111.20140 - Create and manage appointment profiles in the DHS Appointment System

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111.20140 Create and manage appointment profiles in the DHS Appointment System - Overview

This procedure explains how Team Leaders, Managers, and staff with Manager Access create and manage appointment profiles in the DHS Appointment System via Customer First.

It provides instructions on how to:

- add new positions and profiles, including the interpreter profile
- delete times, profiles, and positions
- make changes to existing interview positions (e.g. public holidays)
- monitor appointment profiles.

The DHS Appointment System allows management of appointment profiles within Customer First.

Note: A separate procedure explains the *Front of House (FoH)* function in Customer First which includes queue management for walk-in appointments and the Virtual Wait Room (VWR).

Extra contains a table of appointment types and service reasons available in the DHS Appointment System and a link to the Network News Update (NNU) DHS Appointment system - the display issue for all states and territories (8551).

Other related links

Accessing and navigating Customer First

Front of House (FoH)

Booking appointments in the DHS Appointment System

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

Complete and finalise appointments in the DHS Appointment

Complete and finalise appointments in the DHS Appointment System

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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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Complete and finalise appointments in the DHS Appointment System

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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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111.20141 Create and manage appointment profiles in the DHS Appointment System - Workflow

⭐ This process is for Team Leaders, Managers, and staff with Manager Access only.

To view existing profiles:

- *log into Customer First*,
- navigate to the **My Work** menu,
- select **Appointments**,

⬇

⭐ Does the appointment profile to be managed appear in the list?	**No** ➡	⭐ Select **Manage appointment profile** and desired options for the new appointment profile. *See*
Yes ⬇	☑	
⭐ Is the appointment profile to be deleted?	**Yes** ➡	⭐ From the **Manage Appointment Profile** option: • select **Maintain** option • select **Delete**
No ⬇		

⭐ Navigate to the **Manage Appointment Profile** screen in Customer First.
Select the appropriate options from the dropdown lists. *See*

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111.20142 Create and manage appointment profiles in the DHS Appointment System - Detail

This process is for Team Leaders, Managers, and staff with Manager Access only.

1	✪ **Access Customer First**
	ⓔ *Log into Customer First*, which will then default to the search screen.
	To access appointment profiles select the **My Work** tab at the top.
2	✪ **The My Work menu**
	The menu is now available by clicking the white arrow in the blue tab in the top left:
	• Select **Appointments**.
	• Select **Manage Appointment Profile**.
	Note: Only staff with relevant access can manage appointment profiles. The procedure *Accessing and navigating Customer First* contains a task card which details how to obtain this access.
3	✪ **Manage Appointment Profile screen**
	Retract the menu by clicking on the left facing arrow in the top right of the menu. To:
	• **create** a new profile, go to Step 4.
	• **manage** an existing profile, go to Step 5.
	• **view** an existing profile, go to Step 6.
	• **delete** a profile, go to Step 7.
4	✪ **Create a new appointment profile**
	Select the appropriate options from each of the following dropdown lists:
	• **Appointment Type**

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- **Appointment Type**

  - select the relevant appointment type,
  - this list will expand as more appointments are added to Customer First.

- **Team**

  - appointment profile for team name/office location

- **Maintain Option**

  - Profiles may be set up for a single date, or for a date range.

- **Date**

  - A small calendar window will open,
  - Choose a date for the profile, the date will display in DD.MM.YYYY format.

- **Start Time**

  - Select desired start time

- **End Time**

  - Select desired end time

- **Capacity**

  - Leave the capacity at zero (to be managed later).
  - Click on '**Create**'.

An appointment profile has now been created for the team/office.

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✪ **Manage (edit) an existing profile**

Navigate to the **Manage Appointment Profile** screen with in Customer First.

Select the appropriate options from each of the following dropdown lists:

- **Appointment Type**

  - select most relevant appointment type

- **Team**

  - appointment profile for team name/office

- **Maintain Option**

  - change timeslot capacity

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- **Date**

  - a small calendar window will open,
  - choose a date for the profile, the date will display in DD.MM.YYYY format.

