

111.02040 - Accessing and completing service requests through Customer First

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111.02040 Accessing and completing service requests through Customer First - Overview

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This procedure provides information on how to access service requests that have been allocated to staff through Customer First.

To be allocated a service request in Customer First, select the Ready button from the Work Management Menu. Service Requests that have previously been allocated and are not yet complete can also be accessed by selecting the service request from the My Open Tasks option.

When the service request has been selected, Customer Service Officers (CSOs) will need to complete any updates/actions in Customer First. Once the CSO has completed any actions/updates they may need to update the status of the service request.

When the service request is completed, the status should be automatically updated in Customer First. If unable to complete the service request then the CSO will need to either:

- Reassign the service request to another (specific) staff member
- Change the service request status to:
 - On hold - either returning it to the pool or retaining it in their my open tasks, or
 - Reallocated - return the work to the pool.

Other related links

[Reassigning Service Requests](#)

[Updating Service Request status](#)

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Procedure last issued 2014/06/16, 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.



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111.02041 Accessing and completing service requests through Customer First - Workflow

Within Customer First select **Work Management** from the left hand menu.



Access a new service request?

No

To access uncompleted tasks:

- Select **My Open Tasks**
- Select the service



Yes



Select **Ready** within the Work Allocation



The **Service Request Details** screen will display.



Does the service request need to be reassigned to another staff member or reallocated back to the pool or status changed?

Yes

- For reassigning the service request see [Reassigning service requests](#).
- For reallocating the service request or changing the status of the service request see



No



Scroll down to the **Income Security Integrated System (ISIS) Activity** assignment block and select **Workspace**. For more information see [Detail Step 4](#).



Can the service request be completed?

No

[Change the service request to on hold status](#) and either return it to the pool



more information see [Detail Step 4](#).



Can the service request be completed?

No [Change the service request to on hold status](#) and either return it to the pool or retain it in **My Open Tasks**.



Yes



Once the activity is completed the status of the service request will automatically be updated in Customer First.

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111.02042 Accessing and completing service requests through Customer First - Detail

Step	Action
1	<p>Access Customer First</p> <p>Select Work Management from the left hand menu.</p> <p>To access:</p> <ul style="list-style-type: none"> • a new service request, <u>go to Step 2.</u>
2	<p>Access a new service request</p> <ul style="list-style-type: none"> • Select Ready within the Work Allocation assignment block. Note: The default setting is Not Ready. • The Service Request Details screen will display.
3	<p>Previously allocated service request</p> <p>Previously allocated service requests that have not been completed are listed in My Open Tasks</p> <ul style="list-style-type: none"> • Select the Service Request ID link of the required service request • The Service Request Details screen will display.
4	<p>The Service Request Details screen</p> <p>Scroll down to the ISIS Activity assignment block and select Workspace.</p> <p>Can the service request be completed?</p> <ul style="list-style-type: none"> • If yes, <u>go to Step 6.</u> • If no, <u>go to Step 7.</u>
6	<p>Completing the activity will automatically update the status of the service request in Customer First and remove it from My Open Tasks.</p>
	<p>Procedure ends here</p>

	<ul style="list-style-type: none"> • If no, go to Step 7.
6	<p>Completing the activity will automatically update the status of the service request in Customer First and remove it from My Open Tasks.</p> <p>Procedure ends here.</p>
7	<ul style="list-style-type: none"> • For reassigning the service request to another specific staff member, see <u><i>Reassigning Service Requests</i></u>. • For reallocating the service request back to the available work pool, see <u><i>Updating Service Request status</i></u>. • To place the service request on hold and either retain it in My Open Tasks or return to the pool, see <u><i>Updating Service Request status</i></u>.

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