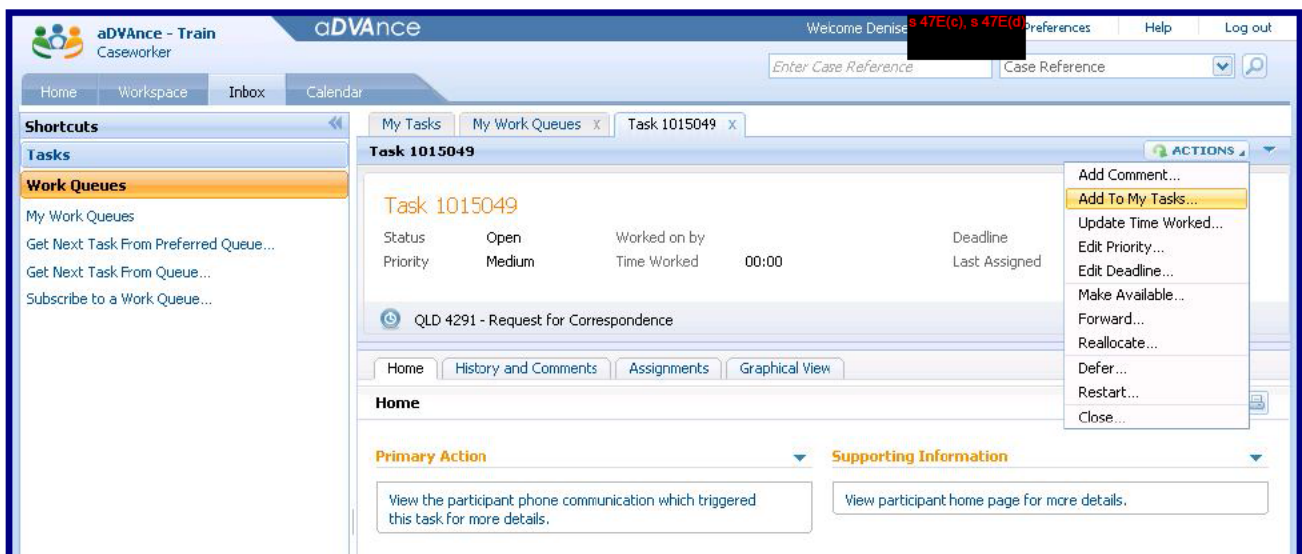
From the client's Tasks screen click the Task ID Number link.

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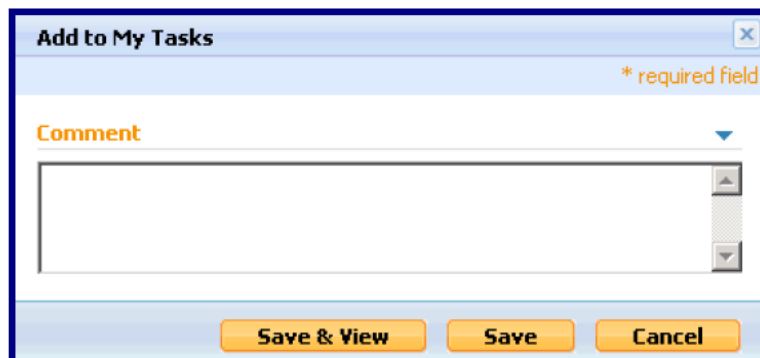
The task opens in a new tab in your Inbox.



Click **ACTIONS** the Task actions icon.



The Task action menu displays – click the “Add To My Tasks...” option.

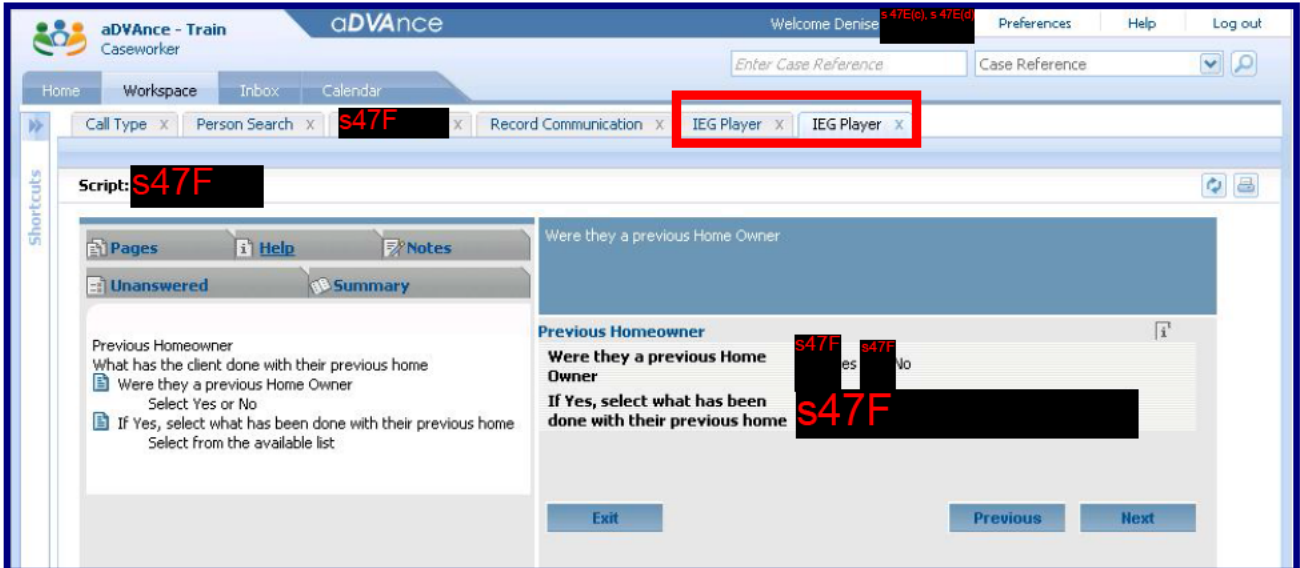
The screenshot shows the 'Add to My Tasks' dialog box. It has a title bar with 'Add to My Tasks' and a close button. Below the title bar is a red asterisk and the text '* required field'. The 'Comment' field is highlighted in orange. Below the comment field is a large text area. At the bottom, there are three buttons: 'Save & View', 'Save', and 'Cancel'. The 'Save & View' button is highlighted in orange.

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.