

# 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:

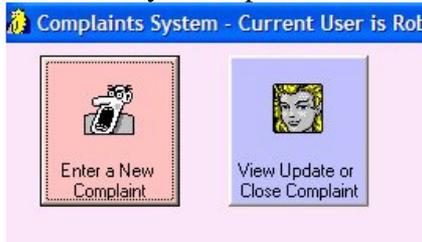


The screenshot shows a window titled "First Time - Enter your Details" with a yellow background. It contains four input fields: "PC Logon" with the value "rob", "Email Address - eg: rhorton@imcu.com.au" with the value "rhorton@imcu.com.au", "Last Name eg: Horton" with the value "Horton", and "First Name eg: Rob" with the value "Rob". A "Done" button with a green checkmark icon is located to the right of the fields.

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:



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

Complaints System - Current User is Rob Horton

Enter a New Complaint | View Update or Close Complaint

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Member No: 234567 | Last Name: JONES | First Name or Initials: ELLA

Date Received - Amend If Required: 29/07/2008 | Area of Complaint: Collections | How Complaint was Received: 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.

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Type Of Action Taken: Referred to Other Staff | Send Email To: Louise Ryan

Notes of Action Taken: Referred to Louise

Follow Up Date

Jul 2008 | Jul | 2008

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
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

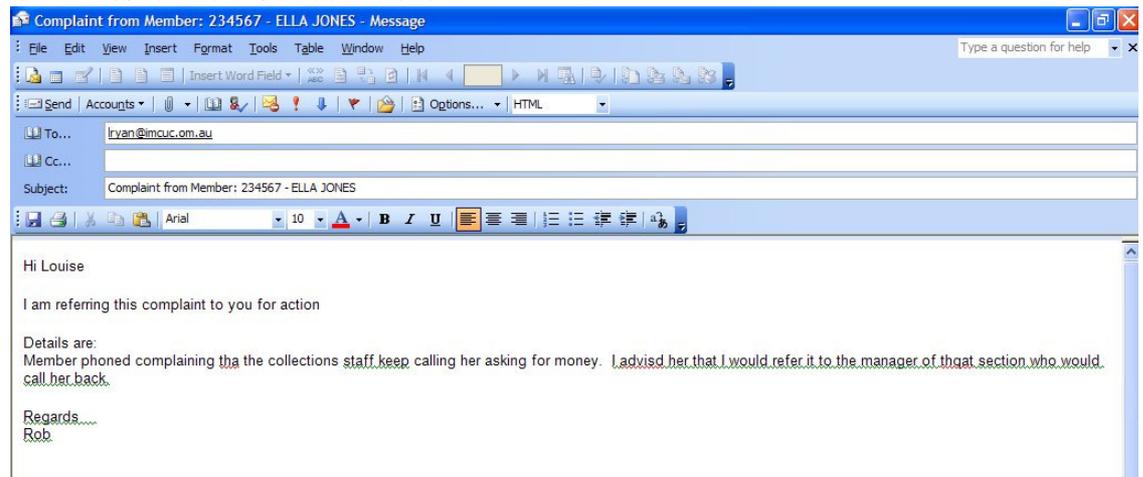
Update the Database | Exit (Chooof Off)

Windows Taskbar: start | Complaints Register | Paint Shop Pro | Complaints System - ... | EN | 7:48 AM

- 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.



Click **Yes** to allow Outlook to show the email.



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

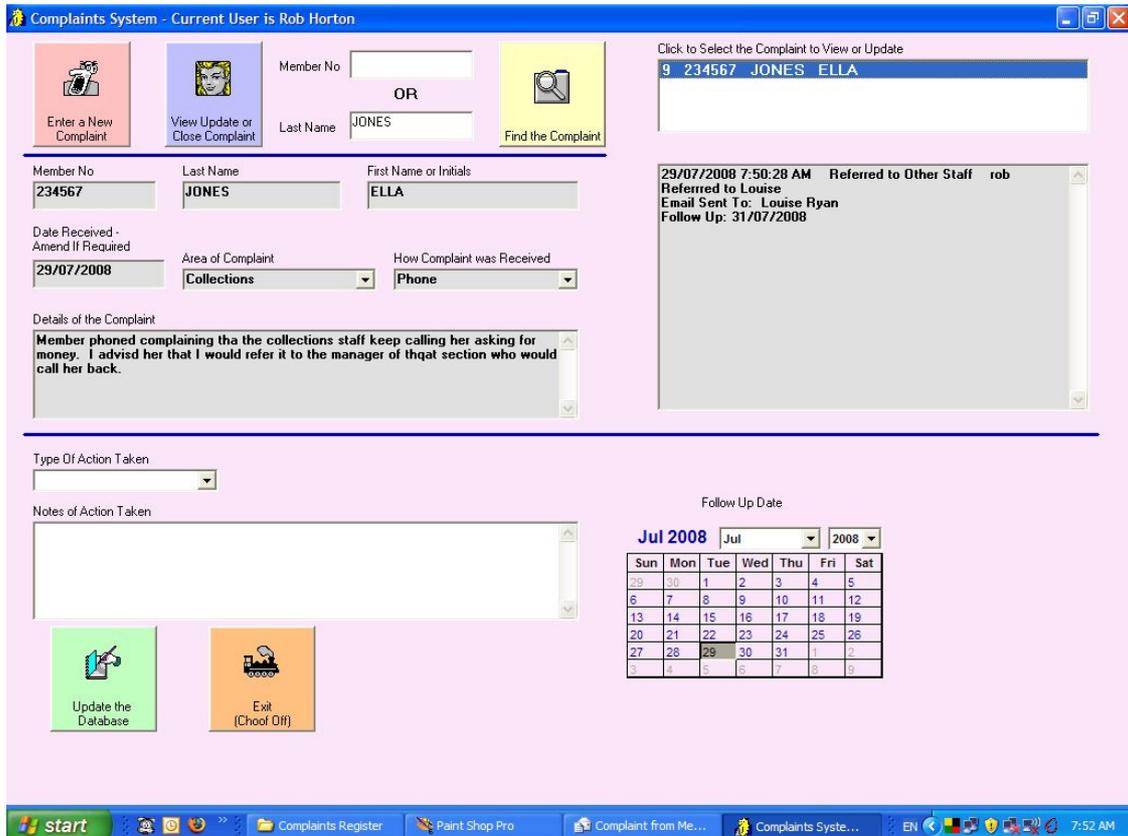
The process for entering the complaint is completed and the operator can exit the system.

### **Viewing or Updating a Complaint.**

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:

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



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

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August 2008

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