P312 - NEW CUSTOMER ENGAGEMENT

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P312	NEW MEMBER ENGAGEMENT PROCEDURE

1. Process Control

The Customer Relations Officer (CRO) is accountable for the new Customer/Client engagement function and is directly supported by the Customer Relations Assistant (CRA). The need for effective and efficient process controls is imperative as there are many dependencies between this function and others across the organisation.

The following general controls are applied:

- Dedicated directories and file structures to store business documents
- The use of standard form templates
- The use of comprehensive checklists
- Timely status meeting within the group and with related functional teams
- A standard management reporting approach

Compliance with the organisation's continuous improvement strategy and the internal auditing function also ensures regular assessment of the process controls.

2. Enquiries and Referrals

The CRO has primary responsibility for the engagement of new Customers/Clients. New Customer/Client engagements occur in a number of ways such as:

- Government directed referrals (DSA, NDIS)
- Insurance company referrals
- Other agency referrals
- The individual in person or an associate
- Networking contacts (i.e. attendance at industry forums)

There are no eligibility criteria to satisfy for Enhanced Lifestyles and Lifestyle Assistance and Accommodation Service service provision particularly where required screening is performed by other bodies (i.e. DCSI).

Note: Enhanced Lifestyles and Lifestyle Assistance and Accommodation Service does not provide aged care services. Any enquiry regarding persons over 65 years of age who are not current Customers/Clients of Enhanced Lifestyles and Lifestyle Assistance and Accommodation Service can be directed to the My Aged Care website for information regarding such service provision.

2.1 New Customer/Client Contact

The CRA is the primary contact for initial prospective Customer/Client enquiries. This information may be as a result of an enquiry or a formal request (e.g. referral) for service provision. All new Customer/Client enquiries must be directed to the CRA, however, any member of the Operations Team may receive information that could lead to the engagement of a new Customer/Client.

Where the CRA manages an initial contact it is essential that as much Customer/Client information is obtained as possible during the initial contact. Minimal information to be obtained is:

- Customer/Client name and address
- Preferred name
- Contact person (and relationship to Customer/Client where not the Customer/Client)
- Contact details
- Funding type

Where possible, the following information is also to be requested:

- NDIS number
- Whether the Customer/Client has an NDIS plan and if a copy could be provided at their earliest opportunity or during the consultation
- Services required
- Any special training needs for support staff (i.e. complex support)

Where the new Customer/Client is already receiving services from another provider and has access to their contract the CRA shall request the Customer/Client to provide the following current contract details – number of funded hours, kilometres funded, types of support. If all required information is not secured at this point it will be needed as part of planning a consultation.

All details provided are to be recorded on an Initial Customer Contact form (QF102) and an entry summarising the enquiry in the referral spreadsheet (QF122): *Quality & Services\Customer Relations\Controls\Referral Control Sheet*.

Note: There may be circumstances where a new Customer/Client's representative is their primary contact, particularly during the planning phase. In these instances, the CRA must record and retain the representative's contact details for future reference.

Referrals

All referral details obtained are to be entered on the Initial Customer Contact form (QF102) by the CRA who will also record all referrals on the referral spreadsheet (QF122): *G:\Quality & Services\Customer Relations\Controls\Referral Control Sheet* (or this recording may be accommodated by the "overall" monitoring tool/spreadsheet)

2.2 File Setup

The CRA will establish a new Customer/Client file in the following directory: *G:\Quality & Services\Customer Relations\ENQUIRIES AND REFERRALS* This file is used to retain all enquiry, referral and, where previously provided, contract information. To be amended to reflect Kyra's new spreadsheet approach.

2.3 Disseminate Information

The CRA will provide the Billing Officer with Customer/Client and funding details immediately after they are obtained. The Learning and Development Officer is to be provided with all training-related information as soon as possible.

2.4 Making Referrals

Informal referrals are made by providing the requesting Customer/Client with contact information about other services or agencies. When a referral is made to another agency by the CRO the referral will ensure that:

- confidentiality and privacy of the Customer/Client is maintained at all times
- the CRO has clarified with the Customer/Client the service needs they have expressed
- the Customer/Client is given an accurate picture of the other agency and its service
- the other agency is given full and honest referral information
- with the verbal permission of Customer/Client information is shared with another agency if required
- records of contact with the Customer/Client and the other agency are kept by the CRO through the means of notes and relevant correspondence.

The CRO shall retain all relevant referral communications (i.e. emails) in the following directory: H:\Coordination\Consumer

2.5 Use of Referral Data

Information recorded on the Referral Control Spreadsheet (QF122) is used by the Marketing and Communications Officer to influence future marketing strategies.

2.6 Information Management

All new Customer/Client information received by Enhanced Lifestyles and Lifestyle Assistance and Accommodation Service personnel, either verbally or in writing, is the responsibility of the Customer Relations Officer (CRO). Information required by other members of the organisation must be provided as required at the earliest possible opportunity.

3. Consultation Planning

In accordance with referral or new Customer/Client enquiry information the CRO and CRA will use the information to plan a consultation in order to obtain all required information and complete all necessary paperwork.

The audit trail will be the checklists completed by the CRO and CRA. All consultation specific information must be retained in the Customer/Client file by the CRA including emails at closure of the 8-week transition period.

