Caller Requests to Record Phone Call Phone Enquiry KA

NCC PACE Knowledge Management Portal

Exported on 2024-12-03 21:41:39

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Search here to find NCC knowledge articles and guidance.Search

To be used by NCC.

This article helps you to:

- Understand what to do if a caller is requesting to record their phone call with the NCC.

3 Overview

- Some callers like to record their conversations with the NDIA, so they can play them back to their family, Local Area Coordinator or support coordinator at a later date.
- Recording conversations is legal and a valid request.
- However, the caller requires consent from the NCC Service Officer they are speaking with to do this.
- If the NCC Service Officer doesn't want to be recorded by the caller, they can refer the call to their direct supervisor.

4 Procedure

To complete the PACE Steps:

- Navigate to the relevant account for historical information and activities to assist with the enquiry.
- Follow the PACE steps below to complete the enquiry.
- If further guidance is required to resolve the enquiry, refer to the relevant NCC guidance resources.

5 Frequently asked questions

5.1 Can I record this call?

- If yes, the NCC Service Officer is comfortable being recorded by the caller:

Suggested scripting

Start Quote Icon **Yes,** you can, but it is important you keep the call information to yourself, and not share it publicly through social media or other channels. End Quote Icon

- If no, the NCC Service Officer doesn't want to be recorded by the caller:

Suggested scripting

Start Quote Icon **No,** I am not comfortable with you recording this conversation, do you mind if I transfer you to my supervisor, and they can take the call from here. End Quote Icon

5.2 It is my private information, why can’t I share this information if I want to?

Suggested scripting

Start Quote Icon If we discuss your private information on the call, it is still specific to your situation, so has no bearing on other participants. It is also a breach of privacy for you to share it publicly online or through social media channels. The more people know about you, the more you are at risk of having your information stolen, or used in a way you do not want it to be used. End Quote Icon Can I share the recorded call with my family, carer or support coordinator?

Suggested scripting:

Start Quote Icon If you’re recording the call so you can share it with someone involved in your support or care, it is fine to share the recording with them. End Quote Icon

6 Call handling instructions for enquiries

NCC Service Officers who are asked if the caller can record the call should:

- Provide the caller with verbal consent to record the call, or refer the call to their supervisor if they do not wish to be recorded.
- Advise the caller that any specific information about their individual circumstances, needs or support would not be suitable or accurate for every participant's individual needs.
- Inform the caller that it is unlawful to share the recording on social media or other digital channels, even though the information discussed is their own private information.
- Explain to the caller the importance of keeping their private information private. Sharing the recording on public channels such as social media or other public channels would put them at risk of identity theft.
- Mention to the caller that the more people with access to their personal information, the more at risk they are of this information being used in ways they have not intended it to be used.
- If they have a complaint or require further information they can send an email to privacy@ndis.gov.au or call us on 1800 800 110.

7 Further information

Please refer to:

- Privacy Phone Enquiry KA

8 Enquiry note template

To be used when accessing a participant record after receiving a general enquiry or any other enquiry that does not have a template.

8.1 General enquiry

Copy and paste all text below to use in the enquiry note:

Date of enquiry: DD/MM/YYYYPerson making enquiry: Include name and relationship to Participant (if not Participant)Contact number:
Details of the query:
Action taken:

Name:
Log on ID:
Service Officer
National Contact Centre

9 Document owner and approver

Director, Service Support, Contact Centre Branch

10 Feedback

If you have any feedback about this procedure, please refer to your NCC Team Leader.

- **NCC Service Officers (NCC SOs)** please send your feedback to your NCC Team Leader. Your Team Leader may have an answer to your question or have information to share with you to resolve your questions and feedback.
- **NCC Team Leaders (NCC TLs)** please review the feedback from NCC SOs and provide advice, information and resolve questions where possible. NCC TLs can request new or updated NCC Guidance Resources and assistance using the relevant form on the National Contact Centre Service Desk on the intranet.

Amazon Connect Telephony Responses QRG

NCC PACE Knowledge Management Portal

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Use this link to navigate back to KNOWA 2.0 home page.
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Search here to find NCC knowledge articles and guidance.Search

This guidance resource provides suggested **scripting**, to assist NCC Service Officer in providing effective responses when handling telephony enquiries.

To be used by NCC.

This article assists you to:

- Provide a professional caller experience during the conversation to ensure a positive outcome while aiming for first call resolution.

