111.02580 - Creating and completing a Direct Contact on Front of House (FoH)

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111.02580 Creating and completing a Direct Contact on Front of House (FoH) - Overview

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This procedure explains how to create and complete a Direct Contact using the Front of House (FoH) function within Customer First.

Direct Contact refers to a Customer Service Officer (CSO) interacting with a customer, without the customer having first seen a Customer Liaison Officer (CLO). If this occurs, the CSO will need to create a contact in Customer First using a desktop PC, bypassing the Virtual Wait Room (VWR).

Direct Contacts should only be used where a service centre does not have a full time CLO (usually in small and medium sites).

The direct contact function is only to be used in small service centres where there are:

- no customers in the VWR, and
- no customers waiting to be streamed for longer than two minutes.

Extra contains a link to information on Medicare cards.

Other related links

Front of House (FoH)

Accessing and navigating Customer First

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Procedure last issued 2014/02/03, see Procedural Updates and Current Daily Updates for details of major e-Reference updates.

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111.02581 Creating and completing a Direct Contact on Front of House (FoH) - Workflow

Open Customer First and *Create Contact within the Waitroom*.

Enter the customer's:

- Customer Reference Number (CRN) in the **Centrelink/Medicare ID** field
- *Medicare ID and Individual Reference Number (IRN)*, or

Using the dropdown lists, select the relevant:

- *Queue and Service Category*, and
- *Product Category and Service Product*.

- *Update customer information* within Customer First.
- Once customer information has been updated, change the **Service Product Status** to **Completed**.

Does the customer have another enquiry?	**No**	The contact can be completed by changing the **Walkin** status to
Yes		
Is the CSO able to complete the additional enquiry?	**No**	Re-Assign the walk-in through a *warm hand-off*.
Yes		

- *Update the additional customer enquiry* on the FoH tool.
- Perform *customer updates as required*.

- *Update the additional customer enquiry* on the FoH tool.
- Perform *customer updates as required*.
- Finalise the contact by changing the **Walkin** status to **Interview Completed**.

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111.02582 Creating and completing a Direct Contact on Front of House (FoH) - Detail

Step	Action
1	**Is the Customer Service Officer (CSO) conducting a subsequent enquiry after a warm handover?** • If **yes**, go to Step 5. • If **no**, *Log into Customer First* and: ▪ select the **Waitroom** button in the screen header ▪ open the **Create Contact** twisty ▪ call the next customer
2	**Does the customer have their Customer Reference Number (CRN)?** • If **yes**, enter the CRN in the **Centrelink/Medicare ID** field. Go to Step 4. • If **no**, go to Step 3.
3	**Does the customer have their Medicare ID?** • If **yes**: ▪ Enter the customer's Medicare ID in the **Centrelink/Medicare ID** field. ▪ When a valid Medicare ID is entered, a box appears to the right of the field. Enter the customer's Individual Reference Number (IRN) in this box. Go to Step 4. • If **no**, enter the customer's name and date of
4	**Choose categories** • Select the relevant **Queue** and **Service Category** from the dropdown lists. • Select **Direct Contact**. • The **Change Walkin** menu will display with the default status **Customer Presented**.

	Category from the dropdown lists. • Select **Direct Contact**. • The **Change Walkin** menu will display with the default status **Customer Presented**.
5	**The following steps are for CSOs conducting initial enquiries, as well as CSOs conducting subsequent enquiries after a warm hand-off.** • The **Product Category** and **Service Product** fields will be populated with default information which can be changed by using the dropdown lists. • The **Service Product Status** will be set to **Started** automatically.
6	**Was the customer booked in by their CRN or Medicare ID?** • If **yes**, select **Workspace** to load the customer's record in to Customer First. • If **no**, select the **Search** icon from the screen header and Search for the customer on the system. • Update relevant customer information. Once customer information has been updated: • select the **Waitroom** button in the screen header • select the **Walkin ID** and the **Service Processing** menu will display • change the **Service Product Status** to **Completed**. **Note:** The number of minutes spent on that service product will display in the Service Duration column. **Does the customer have another enquiry?** • If **yes**, go to Step 7. • If **no**, go to Step 10.
7	**Additional customer enquiry** • Select **Insert** on the **Service Processing** assignment block. **Note:** to insert a new line that is a duplicate of another service product, click the selection box of the line to be duplicated and select the **Copy** button. • Select the appropriate **Product Category** and **Service Product**. **Note:** The **Service Product Status** will automatically be set to **Started**. **Is the CSO able to complete the additional enquiry?**

	• If **yes**: ▪ update the **Product Category** and **Service Product** fields as required ▪ the **Service Product Status** will be set to **Started** automatically ▪ go to Step 8. • If **no**, go to Step 9.
8	**Was the customer booked in by their CRN or Medicare ID, or is the customer's record still loaded in Customer First?** • If **yes**, select **Workspace** to load the customer's record in to Customer First. • If **no**, select the **Search** icon from the screen header and Search for the customer on the system. • Update relevant customer information. Once customer information has been updated: • select the **Waitroom** button in the screen header • select the **Walkin ID** and the **Service Processing** menu will display • change the **Service Product Status** to **Completed**. Go to Step 10.
9	**Warm hand-off** If the enquiry is unable to be completed by the same CSO who commenced the walk-in, the walk-in can be re-assigned to another staff member as part of a warm hand-off: • In the **Details** assignment block change the walk-in status by selecting the status dropdown list. • Select **Re-Assign**. Procedure ends here.
10	**Finalise contact** The contact can be completed by changing the **Walkin** status to **Interview Completed**.

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111.02583 Creating and completing a Direct Contact on Front of House (FoH) - Extra
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This page contains a link to Medicare eReference on the Intranet for information on Medicare cards. This link is not available to the public.

Medicare eReference, About Medicare cards

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