NOTE: Consideration will be given for the provision of a free trial period of service provision where it can secure those Customers/Clients who were previous Customers/Clients of the organisation and where the aim is to re-engage them. Need to define how this is done/managed – how recorded, who advised etc

3.1 Customer/Client Participation

The CRO will undertake new Customer/Client planning by actively supporting Customer/Client participation when planning a consultation. This may involve determining any specific requirements that may be arranged by other bodies (e.g. interpreters, advocates). Reasonable measures will be taken to accommodate Customers/Clients in non-metro/remote areas. If a Customer/Client's representative lives in a rural and remote location, a telephone link may be organised so they can be included.

3.2 Consultation Setup

The CRA will schedule the consultation that will in principal commence an 8-week transition period whereby service provision is setup, commenced and monitored for an 8-week period by the CRO to ensure effective and efficient service provision through a stable, fit-for-purpose support team.

A setup checklist (QF115b) is used by the CRA to control task progress.

3.3 Secure Contract Information

The CRA must secure contract information whether it be NDIS details or contract information related to a prior service provision arrangement.

Need to add a bit more definition here about contract info – i.e. Billing retrieving info from DCSI and what they need it for and how/if it impacts on cvustomer service provision.

3.4 CRO Determinations

The CRO will determine the consultation method and all consultation requirements based on information retrieved during the initial Customer/Client contact or referral tasks. This information will determine the consultation setup actions taken by the CRA.

A consultation may be performed through a home visit or the use of emails and phone calls where the service provision involves minimal hours support per week where Customer/Client engagement can be achieved through emails and phone calls. A Customer/Client may choose to have another person present to assist them with the engagement process.

3.4.1 Schedule Home Visit Consultation

The CRA will book a home visit consultation with the new Customer/Client at a suitable time for both parties. When making the booking the CRA will request the following information from the Customer/Client unless obtained during the initial contact:

- Funding source(s)
- NDIS number
- Type of services covered by the funding

- Number of funded hours (including kms funded)
- If they can provide a copy of their NDIS plan
- Potential staffing requirements
- Is the Customer/Client bringing support workers with them and will they need training?
- Are there any complex or standard training requirements to be met to provide support?
- What is the urgency of training?
- Does the Customer/Client have training requirements for themselves?
- The Customer/Client's landline or mobile number to be used by Care Worker's to clock in and out (where the Customer/Client will allow this – otherwise Care Worker's will be issued with a token by the Payroll Officer)

When this information is obtained and recorded by the CRA the Billing Officer and Learning and Development Officer will be provided with their information requirements immediately.

The CRO will be aware/notified of the booking through an event/meeting being scheduled in Outlook. The CRA may also verbally inform the CRO of the booking. The CRA must set a reminder to confirm the booking the day before? the scheduled consultation.

3.4.2 Schedule Email/Phone Call Consultation

Where the consultation is to be managed using the phone and email the CRA will contact the new Customer/Client to determine a mutually suitable date and time to commence the process. The CRA will then schedule sufficient time in the CRO's Outlook calendar for the initial call (allow half hour) and managing emails.

When making the booking the CRA will request the following information from the Customer/Client <u>unless obtained during the initial contact</u>:

- Funding source(s)
- NDIS number
- Type of services covered by the funding
- Number of funded hours (including kms funded)
- If they can provide a copy of their NDIS plan
- Potential staffing requirements

- Is the Customer/Client bringing support workers with them and will they need training?
- Are there any complex or standard training requirements to be met to provide support?
- What is the urgency of training?
- Does the Customer/Client have training requirements for themselves?
- The Customer/Client's landline or mobile number to be used by Care Worker's to clock in and out (where the Customer/Client will allow this – otherwise Care Worker's will be issued with a token by the Payroll Officer)

When this information is obtained and recorded by the CRA the Billing Officer and Learning and Development Officer will be provided with their information requirements immediately.

The CRO will be aware/notified of the booking through an event/meeting being scheduled in Outlook. The CRA may also verbally inform the CRO of the booking. The CRA must set a reminder to confirm the booking the day before the scheduled consultation.

3.5 Consultation Arrangements

The CRO will advise the CRA of any additional information required (i.e. policies, supplementary information) or any other arrangements to be made specific to the requirements of the consultation.

Home Visit Arrangements

The CRA, in consultation with the CRO if required, will address the following arrangements in accordance with specified or pre-determined timings:

- Add the consultation to the Outlook Calendar allowing sufficient travel time
- Book the company car and accommodation where required
- Determine any location and travel details as required
- Add all CRO directed additions to a standard Welcome Pack
- Provide the Welcome Pack to the CRO

Online Consultation Arrangements

The CRA, in consultation with the CRO if required, will add the consultation booking to the Outlook Calendar and add all CRO directed additions to a standard Welcome Pack and forward it as directed to the Customer/Client in accordance with specified or pre-determined timings.

3.6 Service Quote

The CRO will use previously secured information to produce a service quote using the following information:

- Type of services required and number of funded hours (including kilometres funded)
- Potential staffing requirements
- The funding source(s)

Need a description of “how” to produce a service quote

3.7 Teleclock – Customer/Client Setup

A new Customer/Client must be created in Teleclock as part of the time recording and billing functions and their phone number locked down by the CRA as the only number to be used by Care Worker’s to clock on and off

Where the Customer/Client will not allow the use of their phone the Payroll Officer is to be advised by email and tokens will be arranged for the assigned Care Worker’s. The Payroll Officer will email the details associated with token assignment to the CRA so that the SDT can be advised as part of setting up the Customer/Client’s support team.

