



OPENHousing Management System

Contact Management

Complaints, Appeals and Compliments User Guide

February 2017

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1.0 LOGGING COMPLAINTS

Before you commence logging a complaint within OPENHousing it is important you understand which parameters you will be selecting within the Main Code, Sub Code and Subject fields. It is important that you select the correct relevant fields to enable us to better analyse complaints to monitor trends and make improvements to the services our customers receive and expect.

The Main and Sub Codes you will now be using are as follows:

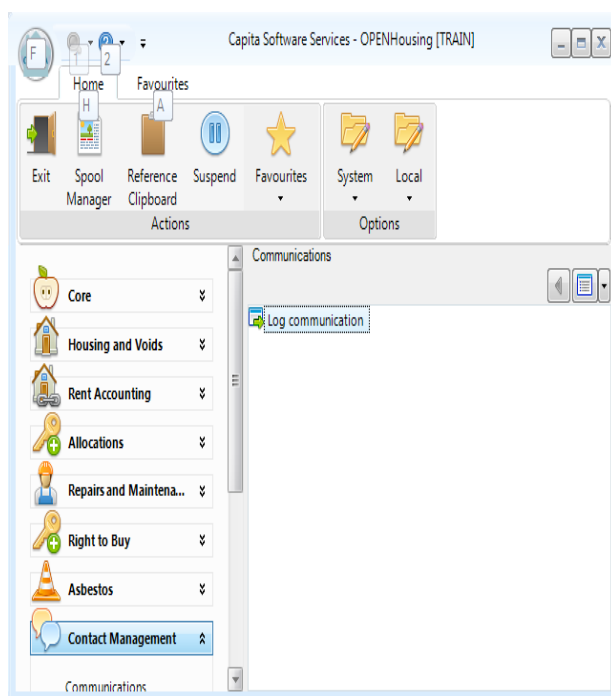
- **Behaviour / Attitude of staff** - Conduct/Behaviour of a staff member or contractor was not as expected
- **Poor Communication / Response** – a query, enquiry or communication was responded to in an unsatisfactory way
- **Quality of Work / Service** – work carried out or service delivered by a staff member or contractor was not at the expected standard
- **Timeliness / Service Delivery** – work carried out or service delivered by a staff member or contractor was not at the time expected or contracted or communicated

We have also bought in the use of the Subject field to record what/who the Main code of the complaint relates to. This is so that we can monitor trends in who/what the complaints are about.

The Subject field allows you to choose from:

- Advance Housing and Support
- Employee
- External Agency
- External Contractor
- Tenancy

You will now be ready to start logging your complaint:



Log into OPENHousing and from the main toolbar select:

Contact Management
Communications
Log Communication

Select the **Source** of the complaint from the options on the drop-down menu (e.g. In Person, Letter, Telephone).

Select the **Contact Type** from the options on the drop down-menu (e.g. Tenant, Relative, Member of Public etc).

Click on the **Person Search** button

Place	Address	Post Code
ABBE012000002	12 Abbey Grove Minster	CT12 4HB
ABBE013000011	Room 1 13 Abbey Rd	OX28 5LN
ABBE013000021	Room 2 13 Abbey Rd	OX28 5LN

Reference	Name	Status
138252	Mr. J. Field	CUR

The search screen you are presented with will depend on the Contact Type selected. If the Contact Type is a Tenant then you will get the Tenancy Search screen.

Regardless of which search screen you are presented with you should search for the name of the person making the complaint. If it is not available then you know that the person record has not already been created on the system and you need to click on the **Create** button and create the new person record.

NOTE: If the complainant is an existing tenant or service user, then there will be a person record on the system.

If the person making the complaint wishes to remain anonymous then you should select or create the person record details and then click on the **Anonymous** button.

When you are happy that you have completed all the details on the first screen then click **OK** and you will be presented with the following screen.

Person Type	Comm Ref	Date Created	Current Stage	Type	Category
Entity	6655	03/10/2016	Compliment Acknowledgment	Compliments	Compl
Originator	6655	03/10/2016	Compliment Acknowledgment	Compliments	Compl
Originator	6653	03/10/2016	Compliment Acknowledgment	Compliments	Compl
Entity	6653	03/10/2016	Compliment Acknowledgment	Compliments	Compl
Entity	6652	03/10/2016	Compliment Acknowledgment	Compliments	Compl

In the instance where you need to add more than one originator i.e. if a relative was making a complaint on behalf of a customer you would need to add the relative also. You do this by selecting **Add Originator**.

When you select **Add Originator** another Contact Management – Communication Logging screen will load. You follow the same process as you did to log the initial Source, Contact Type and Originator ‘the person’ making the complaint. In this example we will add the relative as an originator. Select **Person Search**.

Contact Name	Contact Type
Mr. Mark McDowall	Relative
Mrs Goodenough	Relative
Ms Yvonne Smit	Relative
Mrs Harker	Relative
Mr John Colley	Relative
Mrs M Turner	Relative
Miss Asima Aslam	Relative
Liz	Relative
Mr Samir Abu Sakran	Relative
Mrs Janet young	Relative

You will now be directed to a list of all the relative records created in OPENHousing. Type the last name in the **Name** box and press **return** on your keyboard.

If the relative you wish to select appears in the white box section under Contact Name and Contact Type you simply select them and select **OK**. If they don't appear you select **Create**.

Create Contact Details [TRAIN]

Code: REL100 Start: //

Type: Relative End: //

Title: Mr Initials: J

Forenames: James

Surname: Bloggs

Name: Mr Bloggs

Address

14 Test Street

Leicester

Leicestershire

LE11 1DP

Tel. 1: 0116 2999999 E-mail:

Tel. 2: Fax Number:

Areas: Payment Cycle: Sub Account Code:

Requires Rent Card PCOL ID: Source Type:

OK Create Cancel

Enter a **Code** in the code box. Unfortunately, you can't double-click here to see the last code entered so you will need to create one. The rule we follow is a 3 digit prefix of the originator type i.e. for relative it would be REL followed by a rolling number, in this example I have used REL100.

Enter:

Title

Initials

Forenames

Surname

Name i.e. how you wish the person to be addressed i.e. Mr Bloggs.

Address

Telephone number and email address where applicable.

Select **OK**.

Select Contact [TRAIN]

Contact Type: Relative

Name: bloggs

Contact Name	Contact Type
Mr Bloggs	Relative

OK Create Cancel

You will now see that originator record has been created.

Select **OK**.

IBS Contact Management - Communication Logging [TRAIN]

File Edit Help

Source: Telephone Contact Type: Relative

Person Search Title: Mr Initials: J Anonymous

Forename: James Surname: Bloggs

Address Search Address Search

Address: 14 Test Street Mailing Address:

Leicester

Leicestershire

Postcode: LE11 1DP Postcode:

Telephone Home: 0116 2999999 Work: Mobile:

Email Home: Work:

Person Type	Comm Ref	Date Created	Current Stage	Type	Categ
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OK Add Originator Exit

You will now see that originator has been pulled through.

Select **OK**.

