



## 111.02070 - Updating service request status

[OVERVIEW](#)[WORKFLOW](#)[DETAIL](#)[POLICY](#)[LEGISLATION](#)[EXTRA](#) [Print this page](#) [Feedback](#)

### 111.02070 Updating service request status - Overview

===

This procedure explains the status reasons for service requests in Customer First and how they can be changed. It also explains how to reallocate a service request back into the pool of available work.

The status reason indicates the progress of a service request within Customer First.

#### Reallocating a service request

A Service Officer is able to 'reallocate' the service request in Customer First if they are not able to finalise the activity due to:

- not having the required competency or proficiency
- incorrect category assigned to service request (i.e. a claim service request may have been assigned a review category)
- privacy conflict

Service request reallocation will not result in any changes to the status of the activity in legacy systems such as Income Security Integrated System (ISIS). This means that Service Officers do not need to update the activity status in the legacy system but will need to manually reallocate the service request in Customer First, recording the reason for reallocation. Once reallocated, the service request will be placed back into the pool of available work.

#### Status reason - Hold

Where the Service Officer determines that the service request cannot be completed and the work needs to be held e.g. awaiting more information. The status will need to be changed to hold and either returned to the pool or kept by the Service Officer in their 'My Open Tasks' in Customer First.

Extra contains links to videos that demonstrate how to allocate work using Customer First and definitions for each status.

===!

Procedure last issued 2014/12/08, see [Procedural Updates](#) and [Current Daily Updates](#) for details of major e-Reference updates.

---

e-Reference is Centrelink's endorsed customer service reference tool and must be complied with by all Centrelink employees.


[more](#)


© Commonwealth of Australia 2015

  
top

## 111.02070 - Updating service request status

- OVERVIEW
- WORKFLOW
- DETAIL
- POLICY
- LEGISLATION
- EXTRA

 Print this page

 Feedback

### 111.02071 Updating service request status - Workflow

Within Customer First access the service request



Is the status to be reallocated?

**Yes**

On the **Service Request Details** screen.



- Select Edit.
- Select Reallocated as status reason.
- Select appropriate reallocation reason:
  - Proficiency Raised
  - Category Adjusted
  - Privacy Conflict
  - For more information see [Detail Step 3](#)
- Scroll to the top of the **Service Request Details** screen and select **Save**, then select Cancel to exit edit

**No**



Is the status reason to be changed to hold?

**Yes**

To hold a service request and:



- **Return it to the Allocation Pool**, see [Detail Step 8](#).
- **Keep it in My Open Tasks** when further action is required from the customer (e.g. they have not provided all required information), see [Detail Step 9](#).
- **Keep it in My Open**

see [Detail Step 2](#).

- **Keep it in My Open Tasks** when further action is required by the Service Officer (e.g. requesting residency details, see [Detail Step 10](#)).

## No



- Select required status reason.
- Scroll to the top of the **Service Request Details** screen and select **Save**, then select **Cancel** to exit edit mode.

---

e-Reference is Centrelink's endorsed customer service reference tool and must be complied with by all Centrelink employees.

[more](#)


© Commonwealth of Australia 2015



top

## 111.02070 - Updating service request status

OVERVIEW	WORKFLOW	DETAIL	POLICY	LEGISLATION	EXTRA
----------	----------	--------	--------	-------------	-------


 Print this page

 Feedback

### 111.02072 Updating service request status - Detail

Step	Action
1	<p>Within Customer First select <b>Work Management</b> from the left hand menu.</p> <p>Access the service request by either:</p> <ul style="list-style-type: none"> <li>• select <b>Ready</b> within the Work Allocation assignment block</li> </ul> <p>Or</p> <ul style="list-style-type: none"> <li>• from <b>My Open Tasks</b> select the Service</li> </ul>
2	<p><b>The Service Request Details screen will display</b></p> <p>If the fields on the <b>Service Request Details</b> screen are not able to be updated, scroll to the top of the screen and select <b>Edit</b>.</p> <p>Select the appropriate status from the Status drop down box. See <i>Extra</i> for information on status reasons. If status is to be changed:</p> <ul style="list-style-type: none"> <li>• to <b>Reallocated</b>, go to Step 3.</li> <li>• to a '<b>Hold status</b>', go to Step 6.</li> </ul>
3	<p><b>Status changed to Reallocated</b></p> <p>A new drop down box, Reallocation Reason, will display.</p> <p>Select the appropriate reason from the drop down box:</p> <ul style="list-style-type: none"> <li>• <b>Proficiency Raised</b> - this option is used where the Service Officer does not have proficiency to complete the service request. Go to Step 4.</li> <li>• <b>Category Adjusted</b> - this option is used where the service request has been assigned to an incorrect category. Go to Step 5.</li> <li>• <b>Privacy Conflict</b> - this option is used where</li> </ul>