The CRA will setup a Customer/Client and lock down a phone in Teleclock by actioning the instruction located in Appendix A.

Note: Teleclock must be setup before the CIMS profile.

3.8 CIMS Profile

The CRA will establish a CIMS profile for the proposed new Customer/Client where it is likely that they will sign-up. The minimum information to be recorded is the name, address and contact details but other details revealed such as date of birth and nature of disability may also be entered at this time.

3.9 Confirm Consultation

The previously set reminder will prompt the CRA to contact the Customer/Client to confirm the timings associated with the booked consultation. Where a booking is changed the CRA will re-schedule the consultation for a mutually suitable time for both the CRO and the Customer/Client. It may be necessary for the CRA to advise the CRO of any changed booking.

4. Consultation

4.1 Daily CRO Task Assignment

The CRA is responsible for addressing all follow-up tasks after initial contact with a new Customer/Client (i.e. all tasks in section 3). This will include compiling all information and items in advance that are required for a consultation.

The CRA will produce a daily running sheet for the CRO that will be a list of scheduled CRO tasks for the day, including online consultations. This daily running sheet will be provided to the CRO with all required information and items at the start of each working day.

4.2 Home Visit Consultation

The following actions are taken for a home visit consultation by the CRO:

- Record the time of arrival
- Complete a vehicle log entry upon arrival
- Verify any special consultation requirements (e.g. interpreter)
- Explain the consultation process
- Inform the Customer/Client of Enhanced Lifestyles and Lifestyle Assistance and Accommodation Service services and initiatives
- Provide the Customer/Client with a Welcome Pack to read after the consultation

- Confirm the Customer/Client's personal details on file (including the phone no to be used by Care Worker's)
- Confirm Care Worker and Customer/Client training requirements previously provided
- Secure and record NDIS and Funding details
- Define and record individual support requirements (Q306)
- Develop a service quote (where required)
- Produce the Service Agreement & sign-off if possible
- Sign-off all new Customer/Client forms
- Conduct and record WHS assessment
- Identify and record information for Communication Book components:
- (Emergency Plan, Evacuation Plan)
- Final discussion re Enhanced Lifestyles and Lifestyle Assistance and Accommodation Service services and initiatives
- Record the time of departure

The CRO will compile all information obtained and provide funding and training information to the CRA for dissemination and notify of the service commencement date.

Note: It is acknowledged that the conduct of each consultation will be adjusted as required by the CRO to accommodate the situation (i.e. the Customer/Client may have special requirements, the meeting location may be noisy etc.) There also may be a need to conduct a follow-up consultation where required.

4.3 Email/Phone Call Consultation

The CRO will use one or a combination of methods (phone call, email) in order to retrieve and record the following information as per the CRA scheduled time.

- Inform Customer/Client of EL services and initiatives
- Confirm personal details on file
- Secure and record NDIS and funding details
- Service offering – using the service quote prepared or obtaining information to produce and send it

- Identify and record personal support information for Comms Book (e.g. Evacuation plan)

The CRO will compile all information obtained and provide funding and training information to the CRA for dissemination and notify of the service commencement date.

The WHS assessment information, secured by an assigned Care Worker will be requested to send the completed report to the CRA for scanning and filing.

5. Establish Services

There may be a need for the CRA to organise a follow-up visit by the CRO to complete all information retrieval. When all consultation has been completed the following actions are undertaken by the CRA to establish services for a new Customer/Client.

1. Notify Head Office of the New Customer/Client

Insert here an example of the standard notification

2. NDIS Information notified to Billing Officer:
    - NDIS number
    - Request a copy of the NDIS plan
    - Services to be covered by the funding
    - Agreed amount allocated to Enhanced Lifestyles and Lifestyle Assistance and Accommodation Service
    - If they are receiving 20 hours or more personal care and community access per month
    - Name of Customer/Client to be billed
    - Address to be billed to
    - Contract number to be billed
    - Email address to be billed to

3. Other Actions:
    - Customer/Client File Verified/Updated
    - Advise L&D Officer of assigned Care Worker's re training needs
    - Produce Service Quote (where required)
    - Produce Service Agreement & Forward to Customer/Client (where required)
    - Other Documents Provided (where applicable)

4. Establish Support Team:
   - Source Care Worker's (recruit if required)
   - Arrange Meet & Greet (using QF 104)
   - Follow-up Meet & Greet
   - Establish Customer/Client Roster
   - Provide Individual Support Plan to assigned Care Worker's
   - Advise Learning and Development Officer of Care Worker details (where training required)
   - Notify SDT of new roster
   - Advise Care Worker's of clock-in phone number
     (Payroll Officer sends tokens to Customer/Client to issue to Care Worker's)
   - Arrange Care Worker to conduct WHS assessment (where required)

5. Update Regions Database
6. Assign Member to Coordinator Spreadsheet & Advise
7. Manage Returned Signed Documents
8. Scan & File Returned Signed Documents
9. Forward Copies for Customer/Client Retention
10. Create Communication Book and Send (where requested)
11. Confirm WHS Assessment, Retrieve Form and File (where required)

Commence 8-Week Transition

The day that the provision of support services commences is the day that an 8-week transition period begins. During this transition period the CRA is responsible, in consultation with the CRO as required, for addressing all aspects of the new Customer/Client's service such as the roster, actioning shift replacements and escalating issues to the CRO.