Reference 0 [TRAIN]

Communication Maintenance

OK Exit Access Entity Add Entity Add Communication Menu Create Links

Person: Mr T Test Room 3, 13 Abbey Rd, Witney, Oxfordshire, OX28 5LG

Details:

Communication Type: **Complaint**

Main Code: **13 Abbey Rd** Sub Code: **Room 3**

Date Logged: 22/02/2017 + Time: 1400 Incident Date: / / + Time:

Work Group: **Tenancy** Case Worker: **194901**

Description: Mr T Test Room 3, 13 Abbey Rd, Witney, Oxfordshire, OX28 5LG

Address: Room 3 Mail Address:

13 Abbey Rd Search

Witney

Oxfordshire

Postcode: OX28 5LG Postcode:

Area: H21 Sub Area: LD

Identification Detail:

Person Type	Comm Ref	Date Created	Current Stage	Type	Category
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Type in summary details of the complaint into the **Details** box.

NOTE: Remember that this information can be seen by all users and you should only enter enough information to 'tell the story'. Do not include sensitive and confidential information, but enter details about the location of confidential information e.g. secure filing cabinets and office location.

Reference 0 [TRAIN]

Communication Maintenance

OK Exit Access Entity Add Entity Add Communication Menu Create Links

Person: Mr T Test Room 3, 13 Abbey Rd, Witney, Oxfordshire, OX28 5LG

Details: THIS IS A TEST COMPLAINT PLEASE IGNORE.

Communication Type: **Complaint**

Main Code: **13 Abbey Rd** Sub Code: **Room 3**

Date Logged: 22/02/2017 + Time: 1400 Incident Date: / / + Time:

Work Group: **Tenancy** Case Worker: **194901**

Description: Mr T Test Room 3, 13 Abbey Rd, Witney, Oxfordshire, OX28 5LG

Address: Room 3 Mail Address:

13 Abbey Rd Search

Witney

Oxfordshire

Postcode: OX28 5LG Postcode:

Area: H21 Sub Area: LD

Identification Detail:

Person Type	Comm Ref	Date Created	Current Stage	Type	Category
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Select **Complaint** from the **Communication Type** drop down menu.

Select the relevant code from the **Main Code** drop down menu.

The **Main Code** options are also repeated within the **Sub Code** drop down menu, therefore if you have selected Behaviour/ Attitude of Staff within **Main Code** you would select Behaviour/Attitude of Staff within **Sub Code**.

Enter the **Date Logged** (this can be backdated for cases that are being logged late, but which have been actioned).

Enter the **Incident Date** (date of occurrence from which complaint resulted from).

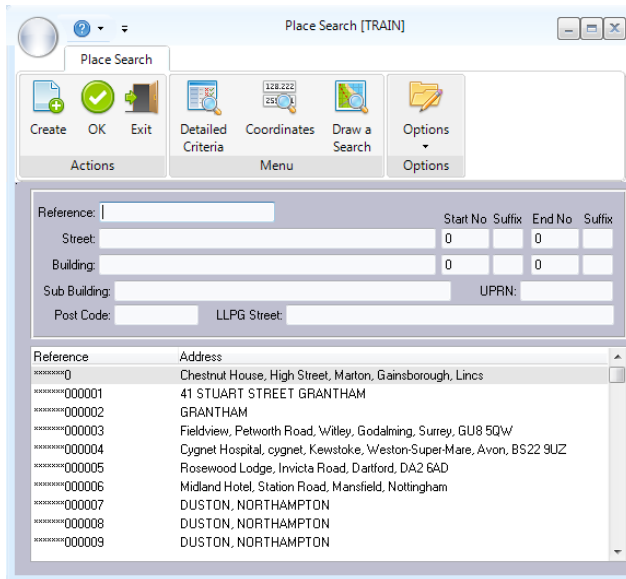
Select the **Work Group** i.e. Complaint Lead.

Select the **Caseworker** i.e. Complaint Lead that will be completing the investigation and managing the rest of the case in OPENHousing.

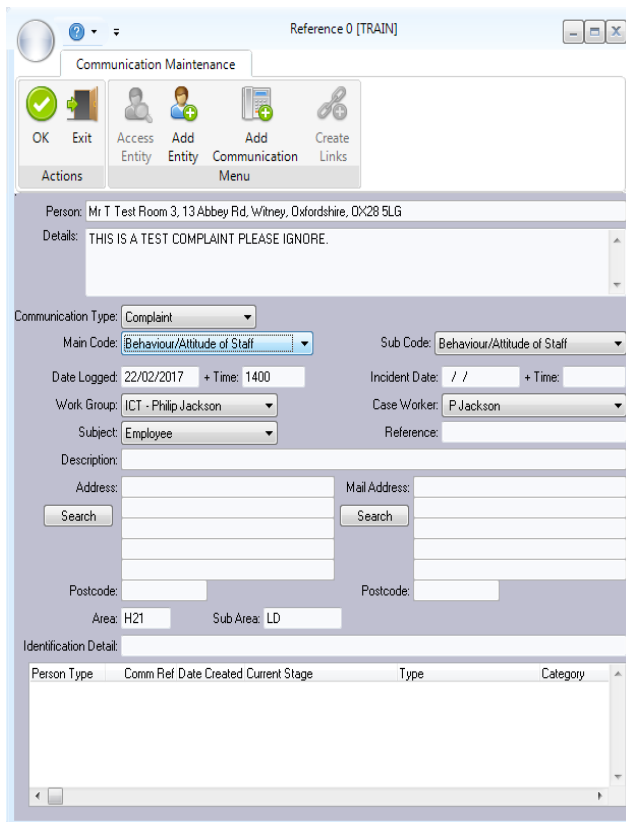
In **Subject** you should select one of the following options:

- Advance Housing and Support
- Employee
- External Agency
- External Contractor
- Tenancy

Dependent on the subject you select will define what you are able to select within the **Reference** box e.g. if you were to select external contractor or location, when you double click in the **Reference** box you will be able to select the contractor that the complaint relates to.



or select the location that the complaint relates to.

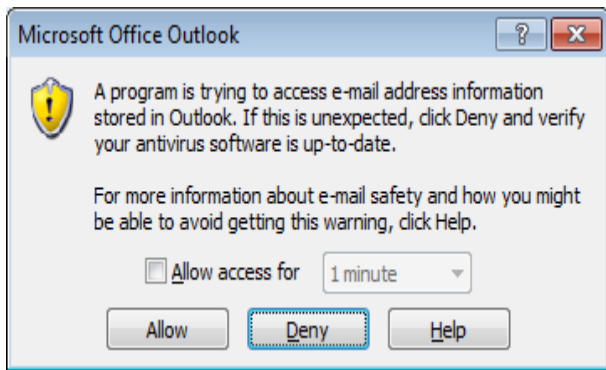


However, if you were to select Employee, External Agency or Group of People you can only enter the information as free text within the **Reference** field.

NOTE: All complaints are about Advance which includes contractors or agencies who provide services on our behalf. If the case is about some other person or organisation, then it is not a complaint and will be managed differently. If the complaint is about a tenant then this should not be logged as a complaint but should be logged under the Tenancy Management process.