	<ul style="list-style-type: none"> <li>• <b>Category Adjusted</b> - this option is used where the service request has been assigned to an incorrect category. <a href="#">Go to Step 5.</a></li> <li>• <b>Privacy Conflict</b> - this option is used where the Service Officer may breach privacy and confidentiality requirements if they action the assigned service request. <b>Note:</b> Update the <a href="#">Inadvertent Access Register</a> where appropriate. <a href="#">Go to Step 11.</a></li> </ul>
4	<p><b>Reallocation reason - Proficiency Raised</b></p> <ul style="list-style-type: none"> <li>• A new drop down box, <b>Proficiency Level</b>, will display.</li> <li>• Select the appropriate proficiency level:             <ul style="list-style-type: none"> <li>▪ Established</li> <li>▪ Experienced</li> </ul> </li> <li>• <a href="#">Go to Step 11.</a></li> </ul>
5	<p><b>Reallocation reason - Category Adjusted</b></p> <ul style="list-style-type: none"> <li>• From the Category 1 drop down box select the appropriate category to assign to the service request.</li> <li>• From the Category 2 drop down box select the appropriate category to assign to the service request.</li> </ul> <p><b>Note:</b> a selection must be made for both Category 1 and Category 2.</p> <ul style="list-style-type: none"> <li>• <a href="#">Go to Step 11.</a></li> </ul>
6	<p><b>Status changed to a 'Hold' status</b></p> <p>On the <b>Service Request Details</b> screen.</p> <ul style="list-style-type: none"> <li>• Scroll to the <b>ISIS Activity</b> assignment block and Workspace.</li> </ul>
7	<p><b>Consider reason for holding the service request and where the service request is to be held by the <u>Service Officer</u> or returned to the pool</b></p> <p>To hold a service request and:</p> <ul style="list-style-type: none"> <li>• Return it to the Allocation Pool, <a href="#">go to Step 8.</a></li> <li>• Keep it in My Open Tasks when further action is required from the customer (e.g. has not provided all required information), <a href="#">go to Step 9.</a></li> <li>• Keep it in My Open Tasks when further action is required by the Service Officer (e.g. requesting residency details), <a href="#">go to Step 10.</a></li> </ul>
8	<p><b>Return to the Allocation Pool</b></p> <ul style="list-style-type: none"> <li>• Put the service request on Hold via the Activity List (<b>AL</b>) screen in Customer First.</li> <li>• Clear out of the customer's record</li> </ul>

	<ul style="list-style-type: none"> <li>• Clear out of the customer's record.</li> <li>• The service request will remain in <b>My Open Tasks</b> until the information has been transferred to Customer First. Within a few minutes the service request will disappear from <b>My Open Tasks</b> and will be returned to the allocation pool.</li> <li>• <b>Note:</b> Do not remove the <b>Employee Responsible</b> from the service request.</li> </ul> <p>Procedure ends here.</p>
<p>9</p>	<p><b>On Hold Customer - Keep in My Open Tasks</b></p> <ul style="list-style-type: none"> <li>• On the Service Request details page</li> <li>• Select <b>Edit</b></li> <li>• Tick the <b>Keep In Inbox</b> checkbox.</li> <li>• Select <b>Save</b>.</li> <li>• Click Cancel to exit out of editing mode.</li> <li>• <b>Note:</b> Do not remove the <b>Employee Responsible</b> from the service request.</li> <li>• Navigate to the customer's record by selecting Workspace from the ISIS assignment block and place the activity on Hold from the <b>AL</b> screen.</li> <li>• Clear out of the customer's record. Navigate back to <b>My Inbox</b> by selecting <b>Work Management</b> from the left hand menu. Within a couple of minutes the service request status will display as <b>On Hold - Customer</b> in the <b>My Open Tasks</b>.</li> <li>• When the service request becomes due, the status will change to a new status of <b>Due</b>.</li> </ul> <p>Procedure ends here.</p>
<p>10</p>	<p><b>On Hold Staff - Keep in My Open Tasks</b></p> <ul style="list-style-type: none"> <li>• Clear out of the customer record in Workspace or in the Centrelink legacy system. <b>Note:</b> do not place the activity on Hold in Workspace or in the Centrelink legacy system.</li> <li>• Navigate to the service request in Customer First by selecting <b>Work Management</b> from the left hand menu.</li> <li>• Select <b>Edit</b>.</li> <li>• Select <b>On Hold - Staff</b> from the drop down options.</li> <li>• Select the  <u>Open Input Help icon</u> to the right of the <b>On-Hold Till:</b> field.</li> <li>• Select the required date to hold the service request.</li> <li>• <b>Note:</b> Do not remove the <b>Employee Responsible</b> from the service request.</li> <li>• Select <b>Save</b>.</li> <li>• Click <b>Cancel</b> to exit out of editing mode.</li> <li>• Select <b>Work Management</b> from the left hand menu. The service request status will display as <b>On Hold - Staff</b> and will remain in the <b>Mv</b></li> </ul>

