

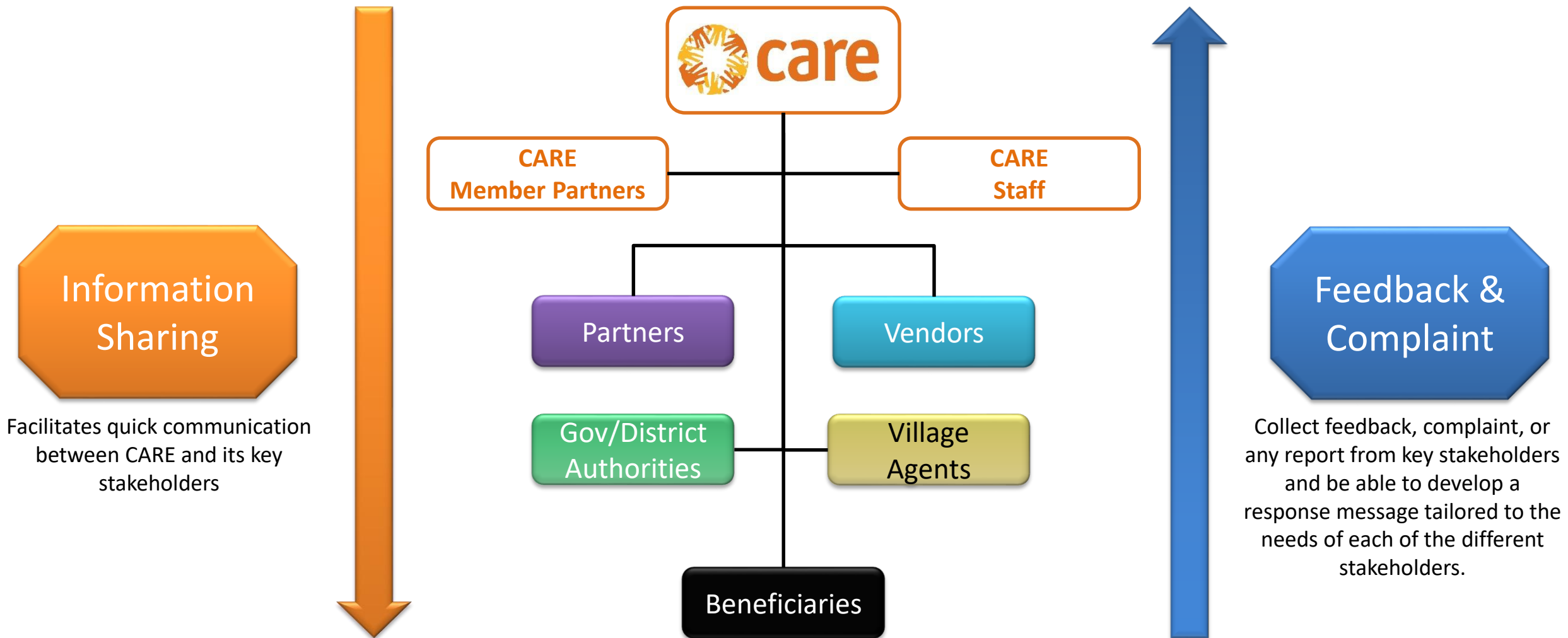


CARE4U Platform Training

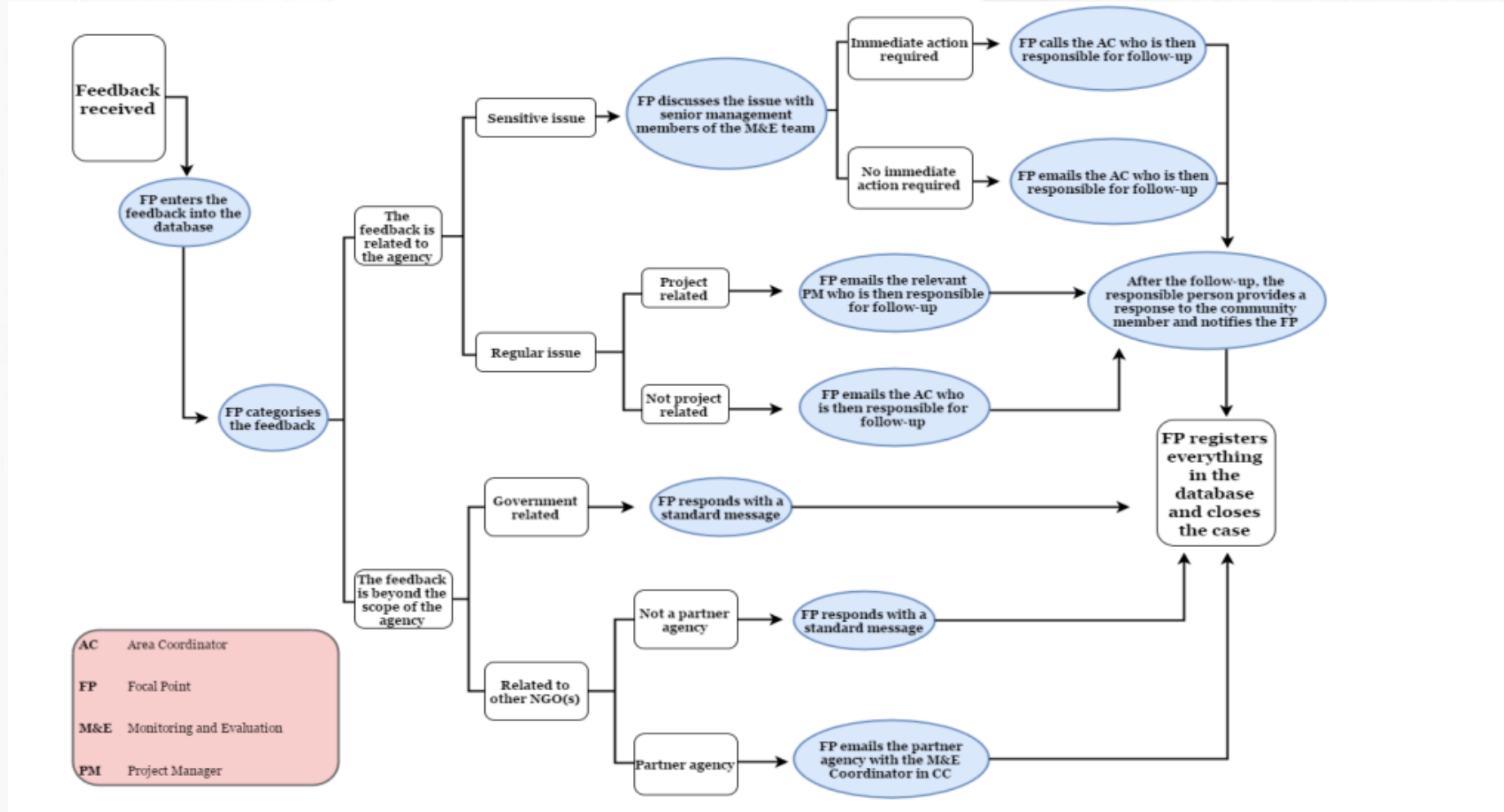
Focus: Feedback & Complaint Handling



Platform which allows CARE to share information and collect feedback & complaint



Before we get started, let's review a sample flow chart



Get started



On the navigation bar, choose **Feedback & Complaint > Feedback Cases**, Choose **“New Feedback Case”**

The screenshot shows the care4u navigation bar. The 'Feedback & Complaint' menu is expanded, showing options: 'Info Sharing', 'Feedback & Complaint', 'STAKEHOLDERS', and 'FEEDBACK'. Under 'FEEDBACK', 'Feedback Cases' is highlighted with a red box. Other options include 'Stakeholder Groups', 'Individuals', 'Activities', and 'Feedback Queues'.