18/09/2024	Removed link to 'Amazon Connect Canned Responses QRG' and 'Amazon Connect Webchat Guidance'.

3 Conversation guide

To communicate professionally with callers, you should follow these guidelines:

- Be alert and focused on the call, and avoid any distractions or interruptions.
- Be confident, friendly and respectful, and use a polite and courteous tone of voice.
- Ensure respect and understanding by being patient and engaging with active listening. This means acknowledging the caller's feelings, summarizing their main points, and asking clarifying questions if needed.
- Build rapport with the caller by using their name, showing empathy, and expressing appreciation for their cooperation.
- Enunciate your words clearly and at a moderate pace, and avoid using jargon or slang. If necessary, repeat the information or spell out the words to avoid any confusion or misunderstanding.

By following these guidelines, you will make the caller feel valued, understood, and trust that you will provide the best solution for them. Refer to Call Handling Basics KA and Handling Challenging Calls KA for more information.

Remember

- Avoid using mute and use hold where required.
- Ensure your microphone on your headset is not too close to your mouth to reduce feedback.
- Eliminate or move away from background noise if possible.
- Identify any communication barriers and look into what alternatives are in place.
- Listen effectively and allow caller to speak.
- Check for understanding so that the caller's needs are met.
- Avoid interrupting when the other person is speaking.
- Stay calm and remain professional.
- Offer solutions.

4 Greet the caller

A professional greeting is the first step to a positive experience for the caller and reassures the them that they are speaking with the right person to resolve their enquiry.

Suggested scripting:

Start Quote Icon Welcome to the NDIS National Contact Centre, this is <Service Officer name>, how may I help you today? End Quote Icon

Start Quote Icon Welcome to the NDIS, you are speaking with <Service Officer name>, how may I help you today? End Quote Icon

> **Call recording disclosure**
> For inbound calls, the call recording disclosure is announced in the IVR greeting message.
> If the caller does not want their call recorded or they advise they are recording the call themselves, the Service Officer can select the "private button" to turn off call recording.

5 Verify the caller

When we are dealing with participant information it is a requirement to verify the caller and complete verification of identity (VOI). The Service Officer is to verify the caller, and then proceed with the enquiry.

- For further information on how to verify the caller refer to Evidence of Identity Phone Enquiry KA.

Suggested scripting:

Start Quote Icon Before we proceed, I will need to verify who I am speaking with and to do this I will need to ask you for your.. End Quote Icon

6 Establish the reason for the call

Establishing a reason for the call or identifying the issue that the caller needs resolved, is an important step to providing the best solution for the caller. In some instances, you may be required to ask discovery questions to better understand the enquiry which will also help to provide the best solution for the caller.

Suggested scripting:

Start Quote Icon I will need to ask you a few questions to better understand how I can assist you with your enquiry... End Quote Icon

Start Quote Icon To assist you further, I will need to ask you a few questions to better understand the situation... End Quote Icon

Start Quote Icon I do require some further information to assist you with your enquiry, can you tell me more about... End Quote Icon

7 Check and confirm understanding

Checking for understanding of the enquiry with the caller is important when communicating to avoid misunderstandings, as misunderstandings may result in the caller's expectations not being met. When checking for understanding with the caller, this will build trust, as well as ensuring you are correctly addressing requests for a better caller experience.

Service Officer is to listen to the caller and confirm with them that you understand why they are calling.

Suggested scripting:

Start Quote Icon So that I am confident that I understand the reason for your call, can I confirm with you....... End Quote Icon

Start Quote Icon To help me fully understand your enquiry, I just need to ask you a few questions to understand the situation better, is that okay? End Quote Icon

Start Quote Icon So, what you have provided so far is... <Service Officer to paraphrase what the caller has said>. End Quote Icon

8 Building rapport and empathy

Displaying empathy when on a call is important, as it shows that you understand and care about the caller's concerns. Stay positive, remain interested, and use a friendly and helpful tone. Building rapport with the caller strengthens mutual trust and improves engagement between the caller and the Service Officer.

Suggested scripting:

Start Quote Icon I appreciate this has been frustrating for you and I am glad you are bringing this to our attention, I will .... End Quote Icon

Start Quote Icon Thank you for providing the feedback. I can hear your frustration, I am here to assist you and work with you to resolve your enquiry. End Quote Icon

Start Quote Icon I hear that this was not a good experience for you, I am here to help resolve this matter with you. End Quote Icon

9 Placing the caller on hold

You may need to place a caller on hold when you need to source information, read notes on the record or access further instructions. Placing the caller on hold is used to review the participant record history and notes (interactions and enquiry notes) or to ask for assistance from floor support or a NCC Team Leader.

