

111.20130 - Complete and finalise appointments in the DHS Appointment System


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111.20130 Complete and finalise appointments in the DHS Appointment System - Overview


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This procedure outlines how to complete and finalise an appointment in the DHS Appointment System using the DHS Appointment System guided procedure.


Once a customer has attended an appointment, it should be completed. If the customer has not attended and has not contacted, the appointment record should also be finalised.


 [Extra](#) contains links to videos that demonstrate how to use the DHS Appointment system, and to the Network News Update (NNU) DHS Appointment system - time display issue for all states and territories (8551).

Other related links

 [Booking appointments in the DHS Appointment System](#)

 [Create and manage appointment profiles in the DHS Appointment System](#)

 [View, reschedule or cancel an appointment in the DHS Appointment System](#)

 [Protocols for customer requested appointments](#)

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Procedure last issued 2014/11/17, 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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111.20131 Complete and finalise appointments in the DHS Appointment System - Workflow

Log into Customer First, and

- locate appointment using a Customer Reference Number (CRN), or
- search for appointments



Is the appointment a telephone appointment?

No

Conduct the appointment and change the appointment status to Complete.
Record details on a **DOC**.



Yes



Has contact with the customer been made?

No

Place the appointment on hold and attempt contact later.



Yes



Conduct the appointment and change the appointment status to Complete.
Record details on a **DOC**.

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111.20132 Complete and finalise appointments in the DHS Appointment System - Detail

	<p>Is the Customer Reference Number (CRN) for the appointment available?</p> <ul style="list-style-type: none"> • If yes, go to Step 2. • If no, go to Step 3.
2	<p>Locate appointment using CRN</p> <ul style="list-style-type: none"> • Log into Customer First, which will then default to the search screen. • Click on the Search tab. • Enter the customer's CRN and select Search Customer. • Select the customer from the list. The Customer Details screen will now be displayed. • Click on the Appointments tab to find appointment details. • Click on the Appointment ID link and then: <ul style="list-style-type: none"> ▪ select Edit, ▪ change the status to In process, and ▪ click Save.
3	<p>Search for appointments</p> <ul style="list-style-type: none"> • Log into Customer First, which will then default to the search screen. • Select the white arrow in the blue tab and select the Inbox. • Search the relevant fields as advised by a Team Leader. • Click Search before selecting an appointment to refresh the screen. • Select the next appointment with a status of Open by selecting the Category option. • Select Edit, change the status to In process

	<p>to refresh the screen.</p> <ul style="list-style-type: none"> • Select the next appointment with a status of Open by selecting the Category option. • Select Edit, change the status to In process and click Save. • Click the Finish button to complete the booking.
4	<p>Is the appointment a phone appointment?</p> <ul style="list-style-type: none"> • If yes, <u>go to Step 5</u> • If no, <u>go to Step 6</u>
5	<p>Is the customer able to be contacted by phone?</p> <ul style="list-style-type: none"> • If yes, <u>go to Step 6</u>. • If no; <ul style="list-style-type: none"> ▪ Change the appointment status to On Hold. ▪ Update the notes with the time the customer was contacted. ▪ Select Save and then Back. ▪ At the end of the hour, attempt to call the On Hold customer again. ▪ If the customer still cannot be contacted, change the status to Did not attend. Procedure ends here.
6	<p>Completing/finalising an appointment</p> <p>Conduct the appointment and then:</p> <ul style="list-style-type: none"> • change the appointment status to Complete, • select Save and Back, • complete the relevant processes in Customer First.

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111.20133 Complete and finalise appointments in the DHS Appointment System - Extra

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This page contains links to videos that demonstrate how to use the DHS Appointment system and 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.

 [DHS Appointments - Video demonstrations and transcripts](#)

 [NNU, DHS Appointment system - time display issue for all states and territories](#)

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