The screenshot shows the care4u 'All Feedback Cases' page. The '+ NEW FEEDBACK CASE' button is highlighted with a red box. Below the navigation bar, there are options for 'PHONE SUPPORT', 'DELETE', and 'RUN REPORT'. The main content area shows a list of feedback cases with columns for 'Feedback Case Title' and 'Feedback Case Number'.

Feedback Case Title ↑	Feedback Case Number
Complaint received from CARE4U Feedback Kiosk	CAS-00091-V6V6H3
Complaint received from CARE4U website	CAS-00088-L1T7R9

Create a Feedback Case from Email/SMS




The screenshot displays the care4u CRM interface. At the top, there is a navigation bar with the care4u logo (powered by VOVACARE), a menu icon, and navigation options: 'Info Sharing', 'Activities', and a dropdown for 'test 231 CRM:00090...'. The user's name 'SANDBO...' is visible on the right. Below the navigation bar is a toolbar with actions: 'REPLY', 'REPLY ALL', 'FORWARD', 'SAVE', 'CONVERT TO', 'DELETE', 'EMAIL A LINK', 'FORM', and 'ADD TO FEEDBACK QUEUES'. The 'CONVERT TO' dropdown menu is open, showing three options: 'To Opportunity', 'To Feedback Case', and 'To Lead'. The 'To Feedback Case' option is highlighted and circled in red. Below the toolbar, the message content is shown as 'EMAIL/SMS' and 'test 231 CRM:000900'. A yellow warning banner states: 'This message has not yet been submitted for delivery. For more information, see help.' At the bottom, the email header shows 'From: CARE4U Platform' and 'To: John Test User'.

Create a Feedback Case from Web



care4u.vovacare.org/send-feedback/

Send your feedback or complaint by SMS to: **0787-953-853** (toll-free)

 [Home](#) | [Member Login](#) | [Feedback/Complaint Form](#)

SEND YOUR FEEDBACK/COMPLAINT TO CARE RWANDA

To support better programming and improve our accountability to those we aim to assist, CARE Rwanda needs effective, safe and accessible feedback and complaint mechanisms. Every member of the CARE Rwanda community in which we work, whether they are a beneficiary of CARE's programs or not, has a right to give their feedback and make a complaint about CARE. Please use the form below to submit your feedback or complaint.

FEEDBACK/COMPLAINT DETAILS

Select the type of feedback you would like to submit: **(required)**

--Select--

Description of feedback **(required)**

Please describe as detailed as possible date, place, causes, what happened, who were involved and the consequences where applicable

Create a new Feedback/Complaint Case



1. Enter a title for the Feedback or Complaint
2. Select a Stakeholder/Individual (type the name of the person who is issuing the feedback/complaint)

SAVE & CLOSE SAVE & ROUTE + NEW SAVE EDIT

FEEDBACK CASE ▾

New Feedback Case

▶ Categorize Case (Active) ▶ Identify Case Owner

Find Stakeholder * [click to enter](#) Prior

Related to [click to enter](#)

Subject [click to enter](#)

Summary

FEEDBACK/COMPLAINT CASE DETAILS

Feedback Title *

Stakeholder/Indiv * --

Subject --

Source --

Location/Address --

DESCRIPTION

--

3. if a record for the Stakeholder/Indiv does not exist, choose **New** to create a new Individual record.

Before you create a new Individual record, check to see if it already in the system

4. Select the Subject related to this Feedback/Complaint

5. Select the source of this feedback/complaint

6. If you know the location/address related to this case, enter it in the Location/Address field

7. Type a detailed description of the feedback/complaint case in the Description field

Specify Feedback/Complaint Subject & Source



You can select a Subject related to a Feedback/Complaint, as well as specifying the source of the

- A10-General
- Clean Water
- Disaster Relief
 - Refugees
- Economic Development
 - Market Access
 - Microfinance
- Education
 - Girl's Education
 - Youth Empowerment
- Maternal Health
- Poverty
 - Child Poverty
 - Poverty & Social Justice
- Why Women & Girls

- | Source |
|----------------|
| Phone Call |
| Email |
| Web |
| SMS |
| Vovacare Kiosk |

These values can be easily customized to fit your organization needs (Advanced Configuration Training)

Enter Feedback/Complaint Classification information



FEEDBACK/COMPLAINT CLASSIFICATION	
Feedback Type	--
Complaint Type	--
Priority	--
Related to	--
CARE Project	--

Feedback Type	Question Complaint Request Suggestion Appreciation Other --
Complaint Type	General Complaint Abuse of Authority Assault - Threat Conflict of interest Corruption - Bribery Fraud Injustice Misrepresentation Misuse of CARE resources Sexual Harassment Theft - Embezzlement
Priority	Category 1: Minor Category 2: Casual Category 3: Pressing Category 4: Urgent Category 5: Very Urgent

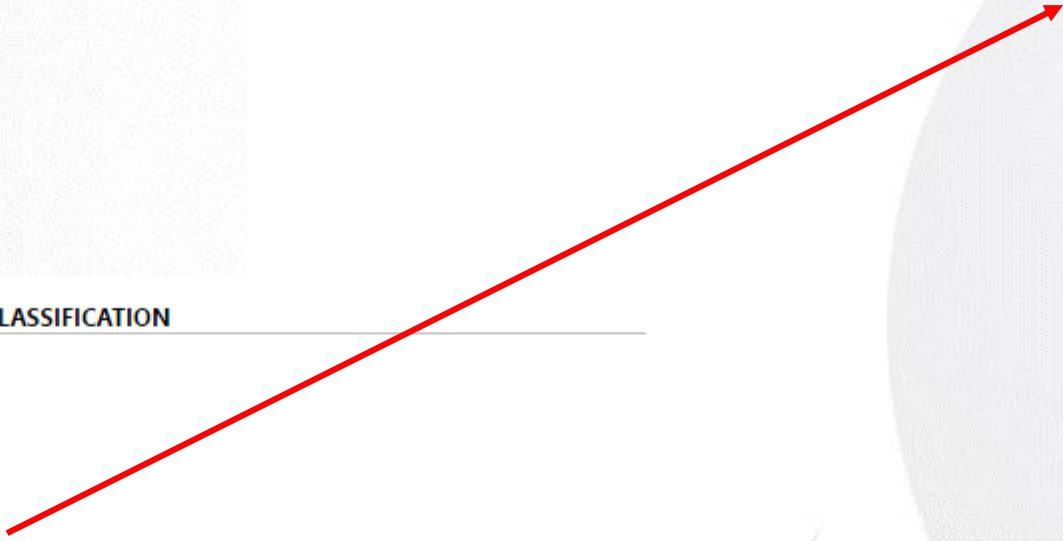
Enter Feedback/Complaint Classification information



- Related to
- CARE Scope: Regular Issue - Project Related
 - CARE Scope: Regular Issue - Not Project Related
 - CARE Scope: Regular Issue - Other
 - CARE Scope: Sensitive Issue - Immediate Action Required
 - CARE Scope: Sensitive Issue - No Immediate Action Required
 - CARE Scope: Sensitive Issue - Other
 - CARE Scope: Sensitive Issue - No Immediate Action Required
 - CARE Scope: Sensitive Issue - Other
 - Out of CARE Scope: Government Related
 - Out of CARE Scope: Related to other NGO - Partner Agency
 - Out of CARE Scope: Related to other NGO - Not a Partner Agency
 - Out of CARE Scope: Other

FEEDBACK/COMPLAINT CLASSIFICATION

Feedback Type	--
Complaint Type	--
Priority	--
Related to	--
CARE Project	-- <input type="text"/>



Feedback/Complaint Case: Responsible Party & Actions Taken



RESPONSIBLE PARTY

Case Responsible Individual	Case Responsible Group
--	--
Case Responsible Person Has Been Notified	Date Responsible Individual Was Notified
No	--

Indicate the Stakeholder Group and the Individual who should be responsible to follow up this Case

ACTION TAKEN BY RESPONSIBLE PARTY

First Response Was Sent	
No	
Action has been taken	Date Notified About Action Taken
No	--

Indicate the details regarding the action that was taken by the Responsible Party.