Suggested scripting:

Start Quote Icon Thank you for providing me with your information. I will need to place you on hold for about 2 - 3 minutes to look into this for you, will that be okay? End Quote Icon

Start Quote Icon I will need to place you on hold for a short moment, about 2 - 3 minutes, so I can confirm information about this case and answer your enquiry. Will that be okay <insert callers name>? End Quote Icon

Start Quote Icon Whilst I review the information on the record, I will need to place you on hold for a short moment, about 2 - 3 minutes, will that be okay? End Quote Icon

Start Quote Icon Thanks for that information <insert callers name> what I will need to do now is check your record to see how I can help and to do that I will need to place you on hold ..... End Quote Icon

> **Important**
> To manage the caller's expectations, provide them with the time you expect them to be on hold for, if you need longer than the advised time, return to the caller and advise you will need another 2 - 3 minutes.

10 Returning to the call after being on hold

It is important to re-engage with the caller appropriately and thank them for patiently waiting. This is a great way to acknowledge the caller's patience and to advise that you are working toward a solution for them.

Suggested scripting:

Start Quote Icon Thank you for waiting on the line while I review the information. I can confirm…. End Quote Icon

Start Quote Icon Thank you so much for patiently waiting, I have looked into your enquiry/record further and I can advise.... End Quote Icon

11 Summarise the actions taken and solutions

It is important to provide the caller with a summary of the actions completed to resolve the caller's enquiry to ensure expectations have been met.

Start Quote Icon Thank you for taking the time to discuss your situation. I feel that we have actioned what is required to ensure a resolution to your enquiry. In summary, I have.... End Quote Icon

Start Quote Icon I will now summarise the actions that have been taken to address your enquiry. End Quote Icon

Start Quote Icon I believe that we have resolved your enquiry by completing the following... End Quote Icon

12 Ending the call

Once you have completed all the necessary actions to resolve the caller's enquiry and are ready to end the call, it is important to thank the person for calling the NDIS.

Suggested scripting:

Start Quote Icon Thank you for taking the time to discuss your feedback with me today. Is there anything else that I can assist you? Thank you for calling the NDIS and have a great day. End Quote Icon

Start Quote Icon Thank you for the information you have provided today. I am glad that I have assisted you with your enquiry, if you require any further assistance, please do not hesitate to call back the National Contact Centre on 1800 800 110. End Quote Icon

Start Quote Icon I am glad that we have made progress with your enquiry today, thank you for calling the NDIS, have a great day. End Quote Icon

13 Transferring a call

At times you will be required to transfer a call to a specialised team to resolve the caller's enquiry.
There are two types of call transfers:

- **Warm transfer** is when the NCC Service Officer is able to connect to and speak directly with the team member which the call will be transferred.
- **Cold transfer** is when the NCC Service Officer is unable to speak directly with a team member as the line is busy or there is a holding queue.

When transferring a call, the NCC Service Officer must ensure that:

- They have answered questions that is in their scope to answer,
- resolved and taken action for the enquiry that in scope to resolve,
- ensure the caller is introduced to team member who is taking over the call.

Offer the caller the option to warm transfer the call:

- Advise the caller that you will now transfer the call to the appropriate area or team member who will be able to provide further assistance.

When connected to the appropriate area or team member, the NCC Service Officer is to:

- Provide their name,
- advise where they are calling from and why,
- provide details of the caller that the call will be warm transferred,
- go back to the original caller and advise they will now warm transfer the call,
- connect the call to all parties,
- release call when the caller and the appropriate area or team member has accepted the call.
- For further information on how to transfer a call, refer to Amazon Connect Telephony Service Officer Guidance KA.

Important
If a call is required to be transferred it is important that the NCC Service Officer attempts a warm transfer.
If a warm transfer is unable to be completed, ensure to advise the caller the option of transferring to a queue or calling back at a later time.