- Select **Display Entries** to open an appointment profile:

  - The profile will display in blocks of appointment related time periods, with timeslots listed in the left hand column.
  - The capacity column on the right hand side displays how many appointments are available for each timeslot.
  - Navigate using the back and forward buttons, or by selecting the page number listed in blue.

- To update a profile;

  - click into the capacity column and overtype the numbers,
  - click on **Create** to update the profile.

Once all edits have been completed a list of the appointment profile can be viewed from the **View Profile Capacity** screen.

Procedure ends here.

| 6 | ✪ **View existing Appointment Profile** |

From the **navigation** toolbar select **Appointments** then **View Appointment Profile Capacity** and complete the following fields:

- **Date**

  - a small calendar window will open,
  - choose a date for the profile, the date will display in DD.MM.YYYY format.

- **Appointment Type**

  - select most relevant appointment type,

- **Team**

  - appointment profile for team name

Capacity details will display in the '**Results**' table:

- **Location:** reflects where the appointment is located and relates to the **Team** option selected in the search field above
- **Your Time:** displays time of user
- **Time at Team Location:** displays the time of

		the appointment at the team/office responsible for actioning the appointment • **Available Slot:** displays the number of appointments remaining available for that timeslot • **Total Capacity:** displays the total number of appointments allotted to that timeslot
	7	✪ **Delete a profile:** • Navigate to **Manage Appointment Profile**. • Select the **Maintain** option. • Select **Delete appointment profile**. • Select the time to delete and click on the rubbish bin icon to the left. • A message box will open to confirm deletion, select **Yes** to confirm deletion.

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111.20143 Create and manage appointment profiles in the DHS Appointment System - Extra
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This page contains a table of appointment types and service reasons available in the DHS Appointment System and a link to the Network News Update (NNU) DHS Appointment system - time display issue for all states and territories (8551). The link to the NNU is not available to the public.

🌐
NNU

DHS Appointment system - time display issue for all states and territories
DHS Appointment Literal Review Enquiry
Table of Appointment Profiles available in Customer First
Short Claim
Medium Claim
Long Claim
Post Approved Activity Review Appointment
Post Exemption Review Appointment
Briefing Large Family Exemption Appointment
Post Approved Activity Review Appointment (re-
Mature Age Voluntary Work Review Appointment
Student to Job seeker Transfer Participation
Parenting Payment Briefing Appointment
Compulsory Participation Interview
Compulsory Quarterly Participation Interview
Compulsory Quarterly Participation Interview (re-
Connections Initial Interview
Connections Subsequent Interview
Financial Information Service Interview
Compensation Preclusion Interview

engagement)
Connections Initial Interview
Connections Subsequent Interview
Financial Information Service Interview
Compensation Preclusion Interview
Unreasonable to Live at Home
SWOk General
SWO Callback
Housing Authority Income Management Referral
Comprehensive Compliance Assessment
Comprehensive Compliance Assessment reconnection
Random Sample Interview Short
Random Sample Interview Medium
Random Sample Interview Long
Income Management Initial Interview
Income Management Review Interview
Income Management Exit Interview
Jf1 SJF Interview
Jf2 SJF Interview
Jf3 SJF Interview
Jf4 SJF Interview
Jf5 SJF Interview
Jf6 SJF Interview
SJF Workshop (4 yrs - no prevoc barriers)
SJF Workshop (4 yrs -prevoc barriers)
SJF Workshop (5 yrs - no prevoc barriers)
SJF Workshop (5 yrs - prevoc barriers
SJF Follow up to workshop Interview
SJF Quarterly Interview
Young Parent Additional Assistance
Young Parent Commencement
Young Parent Information
Young Parent Review
Service Profile Appointment
BI Review
Initial LCTW Appointment
Subsequent LCTW Appointment
Case Coordination Initial Appointment
Case Coordination Follow up
Single Service Appointments
DSP Participation Follow up Interview
DSP Participation Initial Interview

DSP Participation Volunteer
Post Incapacitated Exemption Review

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