New Client User Guide – Complaint Management

Step 1 – Creating the Project

1. Client will click on Resources tab
2. Select "Links"
3. Select "Complaint Management"

Links

These links can be dragged to your desktop and will open the appropriate form when double clicked.

Link	Description
Complaint Management	Please use this form to begin the complaint resolution process. To begin at a minimum you will need to know: • The date of the complaint • How it was received • The type of complaint • The Account Number • The Primary Member Name • The identity of the person handling the complaint • Whether the resolution of the complaint requires management approval • The name of the manager required to approve the resolution Once you have completed this information the complaint will be created and you will need to launch the Complaint Project to do such things as change due dates, reassign tasks and provide special instructions. All tasks will be routed to the specified person(s).

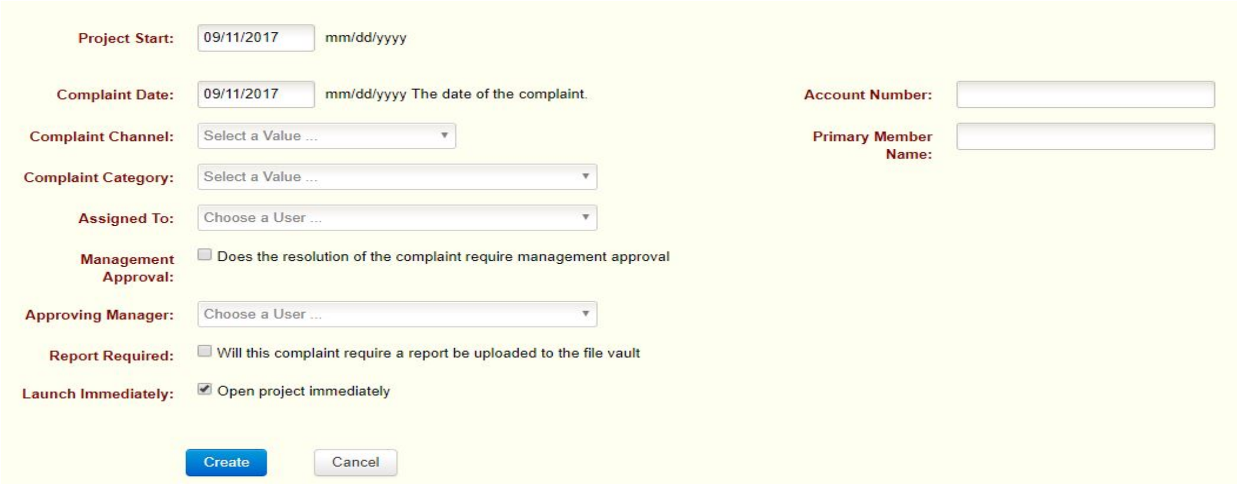
4. Explain to the client that the link to Complaint Management can be dragged onto the client's desktop for easy access.

Create Complaint Management Project For

Instructions:
Please use this form to begin the complaint resolution process. To begin at a minimum you will need to know:

- The date of the complaint
- How it was received
- The type of complaint
- The Account Number
- The Primary Member Name
- The identity of the person handling the complaint
- Whether the resolution of the complaint requires management approval
- The name of the manager required to approve the resolution

Once you have completed this information the complaint will be created and you will need to launch the Complaint Project to do such things as change due dates, reassign tasks and provide special instructions. All tasks will be routed to the specified person(s).



4. Complete Project Start and Complaint Dates
5. Complaint Channel – Select a value
    - Explain that this is the section on how the complaint was originated
    - In-person, call center, email, regular mail, fax, or other
6. Complaint Category- Select a value

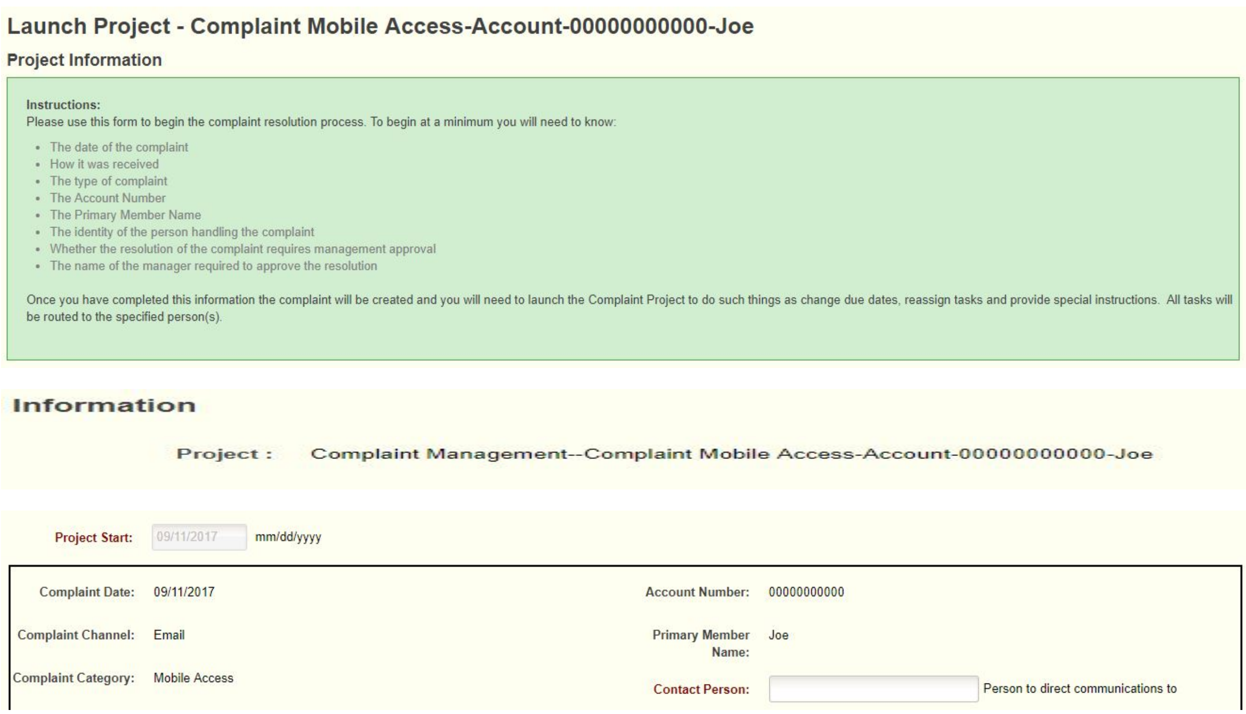
    Explain that this is the section on the type of complaint