- Was a first response (acknowledgment) sent to the Feedback/Complaint?
- Has an action been taken?
 - When were you notified that an action was taken?
 - What was the action that was taken?

Description of action taken by Responsible Person
--

Feedback/Complaint Case: Confidentiality



CONFIDENTIALITY:

Complaint is Confidential

No

Consent to check your complaint with the person reported/complainee

--

Comment

--

Description of Evidence Available

--

STAKEHOLDER PREFERENCE

Response Wanted

Yes

Consent to provide Contact Details

No

- Indicate whether the Stakeholder who submitted the feedback/complaint has indicated the complaint should be considered as CONFIDENTIAL

- Indicate whether the Stakeholder who submitted the feedback/complaint has indicated he/she agrees to have the complaint checked with the person reported/complained about

- Specify the type of evidence that may be available

- Indicate whether the Stakeholder who submitted the feedback/complaint has indicated he/she wants a response

- Indicate whether the Stakeholder who submitted the feedback/complaint has indicated he/she agrees to provide his/her contact details

Process Bar



To help resolve a case, each stage and step is clearly outlined in the process bar at the top of the screen. You'll see the process bar when you move from one stage to the next when you're working on a case.

FEEDBACK CASE ▾

New Feedback Case

Priority -- Created On -- Status In Progress Owner

Categorize Case (Active) → Identify Case Owner → Contact Case Owner → Get Owner Notification → Respond → Close Case

Find Stakeholder* [click to enter](#) Priority [click to enter](#)

Related to [click to enter](#)

Subject [click to enter](#)

1. Choose a field to enter data as you handle the details.

2. Choose the process bar to see the steps in a stage.

Track your communication history



FEEDBACK CASE ▾

New Feedback Case

Priority: -- Created On: -- Status: In Progress Owner*: CARE4U Pla

▶ Categorize Case (Active) ▶ Identify Case Owner ▶ Contact Case Owner ▶ Get Owner Notification ▶ Respond ▶ Close Case ▶ Next Step

Find Stakeholder* [click to enter](#) Priority [click to enter](#)
Related to [click to enter](#)
Subject [click to enter](#)

-- Case Responsible Individual: -- Case Responsible Group: --

Action Stakeholder Expects From CARE: -- Case Responsible Person Has Been Notified: **No** Date Responsible Individual Was Notified: --

CONTROL PANEL

POSTS **ACTIVITIES** **KB RECORDS** **NOTES**

All ▾ | Add Phone Call Add Task ...

We didn't find any activity records.

ACTION TAKEN BY RESPONSIBLE

CONFIDENTIALITY

Action Taken

- Choose Activities > Add Phone Call or choose NOTES to add your case activities and notes.

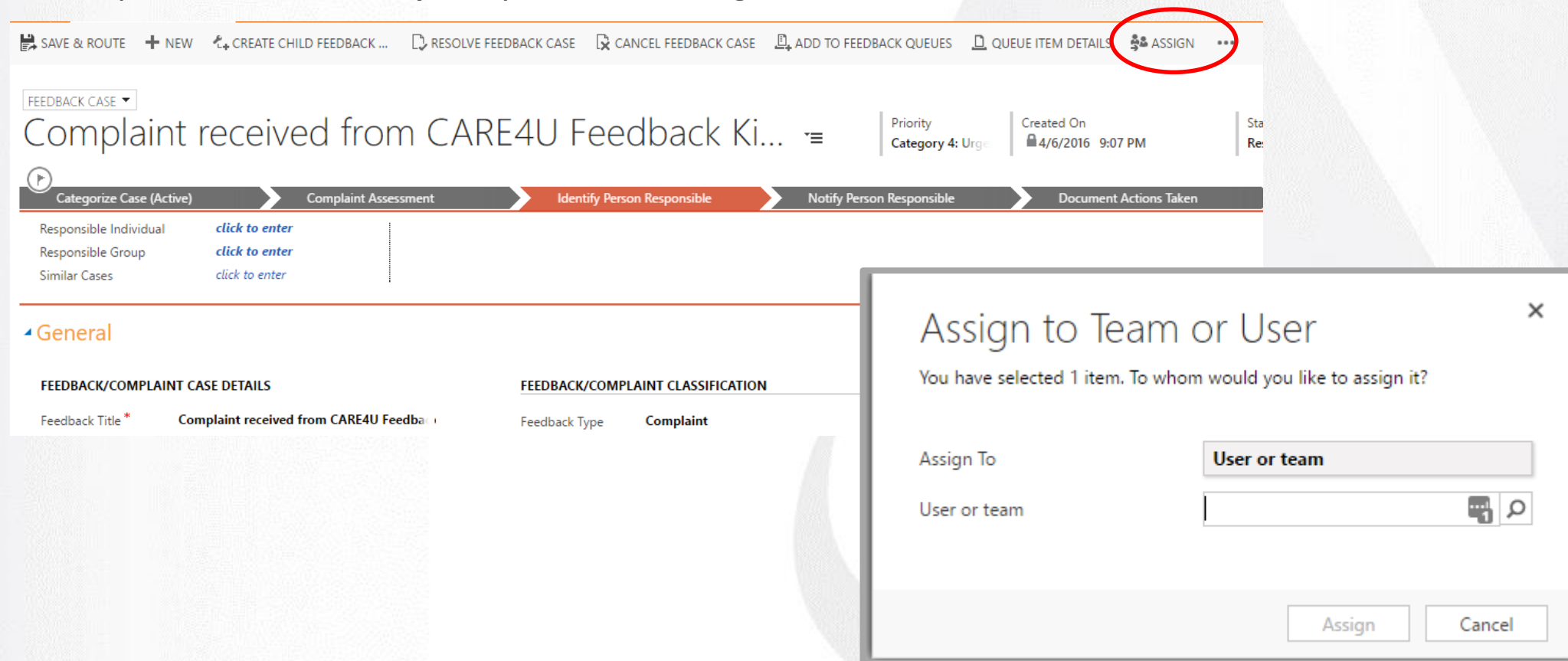
Exercise



- You receive feedback from a Partner that their branding is not enough taken into account for certain projects.
- Create a Feedback Case in the system.

Reassign a case to someone else

If you don't have enough information to resolve a case, or if you think another member in your team has expertise on the subject, you can reassign the case to them.



