

## Interaction Handling Procedure

When creating a CRM, you can change the Interaction Handler, which is the field shown in red below when we need to be alerted to anything that needs further looked into in the morning:

### INT37641

#### Enquirer Details

Fully Anonymous

Enquirer Peter Livingstone

Enquirer Country England

#### Case Details

Case Reference CA45011 (Robert Livingstone, 2021-01-28)

Community Response

COVID-19 Related

#### Interaction Details

Interaction handler Elliot Hunter

Interaction Date 01/02/2021 09:15:00

Interaction Method Phone Call

Direction Inbound

Call State Active

Duration (mins) 25

Out Of Remit

If you click on the Interaction Handler field, you will then be presented with the following dropdown menu of the handlers on the system:

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#### Interaction Details

Interaction handler Elliot Hunter

Interaction Date

Interaction Method

Direction

Call State

Duration (mins)

Out Of Remit

Dropdown menu of handlers:

- Abbie Dacruz
- ABC Smith
- Admin User
- Allison Bates
- Andy Jackson
- Angie Greenaway-Samuel
- Barry Smith
- Search More...
- Create and Edit...

This is a list of every Interaction Handler on the System. You can then use the “Search More” option to show the full list, like the below. For example, if you choose Angie from the list below, this will then fill the Interaction Handler field with Angie’s name:

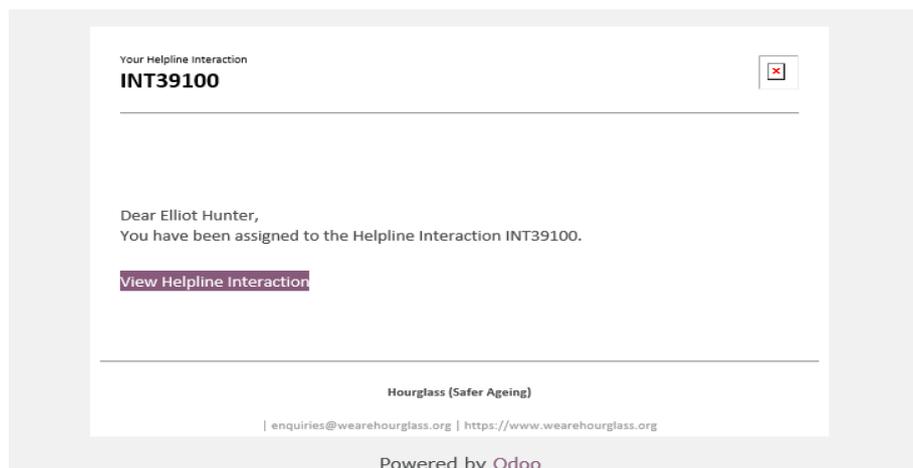
Search: Interaction handler

Quick search: A Search... Filters Group By Favourites 1-74 / 74

Name	Login	Frontline Operator?	Helpline Team Access	Default Team for Ne...	Language	Latest authentication
Abbie Dacruz	Abbie.Dacruz@conne...	<input checked="" type="checkbox"/>	Information Officers	Information Officers	English (UK)	09/02/2022 13:12:05
ABC Smith	abc.smith@wearehou...	<input checked="" type="checkbox"/>	Information Officers	Information Officers	English (UK)	
Admin User	AdminUser@gmail.com	<input checked="" type="checkbox"/>	Information Officers	Information Officers	English (UK)	
Allison Bates	allisonbates@weareh...	<input checked="" type="checkbox"/>	Information Officers	Information Officers	English (UK)	
Andy Jackson	andy.song@talktalk.net	<input checked="" type="checkbox"/>	Information Officers	Information Officers	English (UK)	25/11/2020 11:23:28
Angie Greenaway-Sa...	angiegreenaway-sam...	<input checked="" type="checkbox"/>	Information Officers	Information Officers	English (UK)	22/02/2022 14:51:09
Barry Smith	barrysmith596@gmail...	<input checked="" type="checkbox"/>	Information Officers	Information Officers	English (UK)	03/01/2022 17:16:12
Brian Rapley	brianrapley@weareho...	<input checked="" type="checkbox"/>	CR Team IDVA Team Information Officers	Information Officers	English (UK)	07/01/2021 13:04:24
(CA) Adam Walters	Adam.Walters2@con...	<input checked="" type="checkbox"/>	Information Officers	Information Officers	English (UK)	
(CA) Alison Moore	alison.moore@conne...	<input checked="" type="checkbox"/>	Information Officers	Information Officers	English (UK)	01/03/2022 09:35:11
(CA) Andrew Jones	andrew.jones@conne...	<input checked="" type="checkbox"/>	Information Officers	Information Officers	English (UK)	
(CA) Emma Moore	Emma.Moore@conne...	<input checked="" type="checkbox"/>	Information Officers	Information Officers	English (UK)	
(CA) Erin Howitt	erin.howitt@connecta...	<input checked="" type="checkbox"/>	Information Officers	Information Officers	English (UK)	
(CA) Heidi Steadman	heidi.steadman@con...	<input checked="" type="checkbox"/>	Information Officers	Information Officers	English (UK)	
(CA) Jason Baker	jason.baker@connect...	<input checked="" type="checkbox"/>	Information Officers	Information Officers	English (UK)	
(CA) John Myhill	john.myhill@connecta...	<input checked="" type="checkbox"/>	Information Officers	Information Officers	English (UK)	
(CA) Jonathan Beare	jonathan.beare@con...	<input checked="" type="checkbox"/>	Information Officers	Information Officers	English (UK)	28/02/2022 13:10:17

Create Cancel

You can then save the Interaction in the normal way, using the Edit and Save buttons. When you enter a new CRM, your name will appear by default as the Interaction Handler. If you change the Interaction Handler to Angie, then Angie will receive an e-mail to alert her to the CRM that she has been assigned to, which will look similar to the below:



Using this method, you can then re-assign the CRM to any number of Interaction Handlers, and each one will receive a ping like the above. This will alert us to any CRM records that we need to check in the morning.

- Call Back: When writing notes, you can add into the Notes section that a Call Back is required.
- Emergency Interventions: Using the After-Calls Action tab you can tick the boxes to indicate any Emergency Intervention that has taken place.
- Complaints: If we receive any complaints, for example from previous callers, you can select “Complaint About Hourglass Response” from the Out of Remit reasons list, and then once again assign it to Elliot Hunter, Angie Greenaway-Samuel and Maggie Evans as Interaction Handlers. We will then be able to see this in the morning when we log in.