Meet and Greet Management

The CRA undertakes the following action to manage a Meet and Greet:

- Complete a Meet and Greet form with as much detail as possible
- Enter a CIMS progress note with note type MEET AND GREET
- If no available staff, fill in recruitment request form and submit to Payroll
- Care Worker's sourced and advised of scheduled event
- Customer/Client notified of event details

- Follow up with both Customer/Client and Care Worker after the scheduled Meet and Greet to identify if there are any further needs.
- Enter a CIMS progress note under note type FOLLOW UP MEET AND GREET
- The CRA will then proceed to establish the Customer/Client's roster.

6. 8-WEEK TRANSITION

The CRO will advise the CRA of any communication requirements during this period.

As well as addressing any service and/or roster changes during this period the CRA, where directed by the CRO, will verbally contact the Customer/Client during weeks 1,3,5 and 8 to enquire if there any service concerns to be addressed (e.g. Care Worker performance, suitability).

Need more definition of the specific purpose and script for the new Customer/Client contacts during the transition period.

As well as the verbal contact, the CRA will send the new Customer/Client a satisfaction survey after weeks 4,8 and12-weeks and then action feedback as required.

Need more definition of the satisfaction survey process (i.e. questions, reporting).

The CRA will ensure sufficient progress notes are made to the Customer/Client's CIMS profile to evolve an audit trail of any changes actioned during the transition period. All other 8-week transition information will be filed with the Customer/Client's information on the H Drive.

7. Full SDT Transition

The CRO will advise the CRA of any action requirements during this period such as:

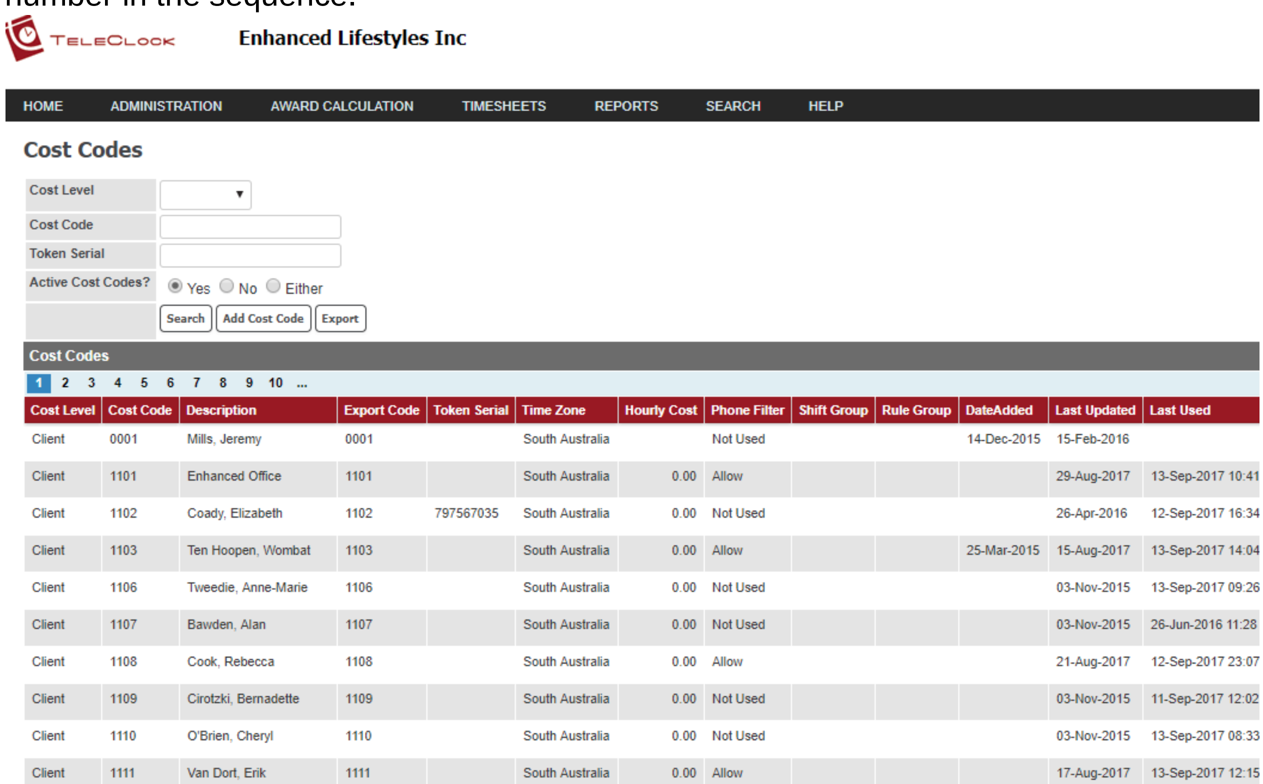
- Notifying head office of full transition of the Customer/Client to SDT support
- Providing reporting data
- Scheduling a formal handover to SDT
- Notifying the Customer/Client of full support transition
- Closing all relevant files and archiving as required.