The screenshot displays the VOVACARE interface for a feedback case. The top navigation bar includes options like 'SAVE & ROUTE', 'NEW', 'CREATE CHILD FEEDBACK ...', 'RESOLVE FEEDBACK CASE', 'CANCEL FEEDBACK CASE', 'ADD TO FEEDBACK QUEUES', 'QUEUE ITEM DETAILS', and 'ASSIGN' (highlighted with a red circle). The main content area shows a case titled 'Complaint received from CARE4U Feedback Ki...' with a priority of 'Category 4: Urgent' and a creation date of '4/6/2016 9:07 PM'. A progress bar indicates the current step is 'Identify Person Responsible'. Below this, there are fields for 'Responsible Individual', 'Responsible Group', and 'Similar Cases', each with a 'click to enter' link. The 'General' section is expanded, showing 'FEEDBACK/COMPLAINT CASE DETAILS' and 'FEEDBACK/COMPLAINT CLASSIFICATION'. A modal dialog box titled 'Assign to Team or User' is open, asking 'You have selected 1 item. To whom would you like to assign it?'. The dialog has a dropdown menu for 'Assign To' set to 'User or team', a search input field, and 'Assign' and 'Cancel' buttons.

Merge similar cases



Eliminate redundancies between similar cases by merging them into one case. When a stakeholder submits multiple cases about the same issue (through different channels) or when multiple Individuals from the same group call in about the same issue, you can merge those cases into one case.

+ NEW FEEDBACK CASE PHONE SUPPORT ASSOCIATE CHILD FEEDBA... **MERGE CASES** EDIT DELETE

★ All Feedback Cases ▾

✓	Feedback Case Title ↑	Feedback Case Number	Priority	Origin
✓	Complaint received from CARE4U Feedback Kiosk	CAS-00091-V6V6H3	Category 4: Urgent	Vovacare Kiosk
✓	Complaint received from CARE4U website	CAS-00088-L1T7R9		Web



Merge Feedback Cases

Select the feedback case that the other feedback cases will be merged into. Review the feedback cases and corresponding customers before you merge the feedback cases. You can't undo this action.

	Feedback Case Title	Customer ↑	Priority	Created On ↓
🌐	Complaint received from C...	Jenny Test User		4/6/2016 6:44 PM
📧	Complaint received from C...	Josiane Test User	Category 4: Urgent	4/6/2016 9:07 PM

1 - 2 of 2 (0 selected) Page 1

Merge Cancel

Exercise



- Think about a complaint you have recently handled. Create a Complaint Case using the Care4u public website (<http://care4u.vovacare.org>)
- Create the same complaint by sending a short SMS to the CARE4U platform mobile number: **0787-953-853**
- Merge these 2 cases as one.

Create Child Cases when needed



When there is a case where work needs to be done by multiple teams or when one issue effects multiple stakeholders, now you can open a primary case, called the *parent* case, and then create a secondary case, called the *child* case.

The screenshot shows the CARE4U interface. The top navigation bar includes 'Feedback & Compl...', 'Feedback Cases', and 'Complaint received ...'. Below this, a toolbar contains 'SAVE & ROUTE', '+ NEW', 'CREATE CHILD FEEDBACK ...', 'RESOLVE FEEDBACK CASE', 'CANCEL FEEDBACK CASE', and 'ADD TO FEEDBACK QUEUES'. The 'CREATE CHILD FEEDBACK ...' button is circled in red. A red arrow points from this button to a detailed view of a 'Feedback Case'.

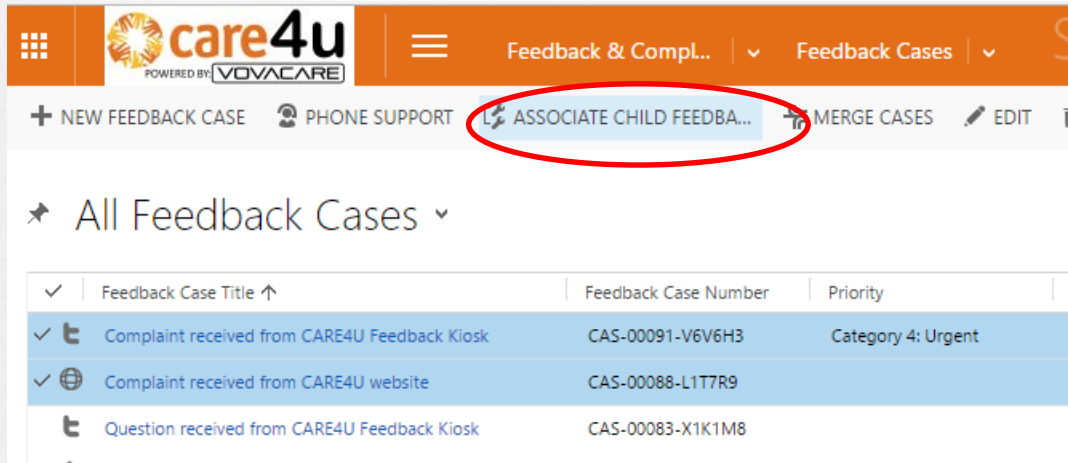
The detailed view shows the following information:

- Feedback Case Details:**
 - Customer: Josiane Test User
 - Feedback Case Title: Complaint received from CARE4U Feedback Ki...
 - Subject: --
 - Feedback Case Type: --
 - Contact: --
 - Assign to Others: CARE4U Platform
 - Parent Feedback Case: Complaint received from CARE4U Feedback Ki...
- Other Details:**
 - Origin: --
 - Project: --
 - Entitlement: --
 - First Response By: --
 - Resolve By: --
- Description:** --

IMPORTANT : The child case option isn't available for child cases of other cases. However, if child cases are deleted from other parent cases, then the child case option is available.

Create Child Cases when needed...(continued)

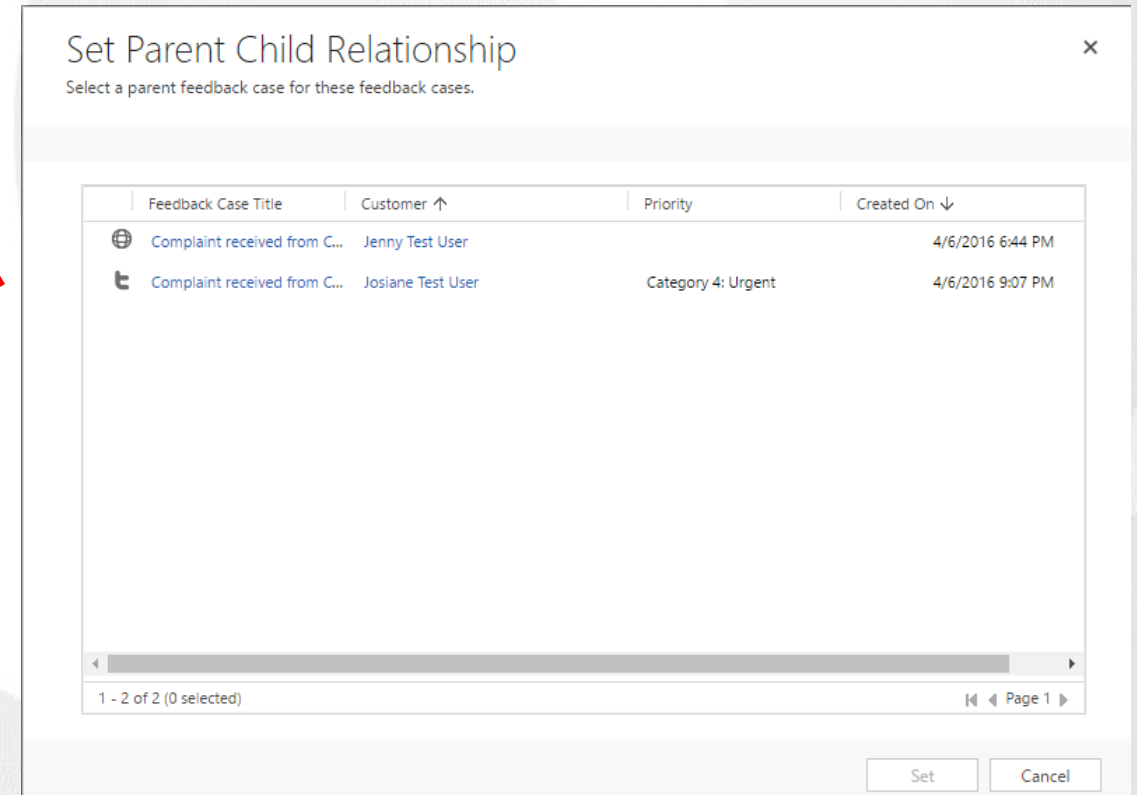
You can also associate an existing case as a child case from your active list of cases.



