


111.02050 - Reassigning service requests

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


111.02050 Reassigning service requests - Overview

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Where a service request has been allocated to a Customer Service Officer (CSO), both the CSO and the Work Force Manager are able to reassign the service request to another CSO.

Reassigning a service request can be required as per business guidelines.

When a service request is reassigned it is not returned to the available work pool, as is the case when a service request is reallocated. It will appear in the gaining CSO's 'My Open Tasks' option.

 [Extra](#) contains links to videos that demonstrate how to allocate work using Customer First.

Other related links

 [Updating service request status](#)

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Procedure last issued 2014/08/04, 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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111.02050 - Reassigning service requests

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

-  Print this page
-  feedback

111.02051 Reassigning service requests -

Workflow

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



Customer Service Officers (CSOs)

- Select the **Service Request ID** for the service request that needs to be reassigned. See [Detail Step 2](#)

 Work Force Managers


- Use the **Employee Responsible ID** search criteria to search for the CSO whose service request needs to be reassigned. See [Detail Step 3](#).
- Locate and select the service request that needs to be



Is the User ID of the CSO the service request is be reassigned to known?

No



- Select the  [Open Input Help icon](#) to the right of the **Employee Responsible ID** search criteria.
- Enter Last Name or First Name of the CSO who is to be assigned the service request.
Note: the preferred method to search is by User ID.
- Select **Search**.

The list of all CSOs matching the search criteria is displayed. Select the box to the right

Yes



- In the **Employee Responsible ID** field delete the name of the currently assigned CSO and type the User ID of the

Yes



- In the **Employee Responsible ID** field delete the name of the currently assigned CSO and type the User ID of the CSO who is to be assigned the service request.
- Press **Enter** on the keyboard. The name of the CSO will display in the **Employee Responsible ID** field.
- Scroll to the top of the **Service Request Details** screen and select **Save** then select **Cancel** to exit edit mode..

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111.02050 - Reassigning service requests




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


-  Print this page
-  Feedback

111.02052 Reassigning service requests -

Detail
Step

Action

Step	Action
1	<p>Within Customer First</p> <p>Select Work Management from the left hand menu.</p> <ul style="list-style-type: none"> • Work Force Managers, <u>go to Step 3.</u>
2	<p>Customer Service Officers (CSOs)</p> <ul style="list-style-type: none"> • Navigate to My Open Tasks. • Select the Service Request ID for the service request that needs to be reassigned. • The Service Request Details screen will display.
3	<p> Work Force Managers</p> <ul style="list-style-type: none"> • Select Search Service Request. • The Search Criteria fields will display. • Select the relevant service request status (i.e. 'In Progress') from the Status search criteria. • Select the  <u>Open Input Help icon</u> to the right of the Employee Responsible ID search criteria. • Enter the User ID, Last Name or First Name of the CSO whose Service Request needs to be reassigned. • Note: the preferred method to search is by <u>User ID.</u>
4	<p> The list of all CSOs matching the search criteria is displayed.</p> <ul style="list-style-type: none"> • Select the box to the right of the appropriate CSO. The CSO details will then display in the search. • Select Search. • All service requests assigned to the selected CSO will display. • Select the required Service Request ID. • The Service Request Details screen will

	<ul style="list-style-type: none"> • All service requests assigned to the selected CSO will display. • Select the required Service Request ID. • The Service Request Details screen will display. • Scroll to the top of the Service Request Details screen and select Edit.
5	<p>Is the User ID of the CSO the service request is be reassigned to known?</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>User ID known</p> <ul style="list-style-type: none"> • In the Employee Responsible ID field delete the name of the currently assigned CSO and type the User ID of the CSO who is to be assigned the service request. • Press Enter on the keyboard. • <u>Go to Step 8</u>.
7	<p>User ID unknown</p> <ul style="list-style-type: none"> • Select the  <u>Open Input Help icon</u> to the right of the Employee Responsible ID search criteria. • Enter Last Name or First Name of the CSO who is to be assigned the service request. Note: the preferred method to search is by User ID. • Select Search. <p>The list of all CSOs matching the search criteria is displayed.</p> <ul style="list-style-type: none"> • Select the box to the right of the appropriate CSO.
8	<p>The name of the CSO will display in the Employee Responsible ID field.</p> <p>Scroll to the top of the Service Request Details screen and select Save then Cancel to exit edit mode.</p>

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111.02050 - Reassigning service requests

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

 [Print this page](#)


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 [Feedback](#)

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This page contains links to videos that demonstrate how to allocate work using Customer First.

Video demonstrations

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

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