APPENDIX A

TELECLOCK – NEW CUSTOMER/CLIENT SETUP

This instruction shows the function of creating a new Customer/Client in Teleclock and locking the Customers/Clients home phone number or mobile number.

1. Log onto Teleclock and hover over administration – click Cost Codes (see image below).
2. Press the last number on the bottom tab to reveal the last allocated number in the sequences – this will allow you allocate the new Customer/Client with next number in the sequence.


TeleClock Enhanced Lifestyles Inc

HOME ADMINISTRATION AWARD CALCULATION TIMESHEETS REPORTS SEARCH HELP

Cost Codes

Cost Level
Cost Code
Token Serial
Active Cost Codes? Yes No Either

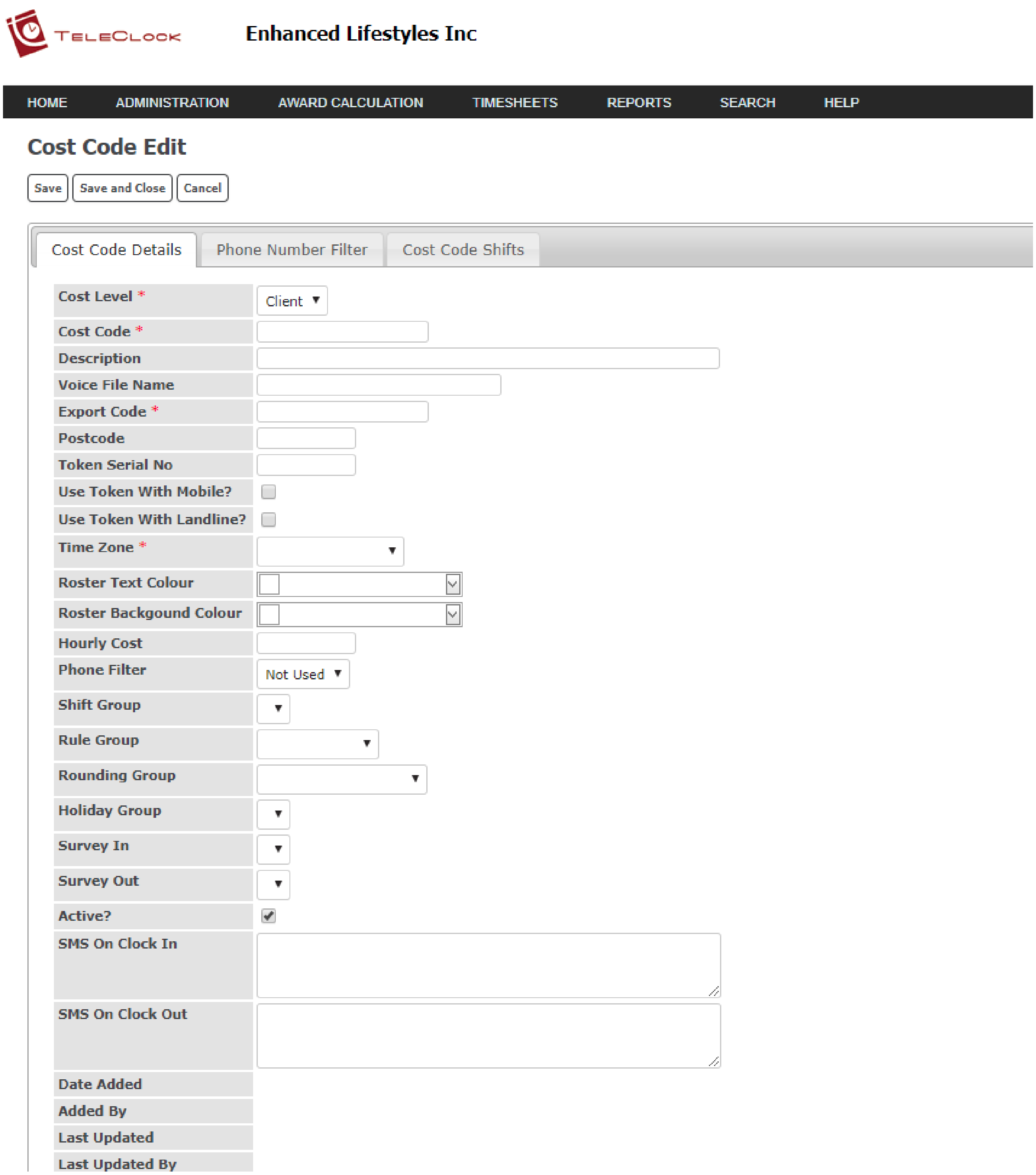
Search Add Cost Code Export

Cost Codes

1 2 3 4 5 6 7 8 9 10 ...