The screenshot shows the top navigation bar of the care4u system. The 'ASSOCIATE CHILD FEEDBACK CASES' button is highlighted with a red circle. Below the navigation bar, there is a table of feedback cases.

Feedback Case Title ↑	Feedback Case Number	Priority
Complaint received from CARE4U Feedback Kiosk	CAS-00091-V6V6H3	Category 4: Urgent
Complaint received from CARE4U website	CAS-00088-L1T7R9	
Question received from CARE4U Feedback Kiosk	CAS-00083-X1K1M8	

1. Select the cases that you want associate.
2. Choose **Associate Child Cases**.
3. Select a parent case for the child cases.
4. Choose **Set**.



The dialog box is titled 'Set Parent Child Relationship' and contains a table of parent cases to select from. A red arrow points from the 'ASSOCIATE CHILD FEEDBACK CASES' button in the previous screenshot to this dialog box.

Feedback Case Title	Customer ↑	Priority	Created On ↓
Complaint received from C...	Jenny Test User		4/6/2016 6:44 PM
Complaint received from C...	Josiane Test User	Category 4: Urgent	4/6/2016 9:07 PM

1 - 2 of 2 (0 selected) Page 1

Set Cancel

Exercise



- Create a sub-case (child case) based on the initial Complaint you submitted on the CARE4U public website.

Understanding Feedback Queues

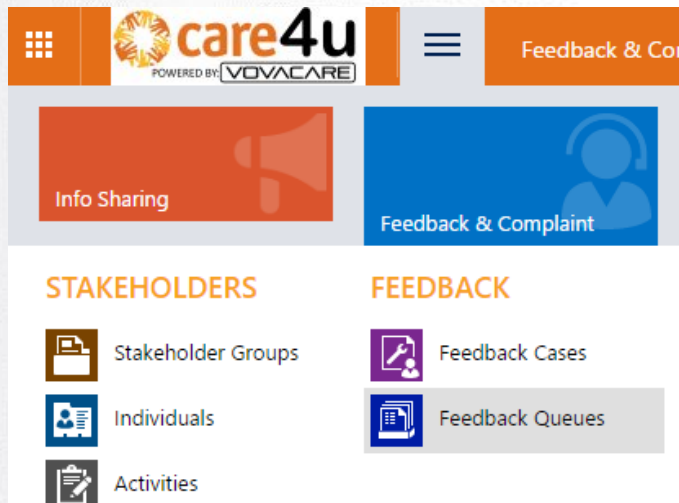


- Feedback Queues are designed for shared work items
- Personal Queues
 - When users and teams are added, a default queue is configured
 - When assigned a queue item, it moves to the personal queue
- System Queues
 - These are containers for work items that a group of people will work from a list
 - Users will mark those items they are working on

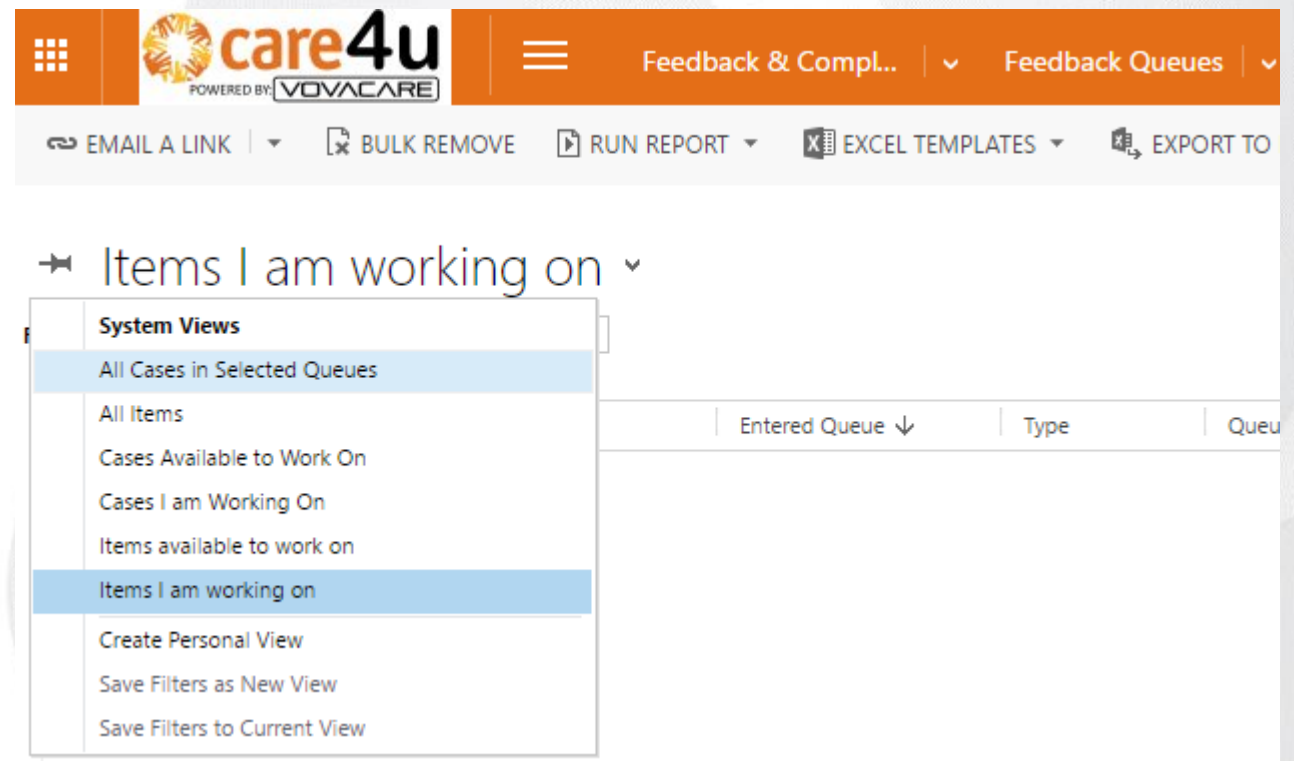
Look for open cases that need to be worked on



Use queues to quickly see cases assigned to you or cases that are available to work on.

