


111.02540 - Booking a walk-in using Front of House (FoH)

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111.02540 Booking a walk-in using Front of House (FoH) - Overview

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This procedure explains how to book a walk-in using the Front of House (FoH) function within Customer First. This task can be completed using an iPad or desktop PC.

Walk-ins are part of effective management of customer enquiries at front of house. The Customer Liaison Officer (CLO) streams customers for all business into the wait room.

The CLO determines if the customer should be identified as Priority Walk-in or an Express Walk-in.

 [Extra](#) contains a link to information on Medicare cards.

Other related links

 [Editing a walk-in using Front of House \(FoH\)](#)

 [Completing a walk-in using Front of House \(FoH\)](#)

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111.02541 Booking a walk-in using Front of House (FoH) - Workflow

Create a new contact.

- For iPad users, see [Detail Step 2](#).
- For Desktop PC users, see [Detail Step 7](#).



Is the customer's Customer Reference Number (CRN) or Medicare ID known?

Yes



Enter the number in the **Centrelink/Medicare ID** field. For Medicare ID also enter the Individual Reference Number (IRN) in the box that appears after entering the Medicare ID.

No



Enter the customer's name and Date of Birth (DOB) in the format DDMMYY or DDMMYYYY to identify the customer.



If using an iPad establish Proof of Record Ownership (PORO) based on information displayed. This is not required for Desktop PC users.



Record the Queue type and Service Category.



Select the **Book into Waitroom** button.

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111.02542 Booking a walk-in using Front of House (FoH) - Detail

Step	Action
1	<p>Is a <u>walk-in</u> to be booked on an iPad or a desktop PC?</p> <ul style="list-style-type: none"> • If on an iPad, <u>go to Step 2</u>.
2	<p>iPad: Create a new contact</p> <p>Tap on the New Contact icon located on the top right of the screen.</p> <p>The Walk-in screen appears.</p> <p>The keyboard only displays letters that a CRN can end with. This assists with entering a valid CRN or Medicare ID.</p> <p>To display a standard keyboard with all letters</p>
3	<p>Is the customer's <u>Customer Reference Number (CRN)</u> or Medicare ID known?</p> <ul style="list-style-type: none"> • If yes, enter the customer's CRN or Medicare ID in the Centrelink/Medicare ID field. <ul style="list-style-type: none"> ▪ When nine valid numbers of a CRN are entered, the appropriate letter for that CRN is highlighted on the keyboard. Tap this letter to confirm the CRN. The Customer Details screen is displayed. <u>Go to Step 4</u>. ▪ If a valid Medicare ID is entered, a box appears to the right of the field. Enter the Individual Reference Number (IRN) in this field. For more information on Medicare cards see <u>Extra</u>. <u>Go to Step 5</u>. • If no, enter the customer's name and Date of
4	<p>iPad: Establish Proof of Record Ownership (PORO) after CRN is entered</p>

	<p>DDMMYYYY to identify the customer. Go to Step 6.</p>
<p>4</p>	<p><u>iPad: Establish Proof of Record Ownership (PORO) after CRN is entered</u></p> <p>Touch one of the following icons on the Customer Details screen to go to the selected section to establish PORO:</p> <ul style="list-style-type: none"> • Restricted Servicing Arrangements (RSA) • Customer Incidents (CINS) • Participation (PST) • Vulnerability (VULN) • Display on Access DOCs (DOA) <p>Note: If no data exists for an icon, the icon will be greyed out.</p> <p>To return to the Walkin screen: Tap the Walkin tab located on the top-left corner of the Customer Details screen.</p> <p>Go to Step 6.</p>
<p>5</p>	<p><u>iPad: Establish Proof of Record Ownership (PORO) after Medicare ID is entered</u></p> <p>Basic details for the customer from their Medicare ID are displayed.</p> <p>Confirm PORO using these details.</p>
<p>6</p>	<p>iPad: Queue and Service Category details</p> <p>Tap the desired Queue and Service Category.</p> <p>Note: If booking in the customer by CRN or Medicare ID, to access the Customer Details screen again tap their name.</p> <p>Options on the left side of the screen:</p> <ul style="list-style-type: none"> • Priority: to add or remove a Priority indicator for the customer, tap the Priority icon. • Express: to add or remove an Express queue indicator for the customer, tap the Express icon. • Notes: If adding information in the Notes field tap the Notes button. <p>Tap the Book into Waitroom button located on the top right corner of the screen.</p> <p>Procedure ends here.</p>
<p>7</p>	<p>Desktop: Create contact</p> <p> Log into Customer First.</p> <p>Select the Waitroom button in the screen header.</p>

	<p>Click the twisty for Create Contact to open the Create Contact Assignment Block.</p> <p>Click 'Create Contact'.</p>
8	<p>Desktop: Search for customer's record</p> <p>Is the customer's CRN or Medicare ID known?</p> <ul style="list-style-type: none"> • If yes, enter the customer's CRN or Medicare ID in the Centrelink/Medicare ID field. <ul style="list-style-type: none"> ▪ If a CRN is entered, <u>go to Step 9</u>. ▪ If a valid Medicare ID is entered, a box appears to the right of the field. Enter the Individual Reference Number (IRN) in this field. For more information on Medicare cards see <i>Extra</i>. <u>Go to Step 9</u>. • If no, enter the customer's name and Date of Birth (DOB) in the format DDMMYY or DDMMYYYY in the Customer Name field. <u>Go to Step 9</u>.
9	<p>Desktop: Queue and Service Category details</p> <p>Select the relevant option from the list in the Queue: and Service Category: dropdown boxes.</p> <ul style="list-style-type: none"> • If appropriate, tick the Priority check box. • If the customer's enquiry can be completed within five minutes, tick the Express checkbox. • Additional information can be written in the Notes: field. <p>Click the Book Into Waitroom button.</p>

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111.02543 Booking a walk-in using Front of House (FoH) - Extra

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This page contains a link to Medicare eReference on CentreNet for information on Medicare cards. This link is not available to the public.

 [Medicare eReference, About Medicare cards](#)

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