Complaints Register (RCR) Staff Operation

Introduction

The complaints register is designed to be an easy to use system for staff while providing management with tools to oversee, manage and report on complaints received by the organization.

The system manages complaints by ensuring that staff set follow-ups, and that management can see if there are any follow-up that has not had further action taken. RCS uses Microsoft Outlook to store reminders, and generate emails where required.

Operation

First Time User

The first time a user opens the system, it recognizes them as a new users and displays the following:



RCR obtains their PC or Network when it opens, and asks them to input their email address, and name details. These are then registered in the database for future use.

Entering a Complaint

When the system opens two buttons appear near the top of the screen: Complaints System - Current User is Rot



Clicking on Enter a New Complaint opens up the relevant input boxes:

🕻 Complaints System - Current User is Rob Horton	
Enter a New Close Complaint Member No. Last Name First Name or Initials	
234367 JUNES ELLA Date Received - Amend If Required Area of Complaint How Complaint was Received 29/07/2008 Collections Phone	
Details of the Complaint Member phoned complaining tha the collections staff keep calling her asking for money. I advisd her that I would refer it to the manager of thqat section who would call her back. Type Of Action Taken Send Email To Referred to Other Staff Louise Ryan	
Notes of Action Taken	Sun Mon Tue Wed Thu Fri Sat 29 30 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 10
Update the Database	20 21 22 23 24 25 26 27 28 29 30 31 1 2 3 4 5 6 7 8 9
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- The staff member enters the relevant details for the complaint, above the blue line.
- The system will not allow the complaint to be saved until all fields are completed.
- The **Area of Complaint** and **How Received** drop down boxes can be set up to suit the individual organization needs.
- Action taken (below the blue line), must be completed before the Complaint is saved. Basically, once the complaint has been received, something must be done.
- The **Type of Action Taken**, includes, Will Follow Up, Referred to, and Resolved - Close Call. If any action other than Resolved, is chosen, then a follow up date MUST be set, using the calendar provided.
- If referred to other staff is chosen, then the **Send Email To** drop down box appears, and the email recipient is chosen.
- Notes regarding the action must be entered.
- When the **Update the Database** button is clicked, if all data has been entered correctly, the database is updated and:
 - . A reminder is set in Outlook for the operator to remind the to follow up
 - . If referring to another staff member RCR access Outlook and might show the following.

	Microso	oft Office Outlook
		A program is trying to access e-mail addresses you have stored in Outlook. Do you want to allow this?
		If this is unexpected, it may be a virus and you should choose "No".
		Allow access for 1 minute
		Yes No Help
C	Click Y	es to allow Outlook to show the email
ā	🖬 Complain	t from Member: 234567 - ELLA JONES - Message

Complaint from Member: 23	34367 - ELLA JUNES - Message	
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To Iryan@imcuc.om.au		
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Subject: Complaint from Membe	per: 234567 - ELLA JONES	
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Hi Louise I am referring this complaint to Details are: Member phoned complaining t call.her.back. Regards Rob.	o you for action tha the collections staff keep calling her asking for money. Ladvisd her that I would refer it to the	.manager of thgat section who would.

Emails automatically generated by RCR, include details of the complaint.

The process for entering the complaint is completed and the operator can exit the system.

<u>Viewing or Updating a Complaint.</u> When **View or Update a Complaint** is clicked, the following appears:



Entering the Member Number or the Last Name (or part thereof) relating to the specific complaint required, and clicking **Find the Complaint** will display a list of items that match the search criteria:

2	34567	JONES	ELLA	

Clicking on relevant entry will display all details for that entry.

	- Current User i	s Rob Horto	n			
1	-				Click to Select the Complaint to View	or Update
		Member No		~~	9 234567 JONES ELLA	· · · · · · · · · · · · · · · · · · ·
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Basic details of the complaint are shown and the box on the right hand side, shows all history of the complaint to date.

As can be seen from the example above, the box backgrounds are light grey. The data (historical) cannot be altered.

Details of the complaint can then be updated, as described for a new complaint.

End of Document - see separate document for Management Functions

Rob Horton August 2008

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