	<p><b>Open Tasks.</b></p> <ul style="list-style-type: none"><li>• When the service request becomes due, the status will change to <b>In Progress</b>.</li></ul> <p>Procedure ends here.</p>
11	<p><b>Status has been changed</b></p> <p>Scroll to the top of the <b>Service Request Details</b> screen and select <b>Save</b>.</p> <p>Click <b>Cancel</b> to exit out of editing mode.</p> <p><b>Note:</b> Changing the service request status in Customer First does not change the status of the activity in the legacy system.</p>

---

e-Reference is Centrelink's endorsed customer service reference tool and must be complied with by all Centrelink employees.

[more](#)

© Commonwealth of Australia 2015

 [top](#)



## 111.02070 - Updating service request status

- OVERVIEW
- WORKFLOW
- DETAIL
- POLICY
- LEGISLATION
- EXTRA

 Print this page

 Feedback

### 111.02073 Updating service request status - Extra

===

This page contains links to videos that demonstrate how to allocate work using Customer First and definitions for each status reason applicable to service requests.

#### Video demonstrations



[Work Allocation - Video demonstrations and transcripts](#)

#### Status reason definitions

For an explanation of service request status, click on the status reason below:

- [!\[\]\(569ff5d1aa9137b5defb690d1175fea6\_img.jpg\) New](#)
- [!\[\]\(59bff645cb030955f45f21c74e7ddbd4\_img.jpg\) In Progress](#)
- [!\[\]\(dd83808d77658902b474c9e02c5f52d1\_img.jpg\) On Hold - Customer](#)
- [!\[\]\(987f007ec31dbf160273204c7c2fd496\_img.jpg\) On Hold - Staff](#)
- [!\[\]\(81fa0003d5fda42e000d07b0ffc66c38\_img.jpg\) Reallocated](#)
- [!\[\]\(acb0c5b34290f09b11b0b02089058fd1\_img.jpg\) Submitted for Checking](#)
- [!\[\]\(da067d0b8b28511b5f66ebd0ba733c97\_img.jpg\) Completed](#)

Category	Description
<b>New</b> <i>Cancelled</i>	The service request has been created, but not allocated to a Service Officer.  This status is recorded automatically.
<b>In Progress</b>	The Service Officer is working on the service request.
<b>On Hold - Customer</b>	The service request has been placed on hold, awaiting further information/contact from the customer or a third party.

<b>On Hold - Customer</b>	<p>The service request has been placed on hold, awaiting further information/contact from the customer or a third party.</p> <p>Service Officers have the option to:</p> <ul style="list-style-type: none"> <li>• return the service request to the pool of available work, or</li> <li>• keep the service request in their 'My Open Tasks' list.</li> </ul> <p>The due date on the service request is determined by the hold date in the Centrelink legacy system.</p> <p>If the service request is returned to the pool it will stay there until the set due date when it will be allocated.</p> <p>This status is automatic.</p>
<b>On Hold - Staff</b>	<p>The service request has been placed on hold as required by the Service Officer and will remain in their 'My Open Tasks' list.</p> <p>The Service Officer needs to set a due date on the service request to advise when they will be able to return to the service request.</p> <p>This status is recorded manually.</p>
<b>Reallocated</b>	<p>The service request has been reallocated to the pool.</p> <p>When the service request is reallocated the Service Officer must select the reason for the reallocation. The service request will then be reassigned to another Service Officer.</p> <p>This status is recorded manually by either the Service Officer or Work Force Manager.</p>
<b>Submitted for Checking</b>	<p>The service request has been actioned, the activity needs to be checked.</p>
<b>Completed</b>	<p>The service request has been actioned.</p>
<b>Cancelled</b>	<p>The service request is no longer required.</p>

===!

---

e-Reference is Centrelink's endorsed customer service reference tool and must be complied with by all Centrelink employees.

[more](#)

© Commonwealth of Australia 2015



top