    - Advertising, bill payment, credit issue, employee behavior, loan issues, mobile, mortgage, online use, return check, website, etc.
7. Complete Client Account Number
8. Complete Primary Member Name
9. Assigned To
    - Choose who in your organization
10. Management Approval – Does this need approval?
11. Approving Manager
    - Choose who in your organization
12. Report Required
    - Do you want this complaint to be uploaded to the file vault?
13. Create Report

Step 2 – Projects

1. Client will complete project information

   - Information regarding brief description of complaint
   - Due date for each task (Investigate and Formulate Plan, Resolution, Resolved, Close)
   - Any tasks or special instructions that need to be assigned
   -



4. Client will click the “launch” button

5. A green bar will be displayed at the top of the webpage stating that the task has been saved

Step 3 – Notifications

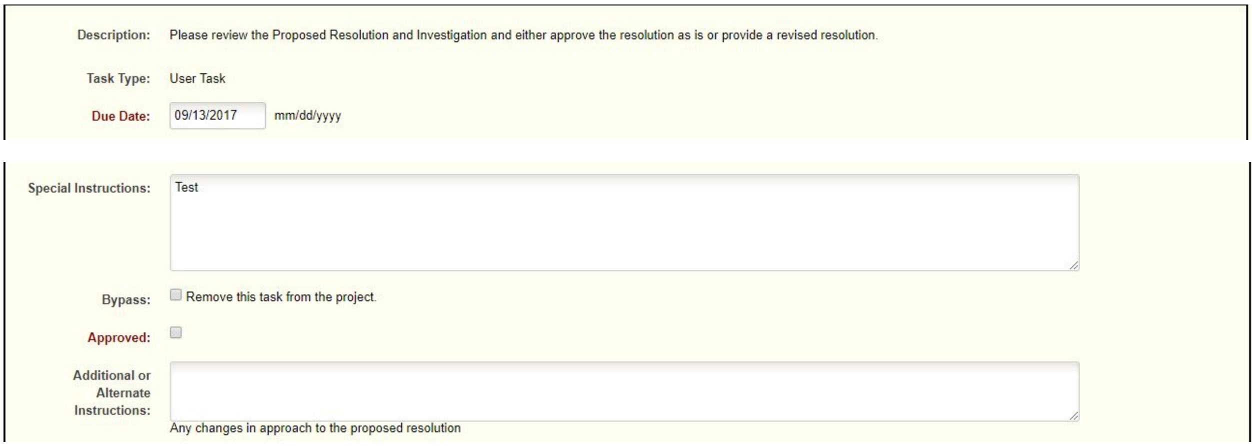
1. Client will click on "Notifications" tab at the top of the screen
2. Client will see "Pending" notification(s) for the complaint
3. Select notification to be completed
4. Client will be required to complete questions

5. Select "Complete?" box
6. Select "Update Task"
7. A green bar will be displayed at the top of the webpage stating that the task has been saved

Step 4 – Projects to be completed

1. Client will click on "Projects'
2. Client will choose "List" from the dropdown menu
3. Client will choose the project for the Complaint Management and click on the "view" button

4. Client will need to use this form to begin the Complain Resolution process.
    - Client will have the options to bypass (remove this task from the project) or approve any tasks.



Description: Please review the Proposed Resolution and Investigation and either approve the resolution as is or provide a revised resolution.

Task Type: User Task

Due Date: 09/13/2017 mm/dd/yyyy

Special Instructions: Test

Bypass: Remove this task from the project.