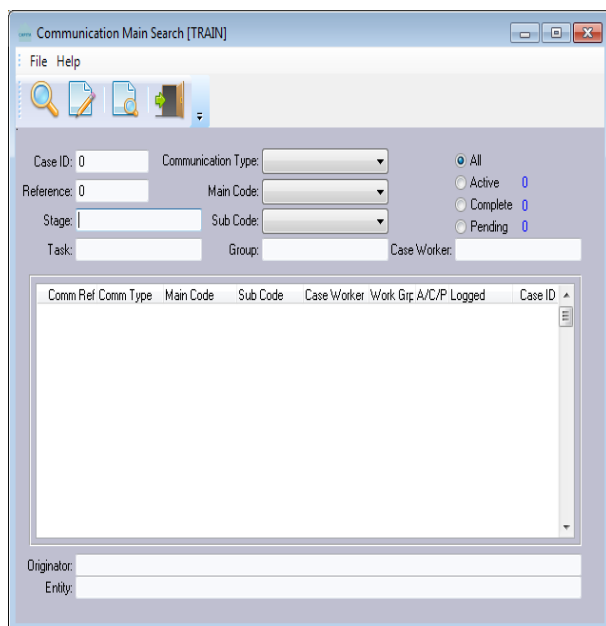
If you haven't already added the address of the property for which the complaint relates to you can also do this from the Address Search button.

Once you have completed the above select **OK**.



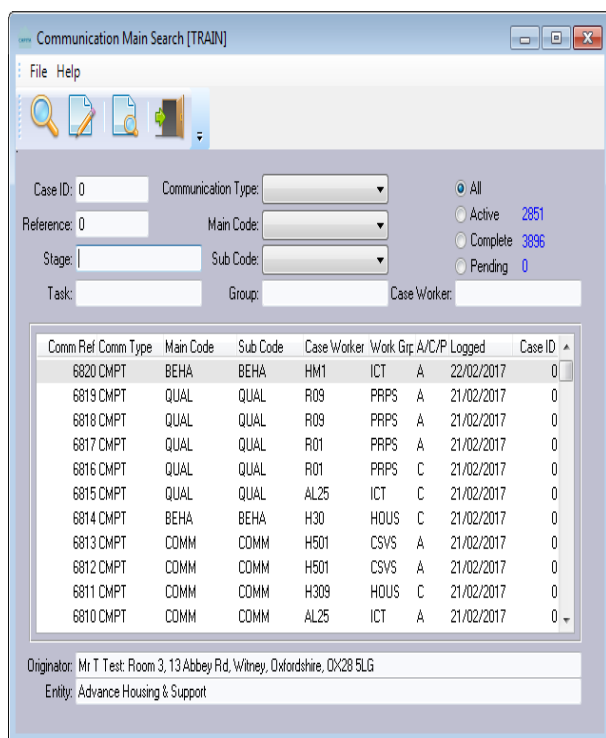
Outlook will then send an email to the Complaint Lead informing them that they have a complaint in OPENHousing that needs investigating. A second email will be sent to all Housing and Regional Administrators. If at this stage you get a message warning you that Outlook is attempting to send an email then please click **Allow**.

2.0 STAGE 2 – MAINTAINING COMPLAINTS



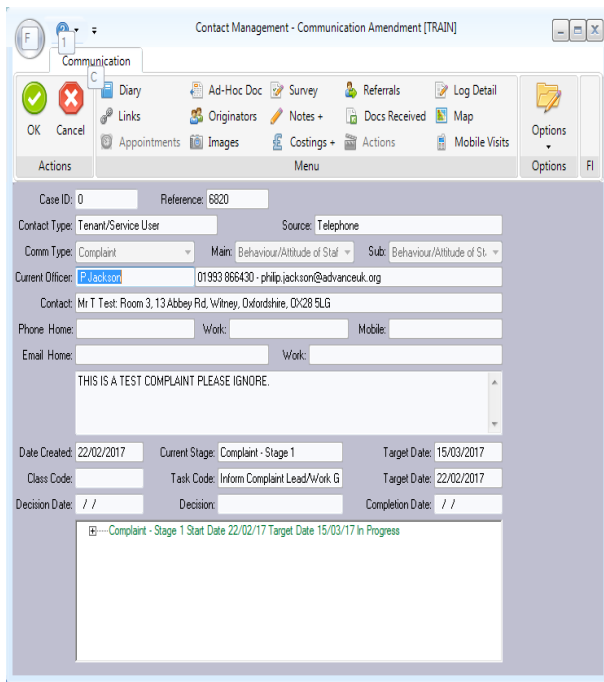
In order to maintain the complaint from the OPENHousing menu bar select:

Contact Management
Searches
Main Search



Select **Search** – this will bring up all complaints logged

Find the complaint, select it and click the **Update Button** to open.



You will be taken to the Contact Management Communication Amendment Screen.

2.1 UPDATING STAGES AND TASKS

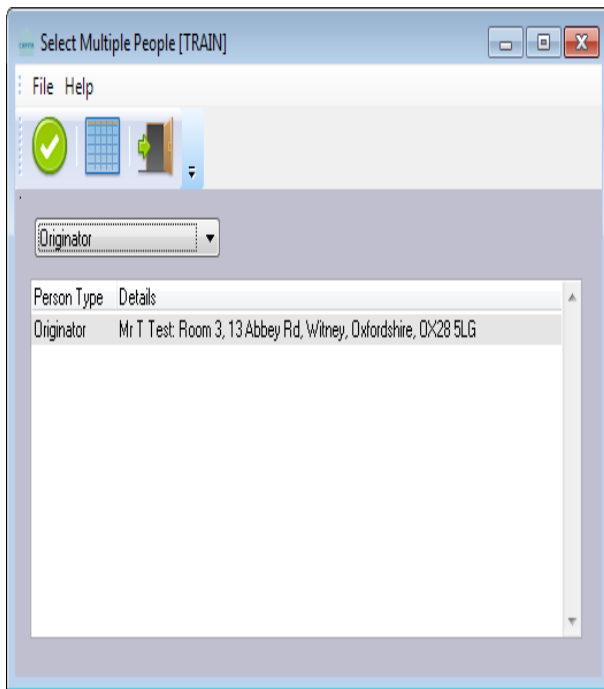
Click on + to open up all stages of the complaint.

The first task which the system has automatically completed as part of the logging process you can see is **Inform Complaint Lead/Work Group Lead of Complaint**. This is an email that is generated by the system to the Complaint Lead/Work Group Lead together with all Housing and Regional Administrators.

Double Click on the next task to open it, which in this example is **Acknowledge Complaint** with customer.

Enter **Actual Start Date** and **Completion Date**.

Select **OK**



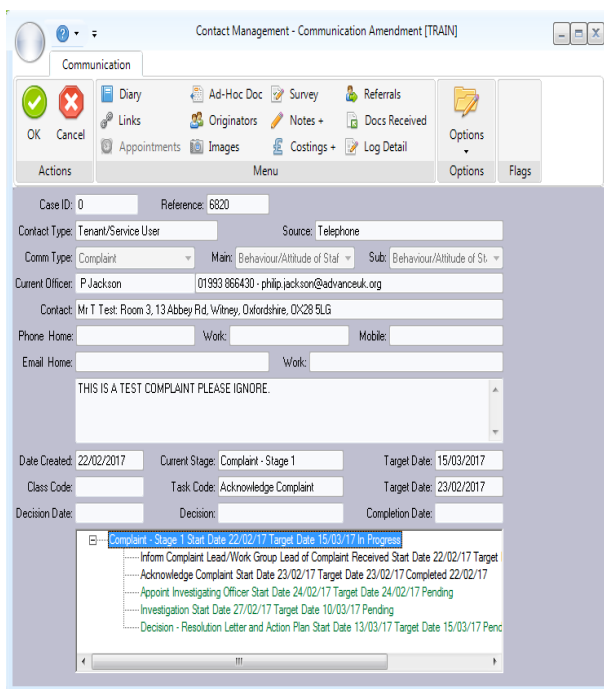
The above screen will popup.

