111.02560 - Completing a walk-in using Front of House (FoH)

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111.02560 Completing a walk-in using Front of House (FoH) - Overview

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This procedure explains how to select and complete a walk-in on a Front of House (FoH) desktop. This will indicate that the contact has been completed.

When a Customer Service Officer (CSO) is assigned to action the walk-in, they are required to update the FoH tool to ensure the customer is managed efficiently and a quality service is provided.

The actions required in the FoH tool for a walk-in include:

- updating the status to indicate the customer presented or abandoned the contact
- inserting another service product if another piece of work needs to be completed
- reassigning the walk-in to another CSO with the appropriate skill set to action the customer's enquiry
- updating the customer's information and then the status to indicate the walk-in is completed.

ther related links

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

Editing a walk-in using Front of House (FoH)

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Procedure last issued 2013/08/05, see Procedural Updates and Current Daily Updates for details of major e-Reference updates.

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111.02561 Completing a walk-in using Front of House (FoH) - Workflow

Select the **Waitroom** button in the screen header.

Does the site use a ticket machine? **Yes** Select the *Counter Number*.

No

Open the **Waitroom** assignment block and then the relevant **Walkin ID** to display the **Change Walkin** assignment block.

Open the **Status** dropdown list and change it from **Waiting** to

Is the customer present? **No** Open the **Status** dropdown list and select **Abandoned**.

Yes

Open the **Status** dropdown list and select **Customer**

- Change **Product Category:** and **Service Product:** fields if required and then update relevant customer information within Customer First.
- Select the **Waitroom** button in the screen header, then

Does another piece of work need to be completed for the customer? **No** *The contact can be completed*

Yes

customer?

Yes

- On the **Service Processing** assignment block select **Insert**.
- *Add a new line* if required to duplicate another Service Product.
- Select the appropriate **Product Category** and **Service Product**.

Is the additional work able to be completed?	**No**	*Re-assign the walk-in to another staff member*.

Yes

- *Update customer information* within Customer First.
- *Complete the contact*.

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111.02562 Completing a walk-in using Front of House (FoH) - Detail

Step	Action
1	**Access Waitroom before serving a customer** Select the **Waitroom** button in the screen header. Does the site use a ticket machine? • If **yes**, go to Step 2. • If **no**, go to Step 3.
2	**Ticket machine sites: Counter Number** Select the **Counter Number** located on the top left hand corner of the page by clicking the dropdown list and choosing the relevant number.
3	Open the **Waitroom** assignment block by selecting the twisty arrow. Select the relevant **Walkin ID** from the available list.
4	**Change Walkin** assignment block Open the **Status** dropdown list and change it from **Waiting** to **Assigned**. Does the site use a ticket machine? • If **yes**, go to Step 5. • If **no**, go to Step 6.
5	**Ticket machine sites: Ticket call** The call board is triggered to direct the relevant ticket number to the appropriate counter. If required, the ticket can be called again by opening the **Status** dropdown list and re-selecting
6	**Is the customer present?**

	opening the **Status** dropdown list and re-selecting **Assigned**.
6	**Is the customer present?** • If **yes**, open the **Status** dropdown list and select **Customer Presented**. Go to Step 7. • If **no**, open the **Status** dropdown list and select **Abandoned**. Procedure ends here.
7	**Update fields if required** The **Product Category:** and **Service Product:** fields will be populated with default information. If required, change these by clicking on the dropdown lists and selecting the appropriate items. The **Service Product Status** will be automatically set to **Started**.
8	**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 in the: • Select the **Waitroom** button in the screen header. • Select the **Walkin ID**. The Service Processing assignment block will display. Does another piece of work need to be completed for the customer? • If **yes**, go to Step 9. • If **no**, go to Step 14.
9	**Additional customer enquiry** On the **Service Processing** assignment block select **Insert**. **Note:** The status of the previous Service Product will automatically be set to **Completed**. Is a new line that is a duplicate of another Service Product required? • If **yes**, go to Step 10

	• If **no**, go to Step 11
10	**Add duplicate Service Product** To add a new line that is a duplicate of another Service Product: • change the status of the previous Service Product to **Completed** • click the selection box of the line to be duplicated and select the **Copy** button.
11	**Complete additional work if able to** Select the appropriate **Product Category** and **Service Product**. **Note:** The Service Product Status will automatically be set to **Started**. Is the additional work able to be completed? • If **yes**, go to step 12. • If **no**, go to Step 13.
12	**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 14.
13	**Warm hand-off** If unable to complete the walk-in, it 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.
14	**Finalise contact**

14	**Finalise contact** The contact can be completed by changing the walk-in status to **Interview Completed**. Any started Service Products will automatically be set to **Completed**, and the walk-in will be finalised.

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