Warm Transfer suggested scripting:

Start Quote Icon I'm going to place you on hold for a short moment, about 1 - 2 minutes, whilst I transfer you through to our support team who can assist you further. I will provide them with the information of our call. Is that be okay with you? End Quote Icon

Start Quote Icon I would like to help you further, however, I need to connect you to the specific area that will handle your enquiry. If you could kindly stay on this line, I will connect you now. End Quote Icon

Start Quote Icon Do you mind if I place you on hold for a short moment, about 1 - 2 minutes, whilst I arrange to connect you to the right person that can assist you with your enquiry? End Quote Icon

Start Quote Icon Unfortunately, I am unable to manage your enquiry, I will need to place you on hold for a short moment, about 1 -2 minutes, while I connect you with another officer who will be able to assist you. End Quote Icon

When a warm transfer cannot be completed, offer to cold transfer the call:

- A call should only be cold transferred if the caller is in agreeance.
- The Service Officer is to ensure they provide the caller the option to be transferred to the holding queue or to call back at a later time.
- Advise the caller that you will now transfer the call to the appropriate area or team member who will be able to provide further assistance.

Cold Transfer suggested scripting:

Start Quote Icon Given the nature of your enquiry, I will need to transfer you to <name of area/team> and they will be able to assist you. You will need to provide the Service Officer with a summary of your enquiry, including your name and NDIS number. If you could kindly stay on the line, I will transfer you now. End Quote Icon

Start Quote Icon There seems to be a wait to speak with the support team, I can transfer you to the queue and a team member will assist you shortly? Alternately, you can call back later to see if the queue has progressed. End Quote Icon

Start Quote Icon I am going to place you on hold for a short moment and transfer you through to (name of area/team). You will need to provide them with your details so they can assist you further with your enquiry. End Quote Icon

14 Further information

Please refer to:

- Amazon Connect Telephony Service Officer Guidance KA
- Amazon Connect App Access Request Process TL
- Amazon Connect Team Leader Guidance KA

15 Document owner and approver

Director, Support and Communications, Contact Centre Branch

16 Feedback

If you have any feedback about this procedure, please refer to your NCC Team Leader.

- **NCC Service Officers (NCC SOs)** please send your feedback to your NCC Team Leader. Your Team Leader may have an answer to your question or have information to share with you to resolve your questions and feedback.
- **NCC Team Leaders (NCC TLs)** please review the feedback from NCC SOs and provide advice, information and resolve questions where possible. NCC TLs can request new or updated NCC Guidance Resources and assistance using the relevant form on the National Contact Centre Service Desk on the intranet.

Amazon Connect Team Leader Guidance KA

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2.1 To be used by NCC.

This article assists you to:

- Understand Team Leader functionality in Amazon Connect
- Use Amazon Connect to support and manage NCC Service Officers

05/09/2024	New section added 'How to barge into webchat' new feature available for Team Leaders to barge into the chat when needed.

3 General information

This resource is for **NCC Team Leaders** only and provides Amazon Connect instructions around how to:

- Log in as a NCC Team Leader.
- Change a Service Officer's status.
- Listen to a live call.
- take overto a live call.
- View queue data.
- Real-time Metrics Report.
- Listen to call recordings.
- How a Service Officer can disable call recordings.

4 How to log in as a NCC Team Leader

- To log into Amazon Connect you need to open your **My Apps (microsoft.com)**
- Select the **Amazon Connect: NCC Production tile**.
- Once you have selected the tile, this will automatically launch the Amazon Connect Dashboard.

- No username or password is required to log in to Amazon Connect.
- If you are unable to locate the **Amazon Connect: NCC Production tile,** please refer to the Amazon Connect App Access Request Process TL.

5 How to change a NCC Service Officers status

NCC Service Officer's manually set their status in the Contact Control Panel (CCP). However, on the real-time metrics report, Leaders can manually change the **Agent Activity** status of an NCC Service Officer. This overrides what the NCC Service Officer has set in the CCP.

To change a NCC Service Officer's status:

- To choose the Service Officer who you want to change their status, the **Analytics and Optimisation** icon on the left side of your screen.

Figure 1 Image of the Analytics and Optimisation icon which appears as a bar graph

- Select **Real-time metrics**.
- From the **Real-time metrics** screen select the **Agents** button.

Figure 2 Image of the Agents button which has an icon of people

- Find the applicable NCC Service Officer from the **Agent list**.
- Next to the NCC Service Officer in the **Agent Colum** you will see their current active status. Select the **downwards arrow** next to their current status.