Cost Level	Cost Code	Description	Export Code	Token Serial	Time Zone	Hourly Cost	Phone Filter	Shift Group	Rule Group	DateAdded	Last Updated	Last Used
Client	0001	Mills, Jeremy	0001		South Australia		Not Used			14-Dec-2015	15-Feb-2016	
Client	1101	Enhanced Office	1101		South Australia	0.00	Allow				29-Aug-2017	13-Sep-2017 10:41
Client	1102	Coady, Elizabeth	1102	797567035	South Australia	0.00	Not Used				26-Apr-2016	12-Sep-2017 16:34
Client	1103	Ten Hoopen, Wombat	1103		South Australia	0.00	Allow			25-Mar-2015	15-Aug-2017	13-Sep-2017 14:04
Client	1106	Tweedie, Anne-Marie	1106		South Australia	0.00	Not Used				03-Nov-2015	13-Sep-2017 09:26
Client	1107	Bawden, Alan	1107		South Australia	0.00	Not Used				03-Nov-2015	26-Jun-2016 11:28
Client	1108	Cook, Rebecca	1108		South Australia	0.00	Allow				21-Aug-2017	12-Sep-2017 23:07
Client	1109	Cirotzki, Bernadette	1109		South Australia	0.00	Not Used				03-Nov-2015	11-Sep-2017 12:02
Client	1110	O'Brien, Cheryl	1110		South Australia	0.00	Not Used				03-Nov-2015	13-Sep-2017 08:33
Client	1111	Van Dort, Erik	1111		South Australia	0.00	Allow				17-Aug-2017	13-Sep-2017 12:15

3. Click on the button Add Cost Code – this will bring up a screen which will enable the CRA to add a new Customer/Client (see image below).


TeleClock Enhanced Lifestyles Inc

HOME ADMINISTRATION AWARD CALCULATION TIMESHEETS REPORTS SEARCH HELP

Cost Code Edit

Save | Save and Close | Cancel

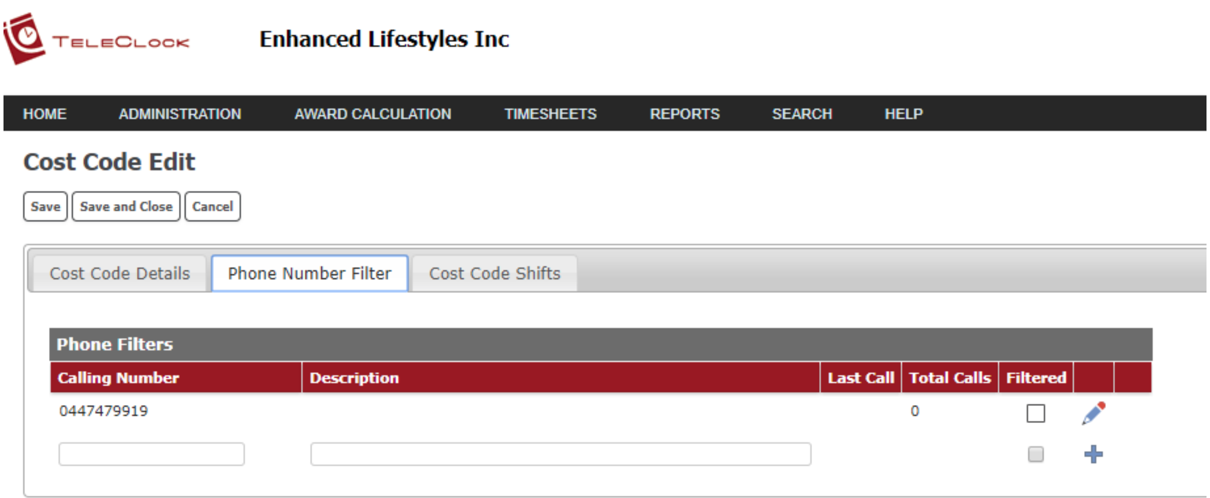
Cost Code Details | Phone Number Filter | Cost Code Shifts

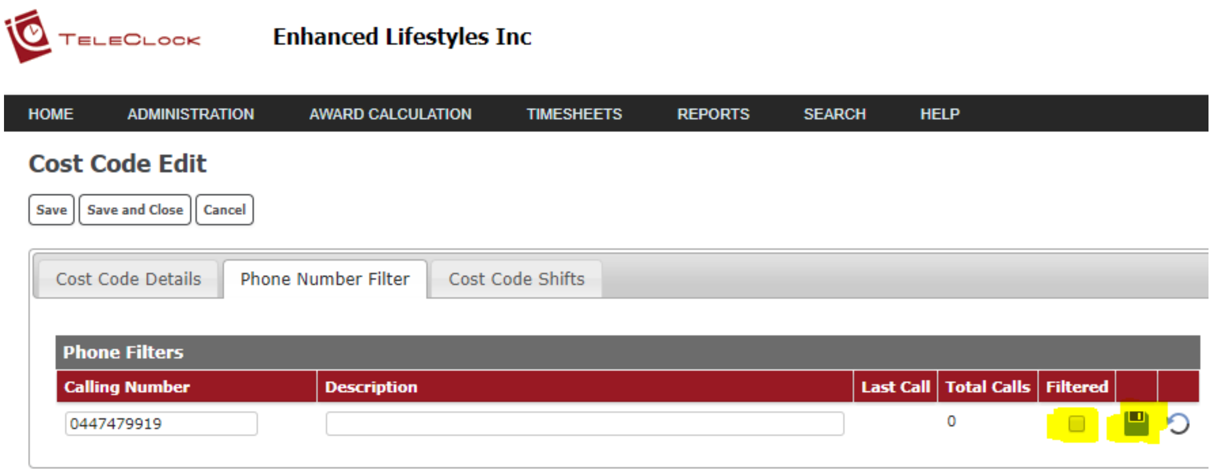
Cost Level *	Client
Cost Code *	
Description	
Voice File Name	
Export Code *	
Postcode	
Token Serial No	
Use Token With Mobile?	
Use Token With Landline?	
Time Zone *	
Roster Text Colour	
Roster Backgound Colour	
Hourly Cost	
Phone Filter	Not Used
Shift Group	
Rule Group	
Rounding Group	
Holiday Group	
Survey In	
Survey Out	
Active?	✓
SMS On Clock In	
SMS On Clock Out	
Date Added	
Added By	
Last Updated	
Last Updated By	