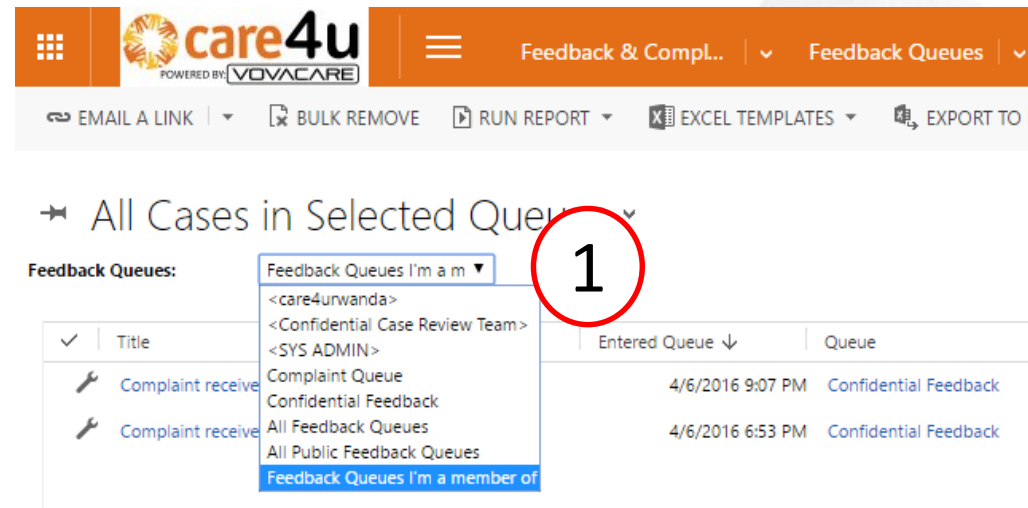


Select a View



...continued

1. Select a queue.
2. Select the case or item that you want to work on.
3. On the command bar, choose **Pick**.



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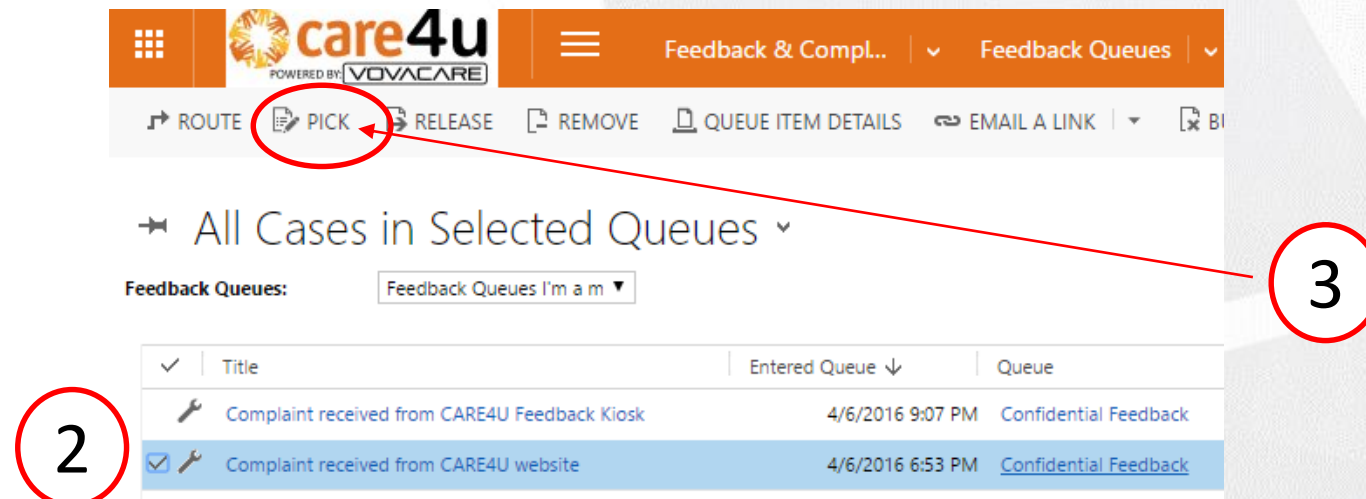
Feedback & Compl... Feedback Queues

EMAIL A LINK BULK REMOVE RUN REPORT EXCEL TEMPLATES EXPORT TO I

All Cases in Selected Queues

Feedback Queues: Feedback Queues I'm a member of

✓	Title	Entered Queue ↓	Queue
	Complaint received from CARE4U Feedback Kiosk	4/6/2016 9:07 PM	Confidential Feedback
	Complaint received from CARE4U website	4/6/2016 6:53 PM	Confidential Feedback



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Feedback & Compl... Feedback Queues