Select the **Originator** to whom you wish the acknowledgement letter to go to.

Select **OK**

This will then generate the letter in Microsoft Word. Please edit the letter as required and save a copy to the drive where you save your documents.

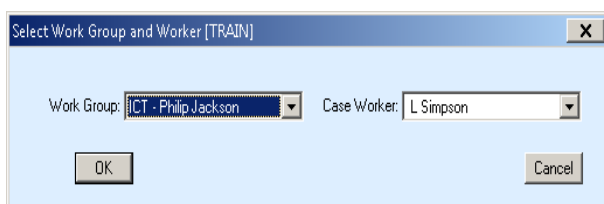
Attach a copy of the letter to the Complaint Case in OPENHousing.



When you then exit out of Microsoft Word you will be taken back to the Contact Management – Communication Amendment screen.

Click on **+** again, you will see the next Task to be completed is **Appoint Investigating Officer**.

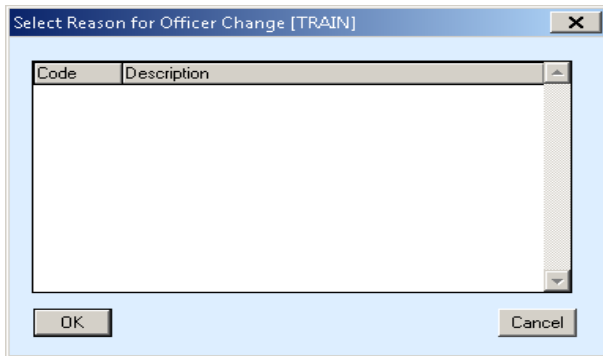
On task **Appoint Investigating Officer**, if this needs to be changed, double click in Current Officer Box and select an alternative officer.



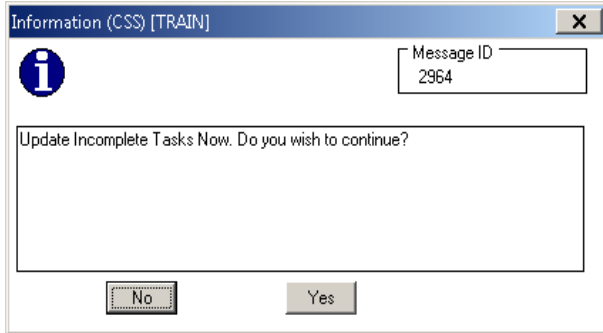
Original **Investigating Officer** will appear.

Select a New Investigating Officer from the **Case Worker** drop down box and

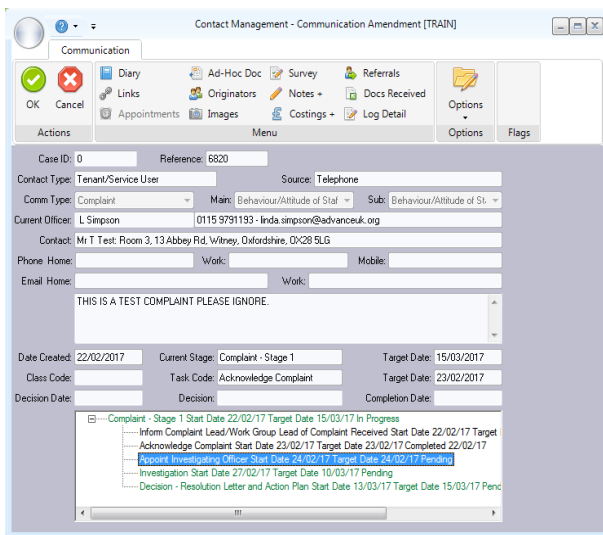
Select **OK**



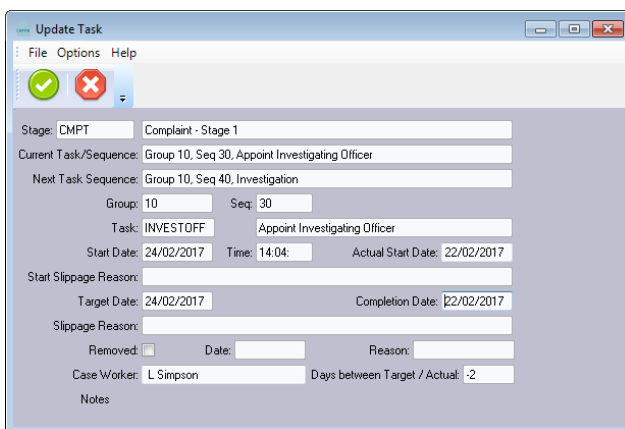
Select **OK**



Select **Yes**



Double Click on the next task to update it, in this example **Appoint Investigating Officer**.



Complete **Actual Start Date** and **Completion Date**

Select **OK**

This will generate an e-mail to the new Investigating Officer.

Remove Task

File Options Help

Stage: CMPT Complaint - Stage 1

Current Task/Sequence: Group 10, Seq 30, Appoint Investigating Officer

Next Task Sequence: Group 10, Seq 40, Investigation

Group: 10 Seq: 30

Task: INVESTOFF Appoint Investigating Officer

Start Date: 24/02/2017 Time: 14:04 Actual Start Date:

Start Slippage Reason:

Target Date: 24/02/2017 Completion Date:

Slippage Reason:

Removed: Date: 22/02/2017 Reason: TASKN/A

Case Worker: L Simpson Days between Target / Actual: 0

Notes

If you do not need to change Investigating Officer you will need to right click on task and select "remove task".

Put a tick in **Removed**, Complete **Date**, double click in **Reason** and select reason code.

Select **OK**

Contact Management - Communication Amendment [TRAIN]

Communication

Case ID: 0 Reference: 6820

Contact Type: Tenant/Service User Source: Telephone

Comm Type: Complaint Main: Behaviour/Attitude of Staff Sub: Behaviour/Attitude of Staff

Current Officer: L Simpson 0115 9791193 - linda.simpson@advancesk.org

Contact: Mr T Test Room 3, 13 Abbey Rd, Witney, Oxfordshire, OX29 5LG

Phone Home: Work: Mobile:

Email Home: Work:

THIS IS A TEST COMPLAINT PLEASE IGNORE.

Date Created: 22/02/2017 Current Stage: Complaint - Stage 1 Target Date: 15/03/2017

Class Code: Task Code: Appoint Investigating Officer Target Date: 24/02/2017

Decision Date: Decision: Completion Date:

Complaint - Stage 1 Start Date 22/02/17 Target Date 15/03/17 In Progress

Inform Complaint Lead/Work Group Lead of Complaint Received Start Date 22/02/17 Target Date 23/02/17 Completed 22/02/17

Acknowledge Complaint Start Date 23/02/17 Target Date 23/02/17 Completed 22/02/17

Appoint Investigating Officer Start Date 24/02/17 Target Date 24/02/17 Removed 22/02/17

Investigation Start Date 27/02/17 Target Date 10/03/17 Pending

Decision - Resolution Letter and Action Plan Start Date 13/03/17 Target Date 15/03/17 Pending

Click on + again and double click next task to open – **Investigation**.