4. Add:
   a. Cost code – which is the next 4-digit number in the previous sequence.
   b. Description: Last Name, First Name

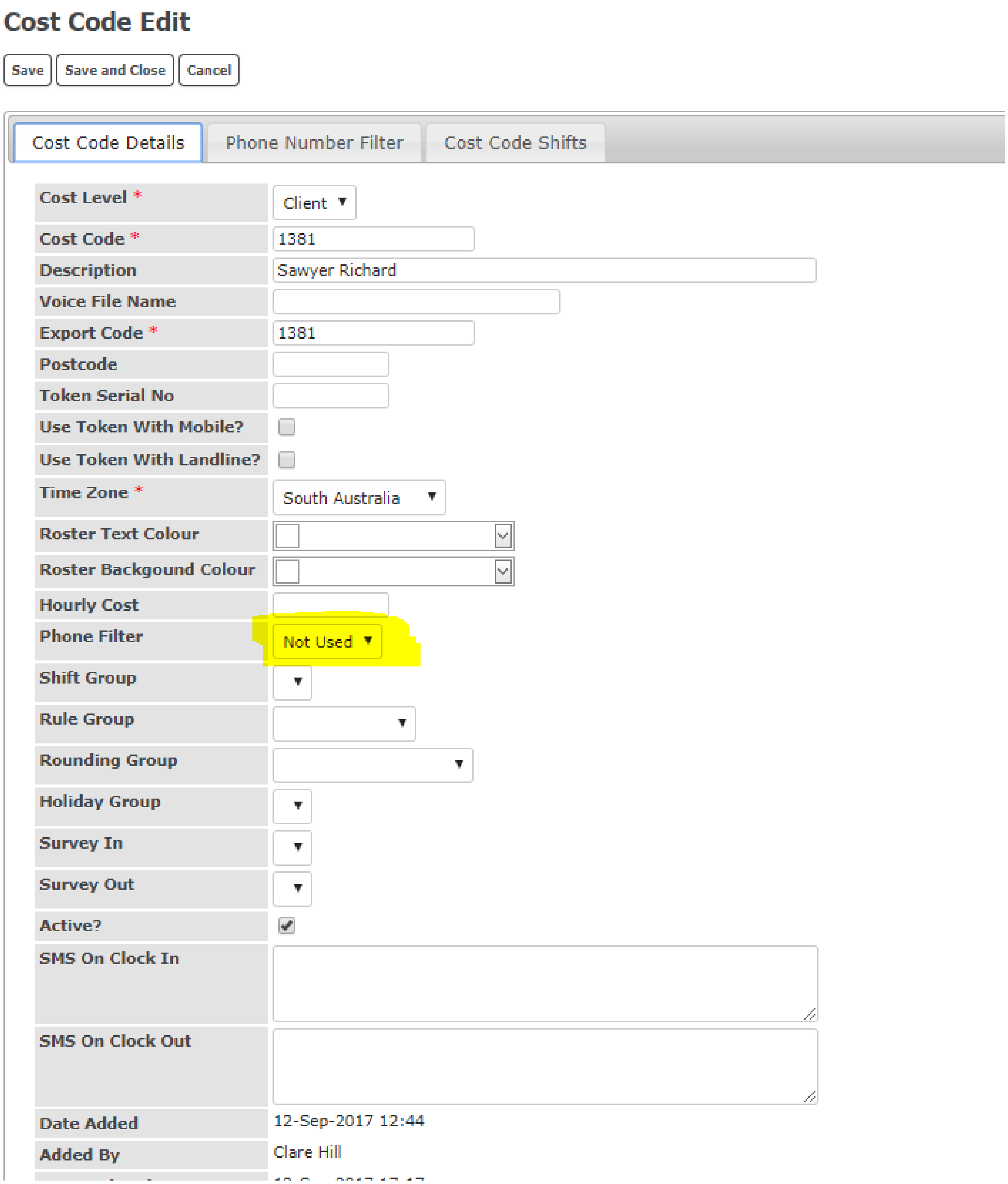
c. Export Code: The same 4-digit number as cost code number
d. Time Zone: Select South Australia
e. Active: Click the tick box

5. After this is complete click on the next tab – description "Phone Number Filter" and add a calling number. For Home phone numbers put a 08 in the front of this. Click the + Button – this will add this. The CRA is required to click on the little pencil key and click the filtered tick box and click the save icon (see images below).





6. Click back on Cost Code Details tab to the left and go down to phone filter – press allow (see image above). This enables the Care Worker to only clock in and out with the allocate number added. If allow is not selected Care Workers can still clock on and off with their mobiles. Once completed click on the save and close – this now will be saved for the new Customer/Client.