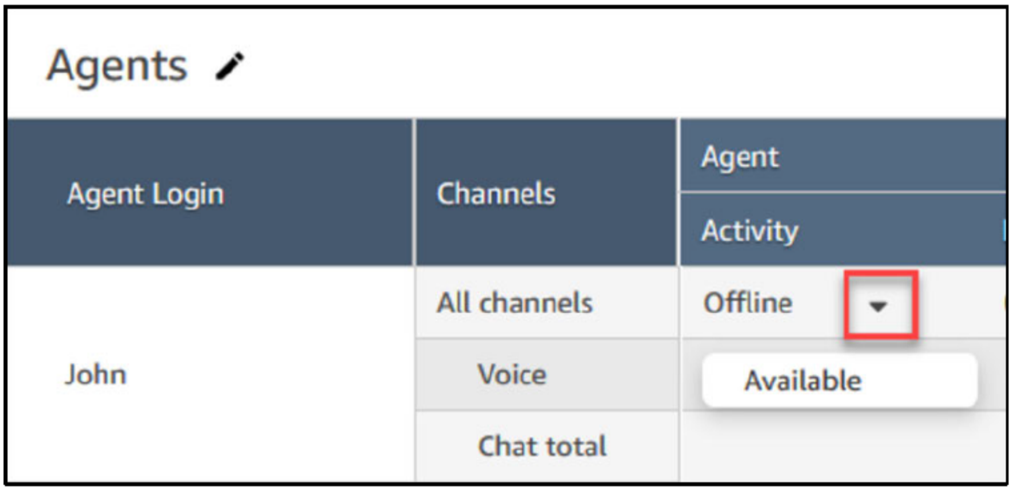


Figure 3 Image of the Agents screen highlighting the status dropdown arrow to the right of channels and agent name

- Select from the drop down the status that you want to change the NCC Service Officer to.

> You may get an error message if the status change cannot be applied. For example, changing a status from incoming to offline, even when the options are presented in the dropdown.

6 How to listen to a live call

To listen to a live call you need to:

- Open the Contact Control Panel (CCP) by selecting the Phone icon on the top- right corner of your screen, you will need the CCP open to connect into the live call.

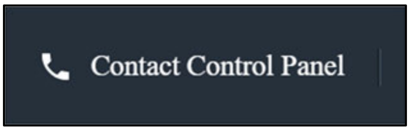


Figure 4 Image of the Contact Control Panel button

- To choose the NCC Service Officer conversation you want to listen to select the **Analytics and Optimisation** icon on the left side of your screen.

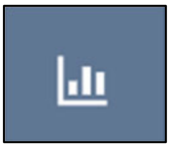


Figure 5 Image of the Analytics and Optimisation icon which appears as a bar graph

- Select **Real-time metrics**.
- From the **Real-time metrics** screen select the **Agents** button.

Figure 6 Image of the Agents button which has an icon of people

- To listen to a live call, find the applicable NCC Service Officer from the **Agent list**.
- There is an **eye icon** next to the applicable NCC Service Officer's Channel **Voice**.

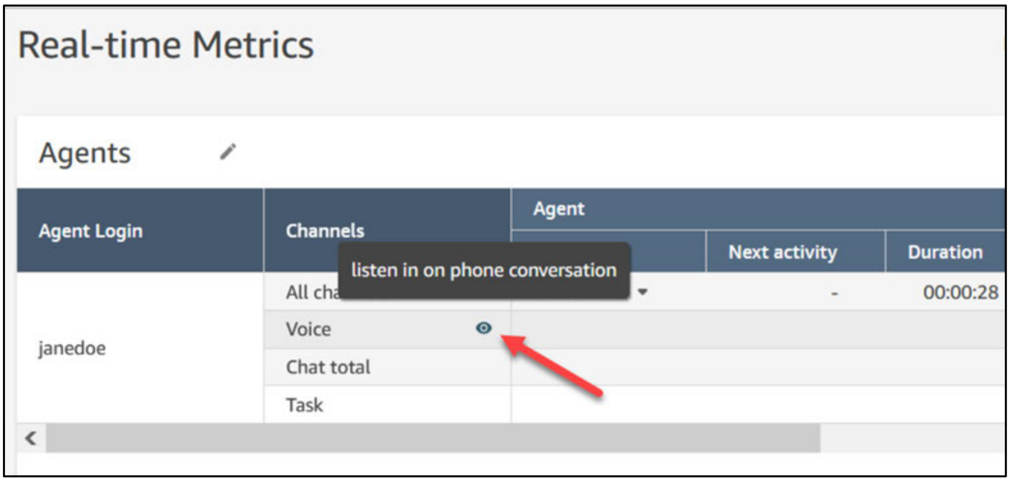


Figure 7 Image of the Agents screen in real time metrics highlighting the eye icon to the left of the Voice channel and agent name

- Select the **eye icon**, your CCP status will change automatically to **Monitoring**.