Complete **Actual Start Date** and select **OK** this means you have commenced the investigation and will record the date the investigation commenced.

Update Task

File Options Help

Stage: CMPT Complaint - Stage 1

Current Task/Sequence: Group 10, Seq 40, Investigation

Next Task Sequence: Group 10, Seq 50, Decision - Resolution Letter and Action Plan

Group: 10 Seq: 40

Task: INVEST Investigation

Start Date: 27/02/2017 Time: 14:04 Actual Start Date: 22/02/2017

Start Slippage Reason:

Target Date: 10/03/2017 Completion Date: // //

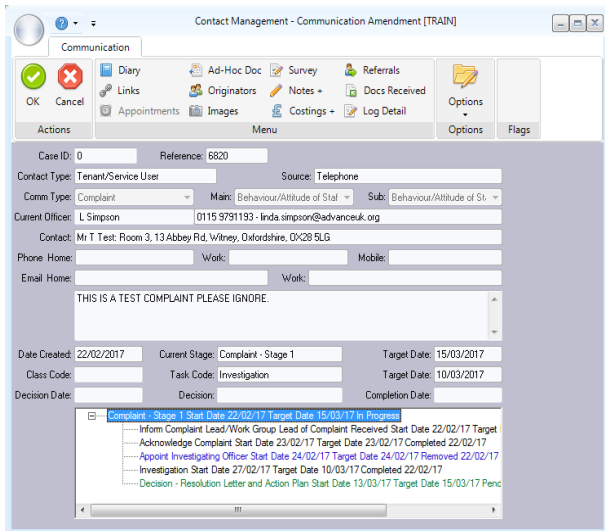
Slippage Reason:

Removed: Date: Reason:

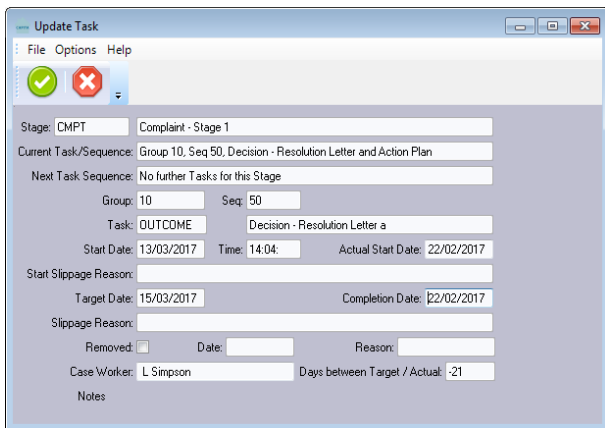
Case Worker: L Simpson Days between Target / Actual: 0

Notes

Once you have completed the investigation go back into this task and enter **Completion Date** and select **OK**. This will then complete this task.



Click on + again and double click next task to open – **Decision**.

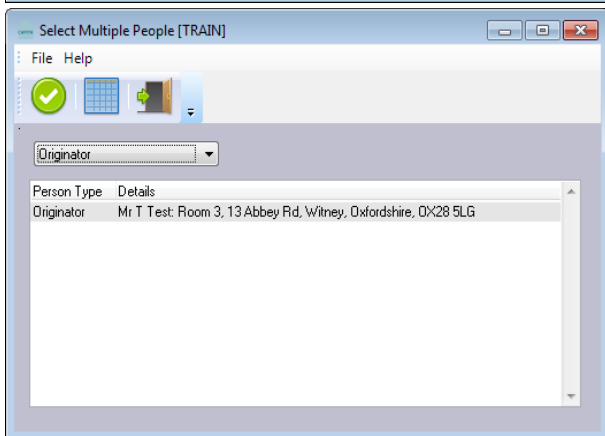


Complete **Actual Start Date** and **Completion Date**.

Select **OK**

This will now generate Decision Letter Template.

Select **OK**



The above screen will popup and all you do here is select the **Originator** to whom you wish the decision letter to go to.

Select **OK**

This will then generate the letter in Microsoft Word. Edit the letter as required and save a copy to the drive where you save your documents.

Attach a copy of the letter to the Complaint Case in OPENHousing.

When you then exit out of Microsoft Word you will be taken back to the Contact Management – Communication Amendment screen.

You will now see that sending the decision letter has triggered the **Pending Complainant Response Stage**. The complainant will now have 10 days in which to respond to confirm whether or not they wish to go to appeal.

Complete **Decision Date**.

Click in **Decision Box**:

Question screen will appear.

Select **No**.

Double Click in **Decision box** again:

Select relevant **Decision** outcome and select **OK**.

DO NOT enter a date in Completion date at this point as the complaint will now go to pending.

3.0 CLOSING COMPLAINT

Case ID: 0 Reference: 6820

Contact Type: Tenant/Service User Source: Telephone

Comm Type: Complaint Main: Behaviour/Attitude of Staff Sub: Behaviour/Attitude of Staff

Current Officer: L Simpson 0115 9791193 - linda.simpson@advanceuk.org

Contact: Mr T Test Room 3, 13 Abbey Rd, Witney, Oxfordshire, OX28 5LG

Phone Home: Work: Mobile:

Email Home: Work:

THIS IS A TEST COMPLAINT PLEASE IGNORE.

Date Created: 22/02/2017 Current Stage: Pending Complainant Response Target Date: 07/03/2017

Class Code: Task Code: Decision - Resolution Letter a Target Date: 15/03/2017

Decision Date: 22/02/2017 Decision: Complaint Upheld Completion Date: 22/02/2017

Complaint - Stage 1 Start Date 22/02/17 Target Date 15/03/17 Completed 22/02/17
Pending Complainant Response Start Date 22/02/17 Target Date 07/03/17 In Progress

If no response is received within the 10 day period, you will need to complete the complaint.

Enter date in **Completion Date**. This will then automatically remove the **Pending Complaint Stage**.

4.0 MOVING COMPLAINT TO APPEAL STAGE

Case ID: 0 Reference: 6920

Contact Type: Tenant/Service User Source: Telephone

Comm Type: Complaint Main: Behaviour/Attitude of Staf Sub: Behaviour/Attitude of St

Current Officer: L Simpson 0115 9791193 - linda.simpson@advancesk.org

Contact: Mr T Test: Room 3, 13 Abbey Rd, Witney, Oxfordshire, OX28 9LG

Phone Home: Work: Mobile:

Email Home: Work:

THIS IS A TEST COMPLAINT PLEASE IGNORE.

Date Created: 22/02/2017 Current Stage: Pending Complainant Respono Target Date: 07/03/2017

Class Code: Task Code: Decision - Resolution Letter a Target Date: 15/03/2017

Decision Date: 22/02/2017 Decision: Complaint Upheld Completion Date: / /

Complaint - Stage 1 Start Date: 22/02/17 Target Date: 15/03/17 Completed: 22/02/17

Pending Complainant Response Start Date: 22/02/17 Target Date: 07/03/17 In Progress

Appeal Received Start Date: 22/02/17 Target Date: 07/03/17 Inactive

Once a complaint decision has been sent to the customer they have 10 days to respond if they disagree. If during the 10 days we receive notification you will need to move the complaint to the appeal stage.