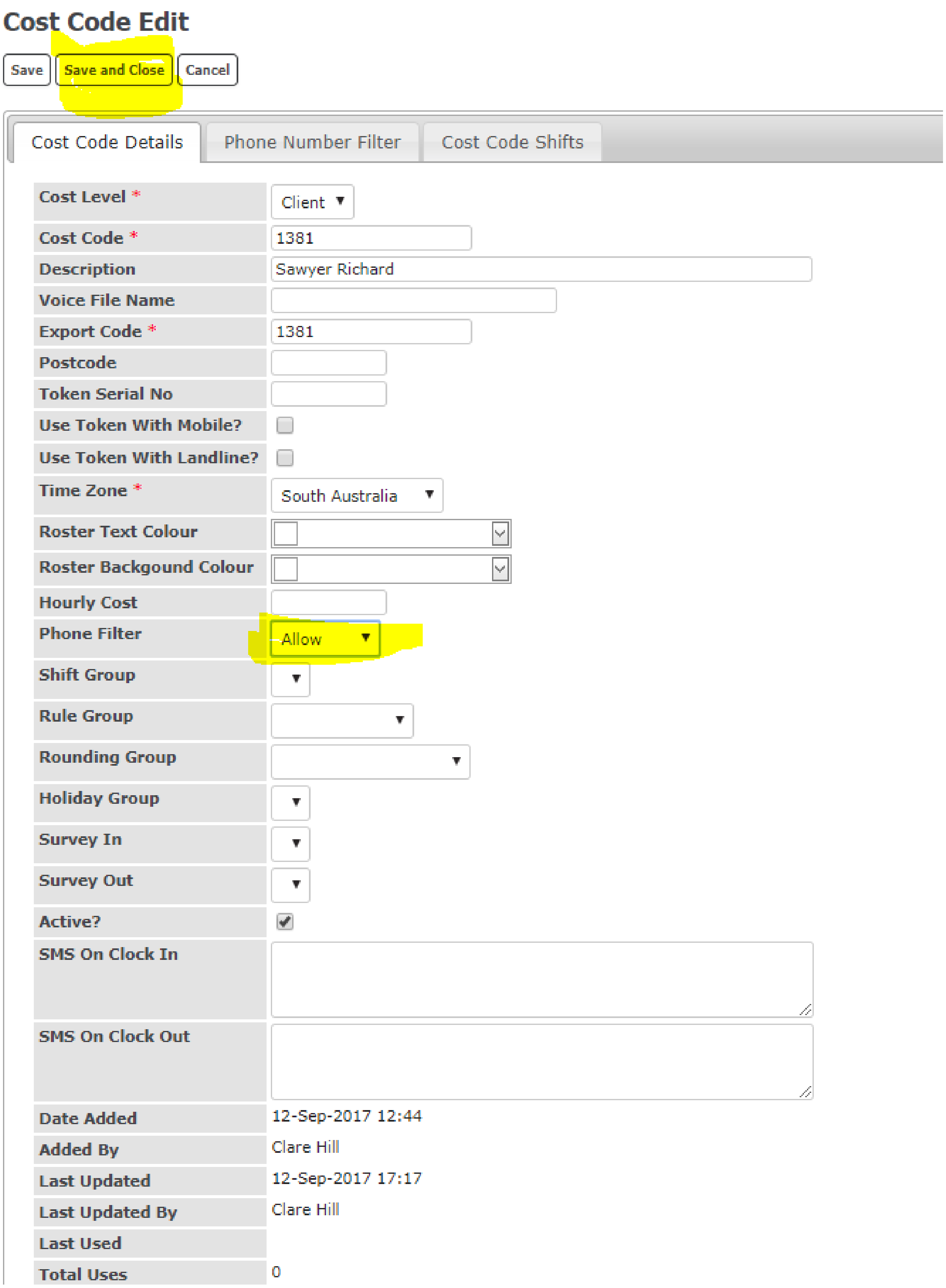


Cost Code Edit

Save | Save and Close | Cancel

Cost Code Details | Phone Number Filter | Cost Code Shifts

Cost Level *	Client
Cost Code *	1381
Description	Sawyer Richard
Voice File Name	
Export Code *	1381
Postcode	
Token Serial No	
Use Token With Mobile?	
Use Token With Landline?	
Time Zone *	South Australia
Roster Text Colour	
Roster Backgound Colour	
Hourly Cost	
Phone Filter	Not Used
Shift Group	
Rule Group	
Rounding Group	
Holiday Group	
Survey In	
Survey Out	
Active?	✓
SMS On Clock In	
SMS On Clock Out	
Date Added	12-Sep-2017 12:44
Added By	Clare Hill



Cost Code Edit

Save | Save and Close | Cancel

Cost Code Details | Phone Number Filter | Cost Code Shifts

Cost Level *	Client
Cost Code *	1381
Description	Sawyer Richard
Voice File Name	
Export Code *	1381
Postcode	
Token Serial No	
Use Token With Mobile?	☐
Use Token With Landline?	☐
Time Zone *	South Australia
Roster Text Colour	
Roster Backgound Colour	
Hourly Cost	
Phone Filter	Allow
Shift Group	
Rule Group	
Rounding Group	
Holiday Group	
Survey In	
Survey Out	
Active?	☑
SMS On Clock In	
SMS On Clock Out	
Date Added	12-Sep-2017 12:44
Added By	Clare Hill
Last Updated	12-Sep-2017 17:17
Last Updated By	Clare Hill
Last Used	
Total Uses	0