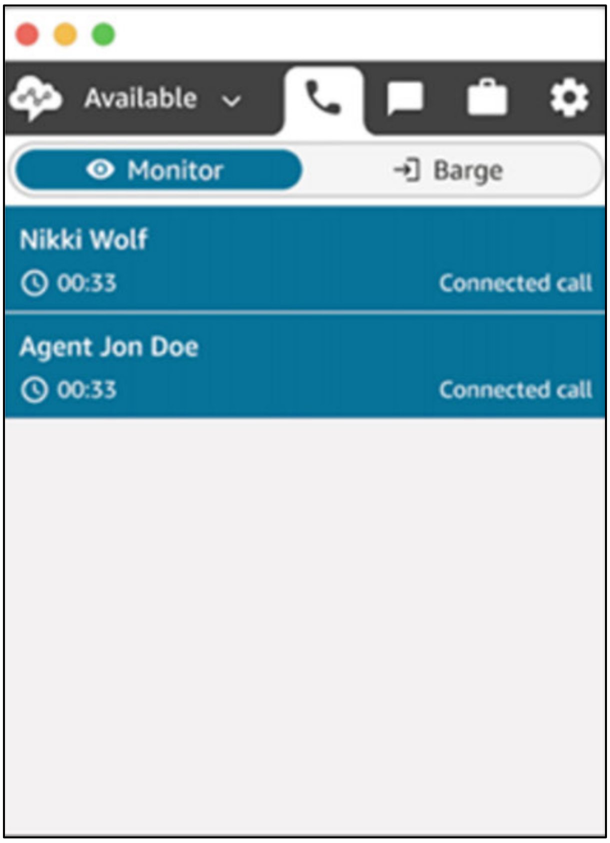


Figure 8 Image of the Contact Control Panel showing Monitor status and call details of the call being monitored

- To stop listening to a call, select **End call** on your CCP.

7 How to take over a live call

You can take over a conversation that you had been monitoring already.
In an emergency situation, Team Leaders can connect a call directly through to Emergency Services using Quick Connect and selecting **Emergency 000**.

Supervisors and managers can take over live conversations between NCC Service Officer's and a caller.

7.1 To take over a live call you need to:

- Open the Contact Control Panel (CCP) by selecting the Phone icon on the top- right corner of your screen, you will need the CCP open to connect into the live call.

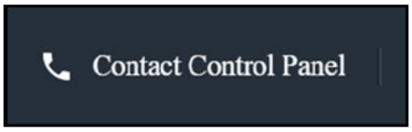


Figure 9 Image of the Contact Control Panel button

- To choose the NCC Service Officer conversation you want to barge select the **Analytics and Optimisation** icon on the left side of your screen.

Figure 10 Image of the Analytics and Optimisation icon which appears as a bar graph

- Select **Real-time metrics**.
- From the **Real-time metrics** screen select the **Agents** button.

Figure 11 Image of the Agents button which has an icon of people

- To listen to the live call which you would like to take over, find the applicable NCC Service Officer from the **Agent list**.
- There is an **eye icon** next to the applicable NCC Service Officer's Channel **Voice**.