ROUTE PICK RELEASE REMOVE QUEUE ITEM DETAILS EMAIL A LINK BI

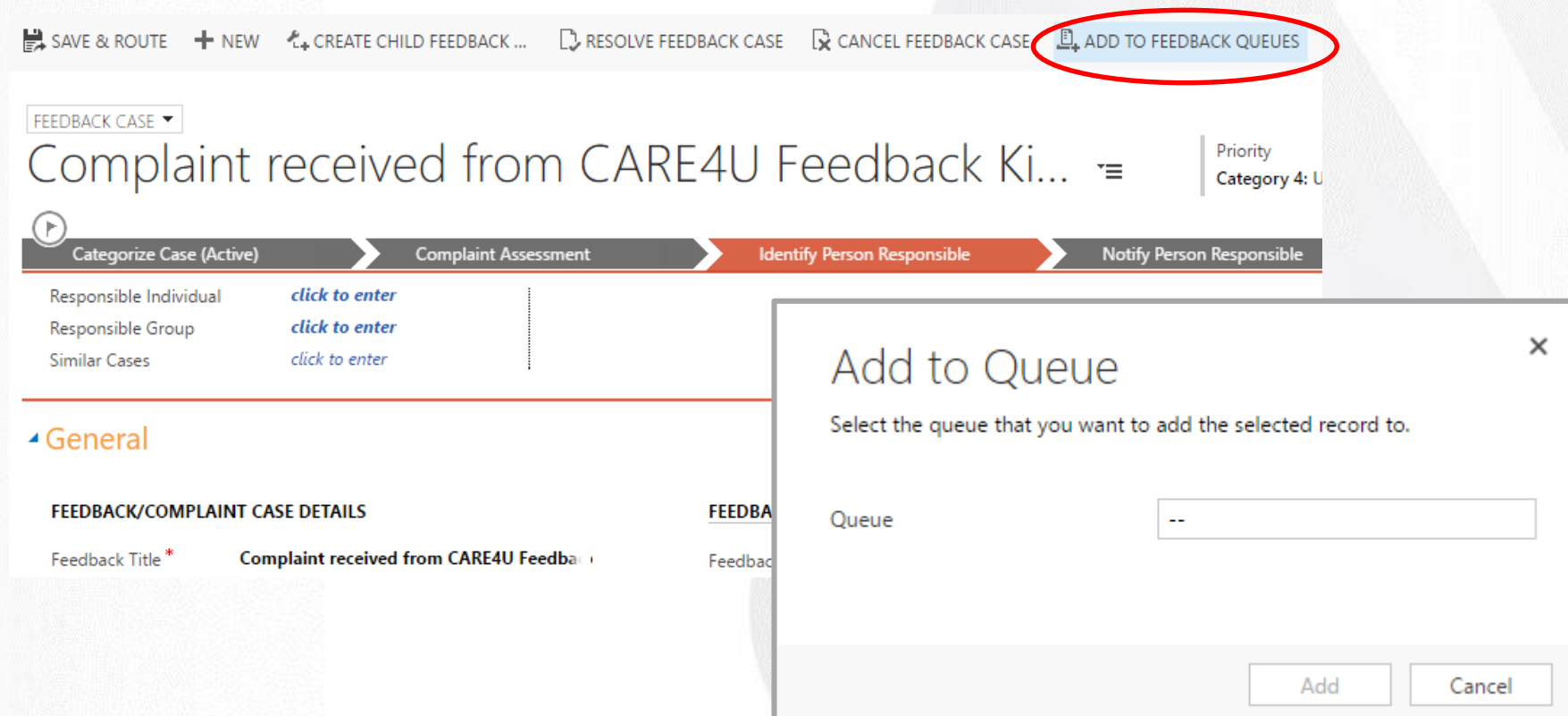
All Cases in Selected Queues

Feedback Queues: Feedback Queues I'm a member of

✓	Title	Entered Queue ↓	Queue
	Complaint received from CARE4U Feedback Kiosk	4/6/2016 9:07 PM	Confidential Feedback
✓	Complaint received from CARE4U website	4/6/2016 6:53 PM	Confidential Feedback

Put a case back in to the queue

If you don't know who to assign the case to, you can move the case to a queue and have someone else pick it up.



The screenshot displays a software interface for managing feedback cases. At the top, a navigation bar includes buttons for 'SAVE & ROUTE', '+ NEW', 'CREATE CHILD FEEDBACK ...', 'RESOLVE FEEDBACK CASE', 'CANCEL FEEDBACK CASE', and 'ADD TO FEEDBACK QUEUES'. The 'ADD TO FEEDBACK QUEUES' button is circled in red. Below the navigation bar, the main content area shows a 'FEEDBACK CASE' dropdown menu and the title 'Complaint received from CARE4U Feedback Ki...'. To the right, the 'Priority' is set to 'Category 4: U'. A progress bar below the title indicates the current step: 'Identify Person Responsible'. Underneath, there are fields for 'Responsible Individual', 'Responsible Group', and 'Similar Cases', each with a 'click to enter' link. A 'General' section is also visible. In the foreground, an 'Add to Queue' dialog box is open, prompting the user to 'Select the queue that you want to add the selected record to.' The dialog features a 'Queue' dropdown menu with '--' selected and 'Add' and 'Cancel' buttons at the bottom.

See what queue a case belongs to



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Feedback & Compl... Feedback Cases Complaint received ...

SAVE & ROUTE + NEW CREATE CHILD FEEDBACK ... RESOLVE FEEDBACK CASE CANCEL FEEDBACK CASE ADD TO FEEDBACK QUEUES **QUEUE ITEM DETAILS**

FEEDBACK CASE

Complaint received from CARE4U Feedback Ki... Priority Category 4: Urg... Create 4/6/2016 9:07

Queue Item: Complaint received from CARE4U Feedback Kiosk - Microsoft Dynamics CRM - Google Chrome

https://care4u.crm4.dynamics.com/main.aspx?etc=2029&extraqs=%3fetc%3d2029%26id%3d7c35b3d2-2afc-e511-80df-5065f38b82b1&histKey=365621135&newWindow=true

FILE QUEUE ITEM CUSTOMIZE

Save Save & Close View Hierarchy Copy a Link Unfollow Email a Link Run Workflow Start Dialog Collaborate Process

Queue Item : Information

General

Queue Item

Complaint received from CARE4U Feedback Kiosk

Queue Items

Related

- Common
 - Audit History
- Process Sessions
 - Background Processes
 - Real-time Processes

General

Queue * Confidential Feedback Queue Item * Complaint received from CARE4U Feedback Kiosk

Worked By

Entered Queue 4/6/2016 9:07 PM

Modified On 4/6/2016 9:07 PM

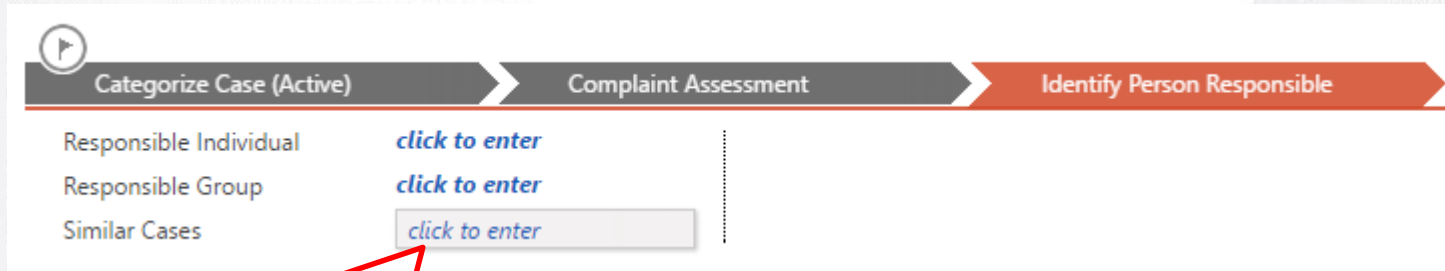
Exercise



- Add your complaint to the Complaint Queue
- Pick up the Complaint to indicate to others you will be working on it
- Open the Complaint Queue and verify that your complaint is there

Look up solutions from other cases

Look at similar cases to help you resolve the case you're working on.

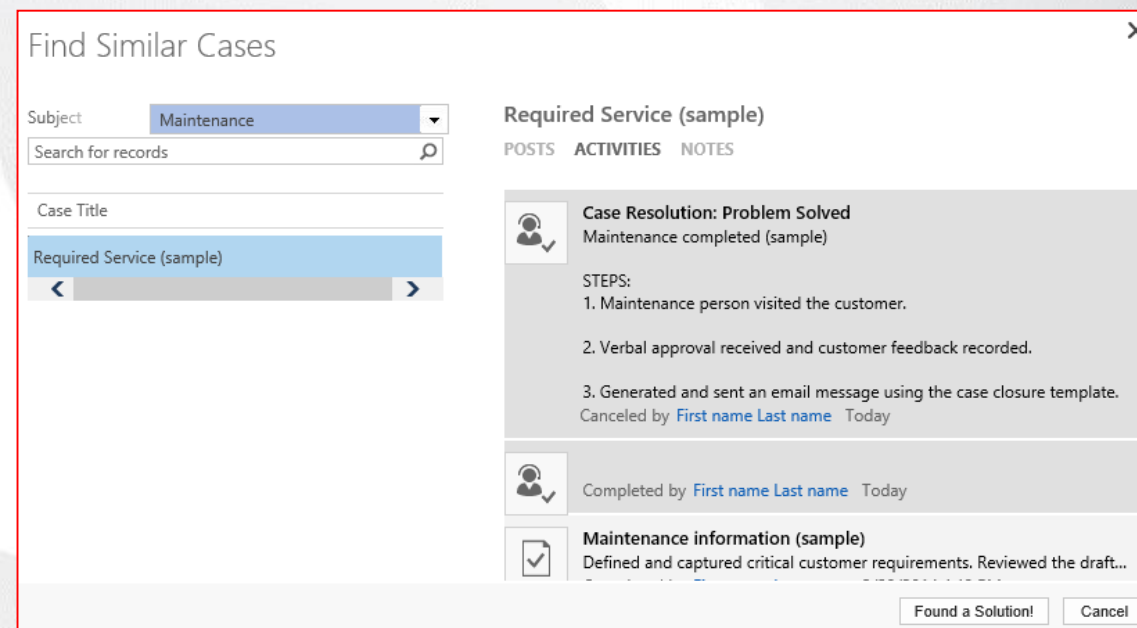


Responsible Individual [click to enter](#)

Responsible Group [click to enter](#)

Similar Cases [click to enter](#)

Click here to search cases with a similar subject



Find Similar Cases

Subject Maintenance

Search for records

Case Title

Required Service (sample)

Required Service (sample)

Case Resolution: Problem Solved
Maintenance completed (sample)

STEPS:

- Maintenance person visited the customer.
- Verbal approval received and customer feedback recorded.
- Generated and sent an email message using the case closure template.
Canceled by [First name Last name](#) Today

Completed by [First name Last name](#) Today

Maintenance information (sample)
Defined and captured critical customer requirements. Reviewed the draft...