Click on the + by the side Pending Complaint Response, double click on the **Appeal Received**.

Update Task

File Options Help

Stage: PENDING Pending Complainant Response

Current Task/Sequence: Group 20, Seq 10, Appeal Received

Next Task Sequence: No further Tasks for this Stage

Group: 20 Seq: 10

Task: APPEALRCD Appeal Received

Start Date: 22/02/2017 Time: 14:18 Actual Start Date: 22/02/2017

Start Slippage Reason:

Target Date: 07/03/2017 Completion Date:

Slippage Reason:

Removed: Date: Reason:

Case Worker: L Simpson Days between Target / Actual: 0

Notes

Complete **Actual Start Date** and **Completion Date**.

Select **OK**

This will now open the **Appeal Stage**.

You will now need to change the **Current Officer** to the **Case Worker** who will be dealing with the appeal.

Double Click in **Current Officer** box.

Original **Investigating Officer** will appear.

Select a new **Investigating Officer** from the drop down box and Select **OK**.

Select **Yes**.

Case ID: 0 Reference: 6920

Contact Type: Tenant/Service User Source: Telephone

Comm Type: Complaint Main: Behaviour/Attitude of Staff Sub: Behaviour/Attitude of Staff

Current Officer: P Jackson 01993 866430 - philip.jackson@advanceuk.org

Contact: Mr T Test Room 3, 13 Abbey Rd, Witney, Oxfordshire, OX28 5LG

Phone Home: Work: Mobile:

Email Home: Work:

THIS IS A TEST COMPLAINT PLEASE IGNORE.

Date Created: 22/02/2017 Current Stage: Complaints Review Panel - App Target Date: 03/04/2017

Class Code: Task Code: Appeal Received Target Date: 07/03/2017

Decision Date: 22/02/2017 Decision: Complaint Upheld Completion Date:

Complaint - Stage 1 Start Date 22/02/17 Target Date 15/03/17 Completed 22/02/17

Pending Complainant Response Start Date 22/02/17 Target Date 07/03/17 Completed 22/02/17

Complaints Review Panel - Appeal Stage 2 Start Date 22/02/17 Target Date 03/04/17 In Progress

Click on + by **Complaints Review Panel – Appeal Stage**.

Update Task

File Options Help

Stage: APPEAL2 Complaints Review Panel - Appeal Stage 2

Current Task/Sequence: Group 30, Seq 10, Appoint Investigating Officer

Next Task Sequence: Group 30, Seq 20, Acknowledge Appeal Letter with Complainant

Group: 30 Seq: 10

Task: INVESTOFF1 Appoint Investigating Officer

Start Date: 22/02/2017 Time: 14:22 Actual Start Date: 7/7

Start Slippage Reason:

Target Date: 22/02/2017 Completion Date:

Slippage Reason:

Removed: Date: Reason:

Case Worker: P Jackson Days between Target / Actual: 0

Notes

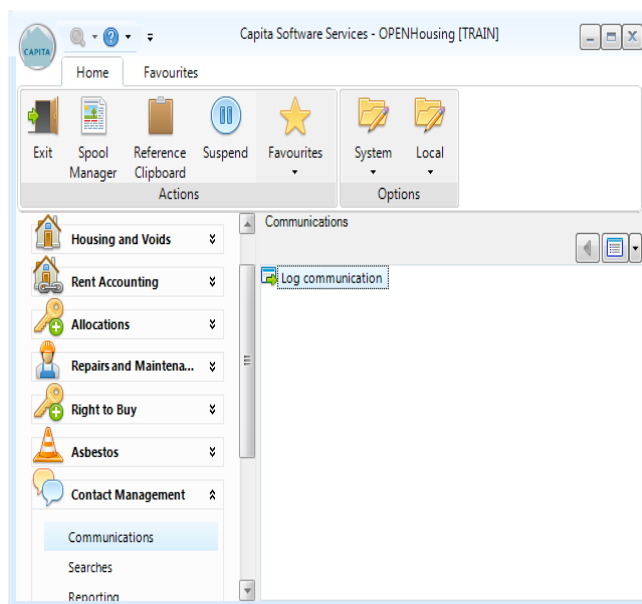
Double click on **Appoint Investigating Officer** to open task.

Complete **Actual Start Date** and **Completion Date**. To change Case Worker double click in box and select Case Worker who will be dealing with the Appeal.

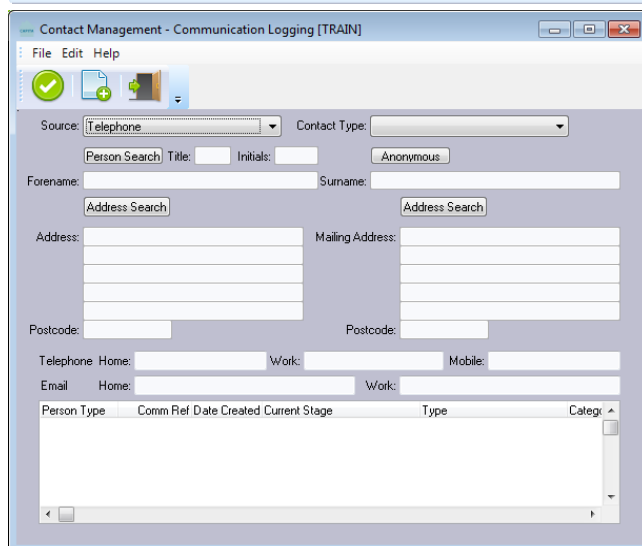
This sends an e-mail to the Case Worker to let them know a case has been re-assigned to them.

It is then their responsibility to complete the rest of the tasks in the Appeal.

5.0 COMPLIMENTS



We log compliments in OPENHousing in the same way as complaints. From the OPENHousing menu bar select:
Estates
Log Communication



From the **Source** dropdown select the source of the compliment i.e. how it was received.

From the **Contact Type** dropdown select contact type from whom the compliment was received.

As this is identified as a Tenant/Service User you can then go to Person Search and search for the customer.

Select **OK**

Reference 0 [TRAIN]

Communication Maintenance

Person: Mr T Test Room 3, 13 Abbey Rd, Witney, Oxfordshire, OX28 5LG

Details: THIS IS A TRAINING COMPLIMENT, PLEASE IGNORE

Communication Type: Compliments

Main Code: Compliments Sub Code: Compliments

Date Logged: 22/02/2017 + Time: 1436 Incident Date: / / + Time:

Work Group: Case Worker:

Subject: Tenancy Reference: 194901

Description: Mr T Test Room 3, 13 Abbey Rd, Witney, Oxfordshire, OX28 5LG

Address: Room 3, 13 Abbey Rd, Witney, Oxfordshire, OX28 5LG

Postcode: OX28 5LG

Area: H21 Sub Area: LD

Person Type	Comm Ref	Date Created	Current Stage	Type	Category
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Enter the details of the compliment in the **Details** box.

Communication Type – select Compliments

Main Code – select Compliments

Sub Code – select Compliments

Date logged will automatically populate.

Incident Date enter the date the Compliment was received.

Work Group – select from the drop down list the Work Group the Compliment relates to.