Approved:

Additional or Alternate Instructions:

Any changes in approach to the proposed resolution

5. After the client has completed all fields they will click the "update" button.

<u>Step 5 – Reports</u>

1. Client will click on "Project"
2. From the dropdown menu, client will choose "Lists"
3. Client will choose Complaint Management account and click on "report"

view report cancel

4. A report will form in a "pdf" format for the client's review
    - The report will consist of a title page:

AFFIRMX COMPLAINT MANAGEMENT
COMPLAINT MOBILE ACCESS-ACCOUNT-000000000000-JOE

- Project Information:

PROJECT INFORMATION 3
INSTRUCTIONS 3
ATTRIBUTES...3
A. TASKS...5
1. Investigate Complaint and Formulate Resolution Plan.................................5
2. Management Resolution Approval.................................5
3. Resolve Complaint and Record Disposition 6
4. Close.................................6

- Project Instruction:

PROJECT INFORMATION

INSTRUCTIONS

Please use this form to begin the complaint resolution process. To begin at a minimum you will need to know:

- The date of the complaint
- How it was received
- The type of complaint
- The Account Number
- The Primary Member Name
- The identity of the person handling the complaint
- Whether the resolution of the complaint requires management approval
- The name of the manager required to approve the resolution

Once you have completed this information the complaint will be created and you will need to launch the Complaint Project to do such things as change due dates, reassign tasks and provide special instructions. All tasks will be routed to the specified person(s).

Start Date	**September 11, 2017**
Complaint Date	**09/11/2017**
Complaint Channel	**Email**
Complaint Category	**Mobile Access**
Account Number	**0000000000000**
Primary Member Name	**Joe**
Contact Person	**Tim**

Step 6 – Completed Complaint

1. Client will select "Notifications"
2. Client will select the pending notification
3. Client will add any additional information if needed to the resolution
4. Client will select "Complete" box when the complaint has been resolved and then select "Update Task"

5. A green bar will be displayed at the top of the webpage stating that the task has been saved

Step 7 – Status of Complaint

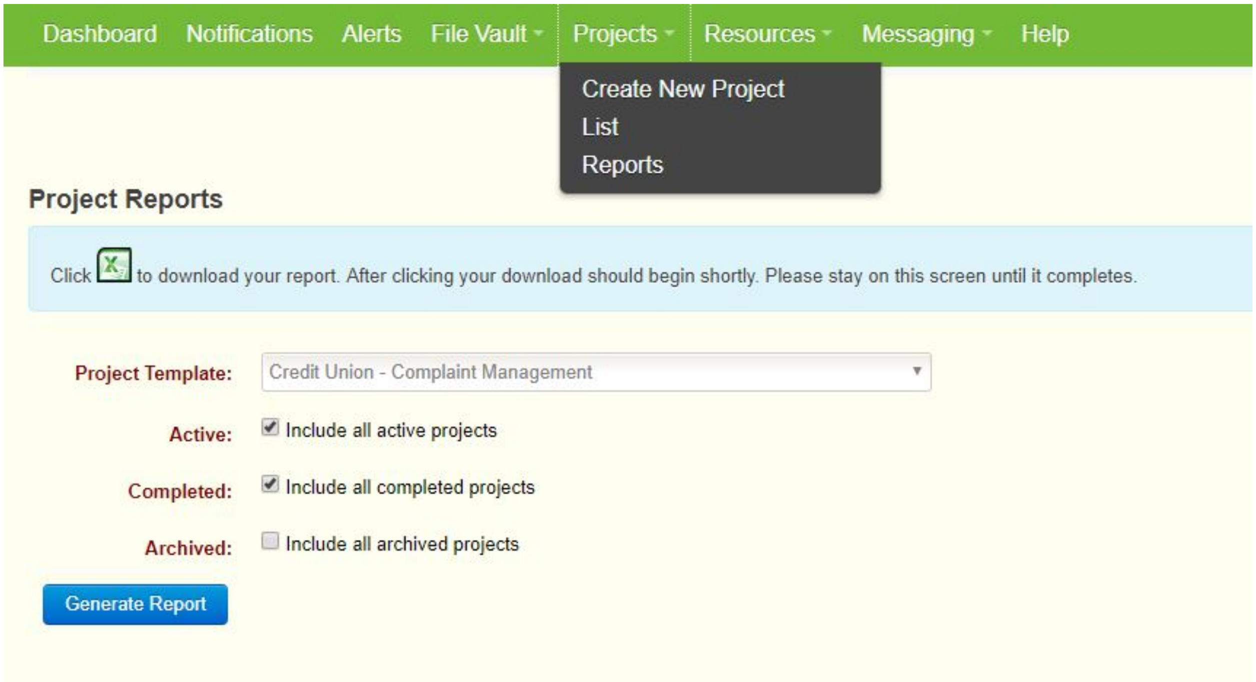
1. Client will be able to check to see if the complaint is resolved by clicking on the "Projects" tab and selecting "List"

2. Once the complaint is completed, the status will show "completed" 

Step 8 – List of all Client Complaints

1. If a client would like to access all complaints, they can access an excel spreadsheet.

2. Client will select “Projects”
3. Choose “Reports” from the dropdown menu
4. Client will choose” Credit Union – Complaint Management” from Project Template
5. Select “Generate Report”



6. Click on the excel icon  to open the report.