Found a Solution! Cancel

1. Choose **Case Relationships**.
2. Choose (+) **Add Connection record**.
3. From the **Find Similar Cases** dialog box, use the search to find similar cases.
4. Once you find the case that has the information you need to resolve the case you're working on, choose the case, and then choose **Found a Solution**.

Close a Case



To close a case, click on “Resolve Feedback Case”.

Resolution Type * **Problem Solved**

Resolution * --

Total Time **0 minutes**

Billable Time * **0 minutes**

Remarks --

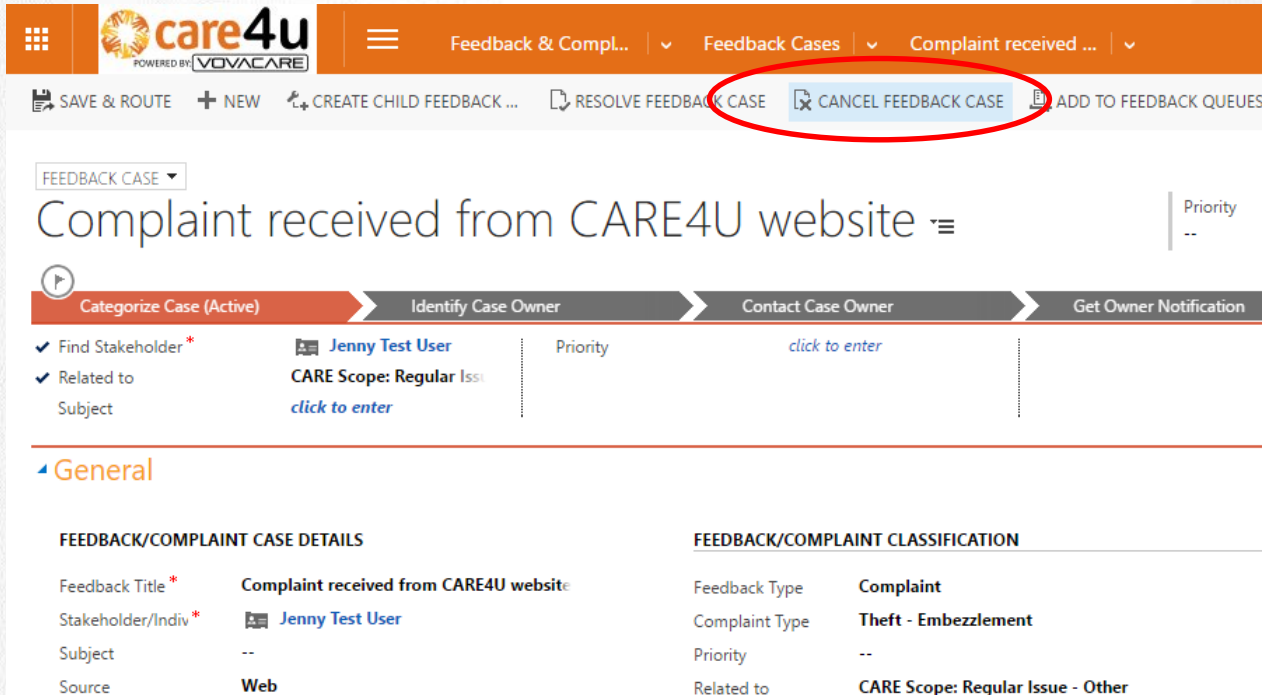
Resolve Cancel

- Enter a resolution type (Problem Solved, Information Provided)
- Enter short description of the resolution

- Enter detailed remarks if applicable

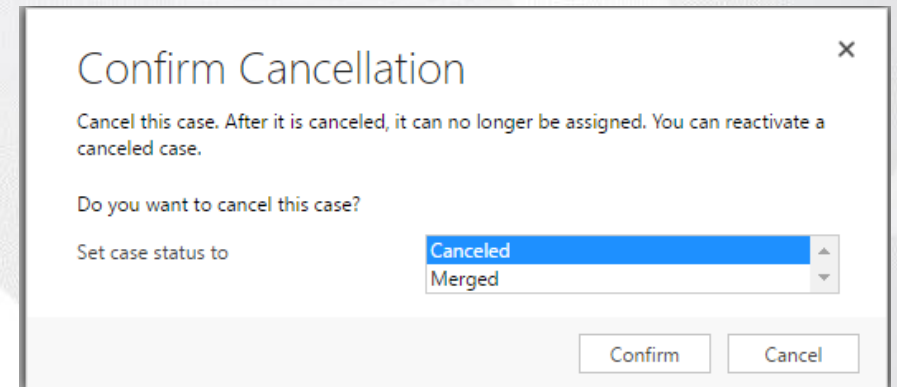
Cancel a Case

To cancel a case, click on “Cancel Feedback Case”.



The screenshot shows the CARE4U web application interface. At the top, there is a navigation bar with the CARE4U logo and a menu. Below the navigation bar, there are several action buttons: "SAVE & ROUTE", "+ NEW", "CREATE CHILD FEEDBACK ...", "RESOLVE FEEDBACK CASE", "CANCEL FEEDBACK CASE" (highlighted with a red circle), and "ADD TO FEEDBACK QUEUES". The main content area displays a feedback case titled "Complaint received from CARE4U website". Below the title, there is a progress bar with four steps: "Categorize Case (Active)", "Identify Case Owner", "Contact Case Owner", and "Get Owner Notification". The "Categorize Case (Active)" step is expanded, showing details for "Find Stakeholder*" (Jenny Test User), "Related to" (CARE Scope: Regular Issue), and "Subject". Below the progress bar, there is a "General" section with two columns of case details: "FEEDBACK/COMPLAINT CASE DETAILS" and "FEEDBACK/COMPLAINT CLASSIFICATION".

FEEDBACK/COMPLAINT CASE DETAILS		FEEDBACK/COMPLAINT CLASSIFICATION	
Feedback Title *	Complaint received from CARE4U website	Feedback Type	Complaint
Stakeholder/Indiv *	Jenny Test User	Complaint Type	Theft - Embezzlement
Subject	--	Priority	--
Source	Web	Related to	CARE Scope: Regular Issue - Other



The dialog box titled "Confirm Cancellation" contains the following text and elements:

Cancel this case. After it is canceled, it can no longer be assigned. You can reactivate a canceled case.

Do you want to cancel this case?

Set case status to

Canceled
Merged

Confirm Cancel

Exercise



- Assign your complaint to a colleague
- Close your complaint by specifying the reason you are closing it

Q&A