Case Worker – from the dropdown list select the officer for the Department for which the compliment relates to.

Subject – select from the dropdown the subject of the compliment.

Reference – if the compliment relates to a member of staff for example you could enter the staff number or the name of the individual.

Select **OK**

Contact Management - Communication Amendment [TRAIN]

Communication

Case ID: 0 Reference: 6821

Contact Type: Tenant/Service User Source: Telephone

Comm Type: Compliments Main: Compliments Sub: Compliments

Current Officer: L Simpson 0115 9791193 - linda.simpson@advanceuk.org

Contact: Mr T Test: Room 3, 13 Abbey Rd, Witney, Oxfordshire, OX28 5LG

Phone Home: Work: Mobile:

Email Home: Work:

Details: THIS IS A TRAINING COMPLIMENT, PLEASE IGNORE.

Date Created: 22/02/2017 Current Stage: Compliment Acknowledgment Target Date: 22/02/2017

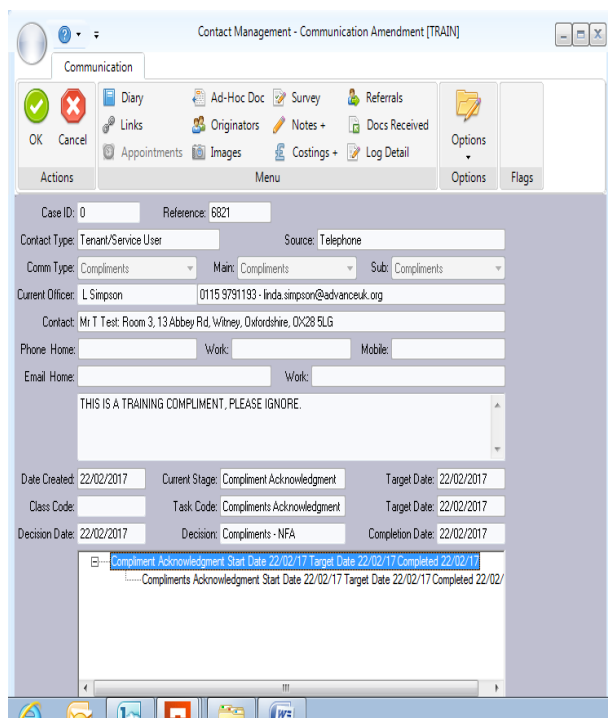
Class Code: Task Code: Compliments Acknowledgment Target Date: 22/02/2017

Decision Date: 22/02/2017 Decision: Compliments - NFA Completion Date: 22/02/2017

Compliment Acknowledgment Start Date 22/02/17 Target Date 22/02/17 Completed 22/02/17

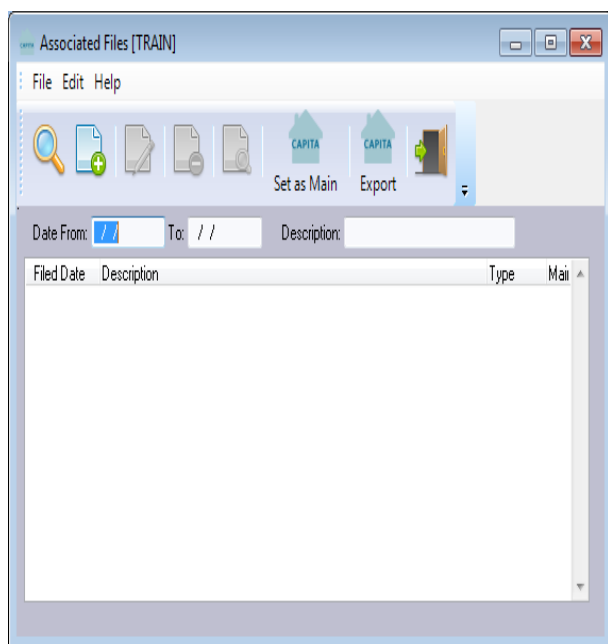
When you go back in to review the compliment you will see the **Decision Date** and **Decision Outcome** are automatically completed, this is because there is no action to take, therefore the compliment automatically closes down.

6.0 ATTACHING IMAGES



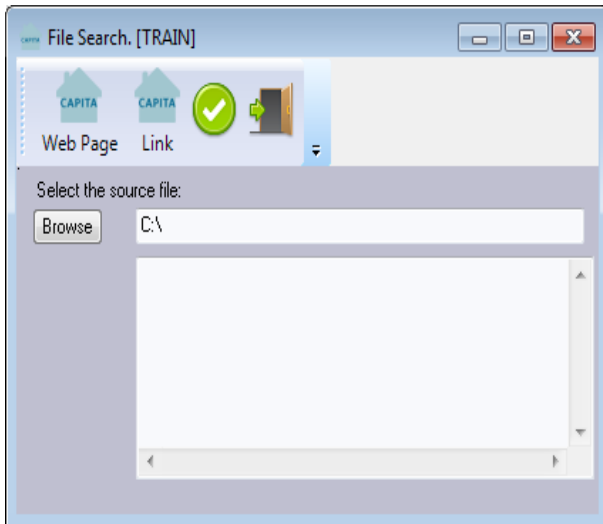
When attaching documents to a Contact Management record from the following screen.

Select the **Images Button**

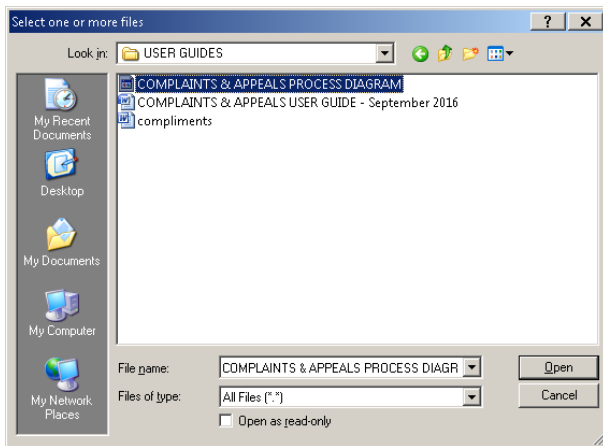


You will be taken into the **Associated Files** screen.

Select **Create**

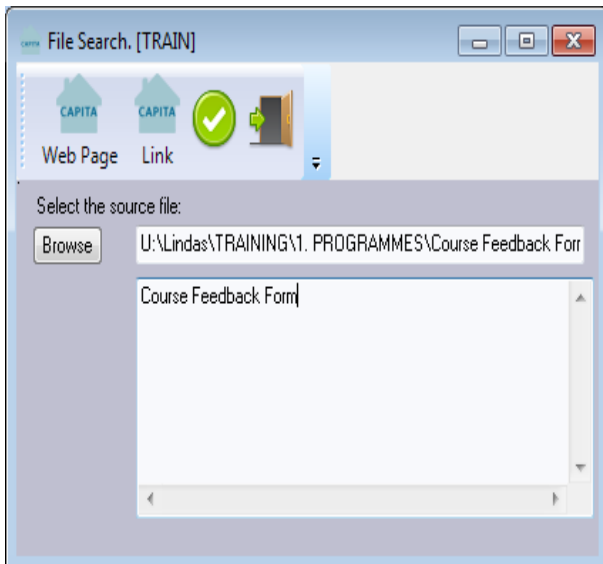


Select **Browse** to navigate to document which you wish to attach.



