111.20110 - Booking appointments in the DHS Appointment System

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111.20110 Booking appointments in the DHS Appointment System - Overview

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This procedure explains how to book appointments in the DHS Appointment System using the Customer First guided procedure.

A separate procedure explains how to *cancel or reschedule a customer appointment*.

There are *specific protocols for booking appointments* for Education, Employment and Disability (EED), Families and Child Care (FCC), and Seniors, Carers and Rural (SCR) customers.

A person does not need to be a customer in receipt of payments or services to make an appointment, however in order to book an appointment they must have a customer record. If the customer prefers a home visit, it is to be organised by the Service Officer conducting the appointment. These appointments need to be identified and planned well before the appointment date to permit travelling time.

Reminders or advices about appointments

Customers can view and manage their appointments on the Human Services Website through the Centrelink *online accounts page*.

Note: Customer online reschedule capability has not yet been enabled.

Contact in relation to a claim

If a customer is contacting in relation to an intention to claim an income support payment, ensure all of the customer's contact details are current and record the customer's *intention to claim*.

Extra contains a table of appointment types, service reasons, and the related actions available to both staff and customers, as well as links to videos that demonstrate how to use the DHS Appointment system and various features of Customer First. It also contains a link to the Network News Update (NNU) DHS Appointment system - time display issue for all states and territories (8551).

Other related links

View, reschedule or cancel an appointment in the DHS Appointment System

Complete and finalise appointments in the DHS Appointment System

Protocols for customer requested appointments

Booking an interpreter for an appointment (including Indigenous and Auslan/Sign interpreters)

Updating address details

Multilingual Call

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Procedure last issued 2014/11/17, see Procedural Updates and Current Daily Updates for details of major e-Reference updates.

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111.20111 Booking appointments in the DHS Appointment System - Access

Summary

Access staff will book appointments for customers who

What to do: Specific protocols

If the request for an appointment relates to the Education, Employment and Disability (EED), Families and Child Care (FCC), or Seniors, Carers and Rural (SCR) Business Lines, see

What to do: Check for

Does the person have an existing record? *More detail*.

No

What to do: Create

Convert a child (**CHI**) record into an adult (**PER**) record, or add person to

Yes

What to do: Create appointment

- Access the Navigation Toolbar in Customer First.
- Select **Appointments**.
- Select **Book and Manage Appointments**.
- Select option to create, reschedule, or cancel an appointment. *More detail*.

What to do: Appointment Details

- Select most relevant appointment from the **Appointment Type** dropdown list. *More detail*.
- Select the customer's preferred date and location at the time of the appointment.
- Search time slots to show the available time slots on that date and select the customer's preferred appointment time from the list.

date and select the customer's preferred appointment time from the list.

- Select 'Next' once the required data has been entered. *More detail*.

What to do: Confirm appointment

- The Confirm screen will display all details selected through the workflow.
- Click the **Finish** button to complete the booking. *More detail*.
- If any information needs to be changed, go to the correct page using the 'Previous' and 'Next' buttons below the appointment guided procedure diagram.

Hand-off

If unable to select a suitable appointment reason, create a callback **DOC** via Callback/Action Doc macro Callback/Actdoc Guided Procedure for the service centre to make a suitable time.
Staff should check Mapstat to ensure they are choosing the correct appointment.

No further Access processing required. Proceed to 'Customer information/obligations' below.

Customer information/obligations

Advise the customer:

- the time, date and location of their appointment
- about any documents they may need to bring, and
- that they need to call if they are unable make their appointment.

Customer resources

Customers can view and reschedule appointments using Centrelink Online Services.

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111.20112 Booking appointments in the DHS Appointment System - Detail

Step	Action
1	To make an appointment for: • a **new customer**, go to step 2 • an **existing customer**, go to step 4
2	Check if the person has an existing record of payments or services by *searching for a customer on the system*. **Has a record been found for the person?** • If **yes**, go to Step 4

3	Repeat the search, but change Search type to 'Child'.
	
	Has a child record been located for the person?
	
	• If **yes**, *convert the child (**CHI**) record into a person (**PER**) record*. Go to step 4.
	• If **no**;
	  ▪ *Add the customer to the system*.
	  ▪ Check there are no outstanding activities on the Activity List (**AL**) screen.
	  ▪ Run the daily driver by typing '**DDR**' in the

4	**Access Customer First** • *Log into Customer First*, which will then default to the search screen. • Enter the customer's Customer Reference Number (CRN) and select **Search Customer**. • Select the customer from the list. • Select the white arrow in the blue tab which will bring up the **Navigation** tool bar.
5	**The Navigation toolbar**

	• Select the white arrow in the blue tab which will bring up the **Navigation** tool bar.
5	**The Navigation toolbar** • Select **Appointments**. This will open up a sub menu. • Select **Book and Manage Appointments**
6	**Creating an appointment** The **Appointments** screen will be displayed. Any existing appointments will appear under **Booked Appointments**. There are options to create, reschedule, or cancel an existing appointment. Select **Create** to go to the **Appointment Detail** screen.
7	**Appointment Details screen** The customer's full name and CRN will be pre-filled. • Select most relevant appointment from the **Appointment Type** dropdown list. • **Appointment Channel** will pre-populate. This can be changed where business rules allow. • Select **Service Reason** appropriate to the customer's payment type. • **Note: Specialist Service Reasons** should only be utilised by specialist staff. • Specify whether the customer will require an interpreter. • If the **Appointment Channel** is phone, select the customer's preferred phone number by selecting the icon next to this field. This will display all phone numbers currently on the customer's record. • **What to Bring** will automatically populate based on the appointment type. Documents can be added and deleted from this as necessary. Once the required data has been entered, select **Next**.
8	**Appointment Booking screen** • Select the customer's preferred date. • Select the office location. This will automatically populate available appointment times. • Where no appointment is available at the location on the chosen day, staff should use the '**Find**' button. This will search for the next available appointment in weekly increments. • Select the customer's preferred appointment time from the list. • Select **Next** once the required data has been

	• Select **Next** once the required data has been entered.
9	**Confirm the customers appointment** The **Confirm** screen will display all of the customer's appointment details. Click the **Finish** button to complete the booking. If any information needs to be changed, go to the correct page using the **Previous** and **Next** buttons below the appointment workflow diagram. For phone appointment types, advise the customer: **Service Officer:** "A staff member will be calling from a private number on <date> between <appointment time frame>."

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111.20113 Booking appointments in the DHS Appointment System - Extra
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This page contains a table of appointment types, and the related actions available to customers, and links to videos that demonstrate how to use the DHS Appointment system and various features of Customer First. It also contains a link to the Network News Update (NNU) DHS Appointment system - time display issue for all states and territories (8551). These links are not available to the public.

Note: The table in the attachment is to be used as a guide only. Staff should be utilising available tools such as Mapstat and the relevant eReference procedure for appropriate business processes.

Appointment types and related actions

Only specialist staff should use the specialist **Service Reasons**. If staff want to book a specialist appointment please refer to the appropriate eReference procedure and select the appropriate **Appointment Type**.

Certain appointment types have different actions available for staff and customers. Staff actions are completed through Customer First using the DHS Appointment System. Customer actions are completed through Centrelink *online accounts*.

Video demonstrations

DHS Appointments - Video demonstrations and transcripts

Customer First March Top Ten - Video demonstrations and transcripts

NNU

DHS Appointment system - time display issue for all states and territories

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