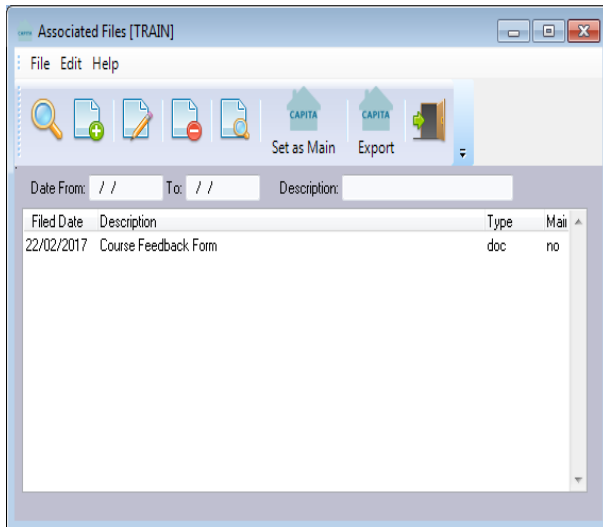
Select document

Select **Open**



Enter in the free text box a description for the document.

Select **Copy**



You will now see the document has been attached with the **Filed Date** and **Description**.

Select **Exit**

7.0 DIARY MAINTENANCE

Communication

Case ID: 0 Reference: 6821

Contact Type: Tenant/Service User Source: Telephone

Comm Type: Compliments Main: Compliments Sub: Compliments

Current Officer: L Simpson 0115 9731193 - linda.simpson@advantageuk.org

Contact: Mr T Test, Room 3, 13 Abbey Rd, Witney, Oxfordshire, OX28 9LG

Phone Home: Work: Mobile:

Email Home: Work:

THIS IS A TRAINING COMPLIMENT, PLEASE IGNORE.

Date Created: 22/02/2017 Current Stage: Compliment Acknowledgment Target Date: 22/02/2017

Class Code: Task Code: Compliments Acknowledgment Target Date: 22/02/2017

Decision Date: 22/02/2017 Decision: Compliments - NFA Completion Date: 22/02/2017

Compliment Acknowledgment Start Date 22/02/17 Target Date 22/02/17 Completed 22/02/17
 Compliments Acknowledgment Start Date 22/02/17 Target Date 22/02/17 Completed 22/02/17

It is really important that you add notes within **Diary Maintenance** to record any additional actions or conversations.

From the Contact Management Communication Amendment Screen select **Diary**.

Diary Maintenance [TRAIN]

File Edit Help

Ref: 6821 Mr T Test

Contact Numbers

Entered Date	Reference	Type	Entry Text
22/02/2017	Estates	TEXT	Course Feedback Form Created
22/02/2017	Estates	ESTATES	Completed Communication 6821 Compliments - NFA
22/02/2017	Estates	ESTATES	Completed Stage Compliment Acknowledgment
22/02/2017	Estates	ESTATES	Completed Task: Compliments Acknowledgment
22/02/2017	Estates	ESTATES	Trigger 1/10/1 Action No Action Required

In the **Diary Maintenance** screen you will see other tasks that have been actioned as part of the complaints process. However, you can add additional free text entries, to do this select **Create**.

Create Diary [TRAIN]

Reference: 6645 Reference Type: Estates

Entry Type: Text Diary Status: Normal

Date: 28/09/2016 Time: 18:38:35

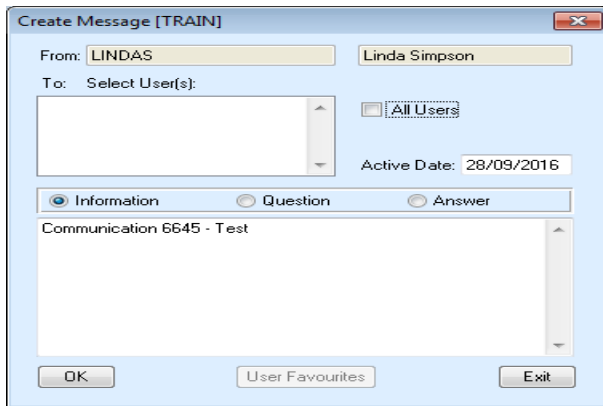
OK Audit Create Send Cancel

Enter the text you wish to add in the **white box**.

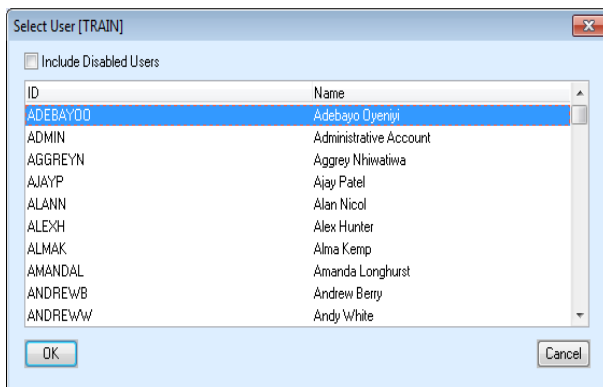
If you wish to send a message within OPENHousing select the **Send** button.

Enter the text you wish to add in the **white box**.

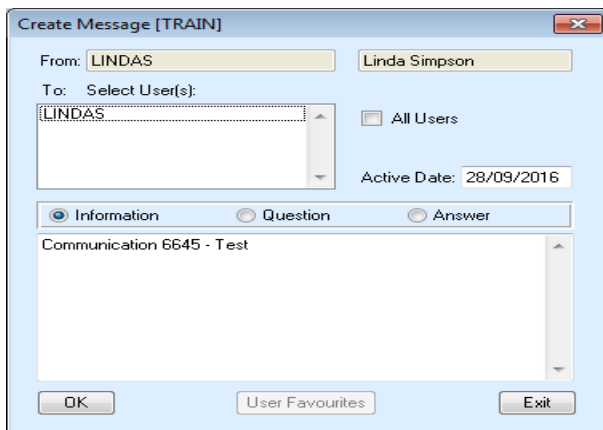
If you wish to send a message within OPENHousing select the **Send** button.



Double Click in the **Select Users** box.



Select the user you wish to send the message to and select **OK**.



You can then select the **Information**, **Question** or **Answer** radial.

Select **OK**

The message will be sent to the user you have selected which will pop-up within OPENHousing when they next log into the system.

Reference: 6645 Reference Type: Estates

Entry Type: Text Diary Status: Normal

Date: 28/09/2016 Time: 18:38:35

Test

OK Audit Create Send Cancel

Select **OK**

Diary Maintenance [TRAIN]

File Edit Help

Ref: 6821 Mr T Test

Entered Date	Reference	Type	Entry Text
22/02/2017	Estates	TEXT	TEST
22/02/2017	Estates	ESTATES	Course Feedback Form Created
22/02/2017	Estates	ESTATES	Completed Communication 6821 Compliments - NFA
22/02/2017	Estates	ESTATES	Completed Stage Compliment Acknowledgment
22/02/2017	Estates	ESTATES	Completed Task Compliments Acknowledgment
22/02/2017	Estates	ESTATES	Trigger 1/10/1 Action No Action Required

You will see the text diary entry in the **Diary Maintenance** screen.

Select **Exit**