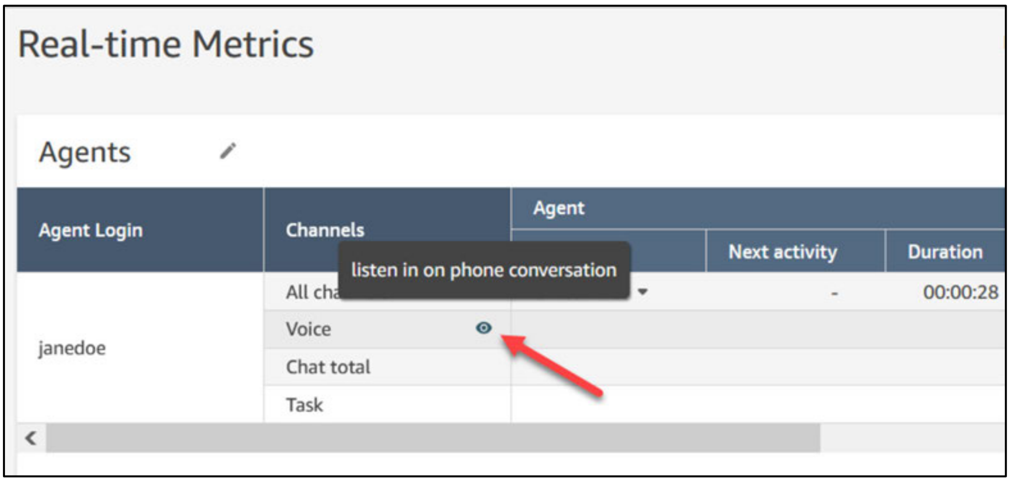


Figure 12 Image of the Agents screen in real time metrics highlighting the eye icon to the left of the Voice channel and agent name

- Select the **eye icon**, your CCP status will change automatically to **Monitoring**.

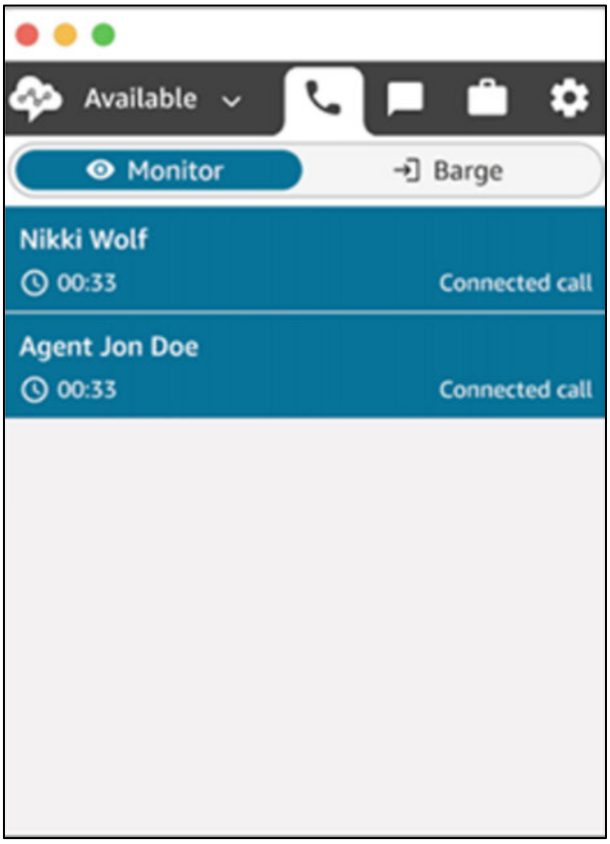


Figure 13 Image of the Contact Control Panel showing Monitor status and call details of the call being monitored

- From your CCP select the **Barge icon**.

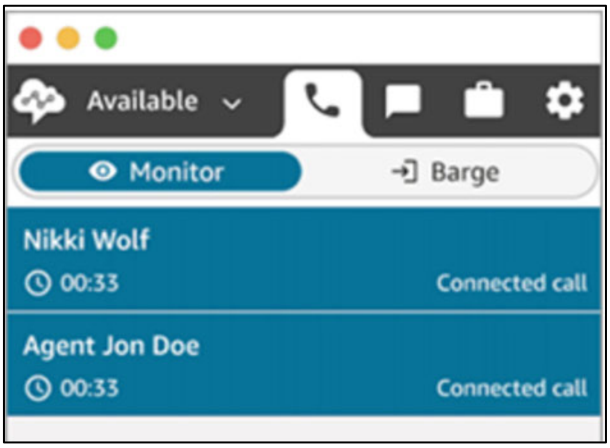


Figure 14 Image of the Contact Control Panel showing Monitor status and the Barge icon above call details

- You can enable barge and move between the **Monitor** and **Barge** states.
- To leave the call or stop monitoring the call, select **End call** on your CCP.

8 How to barge into webchat

A new feature has been added to webchat 2.0 that allows team leaders to barge into a live chat conversation between an enquirer and a Service Officer.

Note: When a Service Officer barges a chat their name will be appear as NDIA Team Leader to the enquirer.

To barge live chats with contacts:

- Log in to the **Amazon Connect admin website**.
- Open your **CCP**.
- Select **Analytics and optimization, Real-time metrics, Agents** from the navigation menu.
- Choose the **eye icon** that appears next to the **Chat channel** of the agent that you want to monitor.

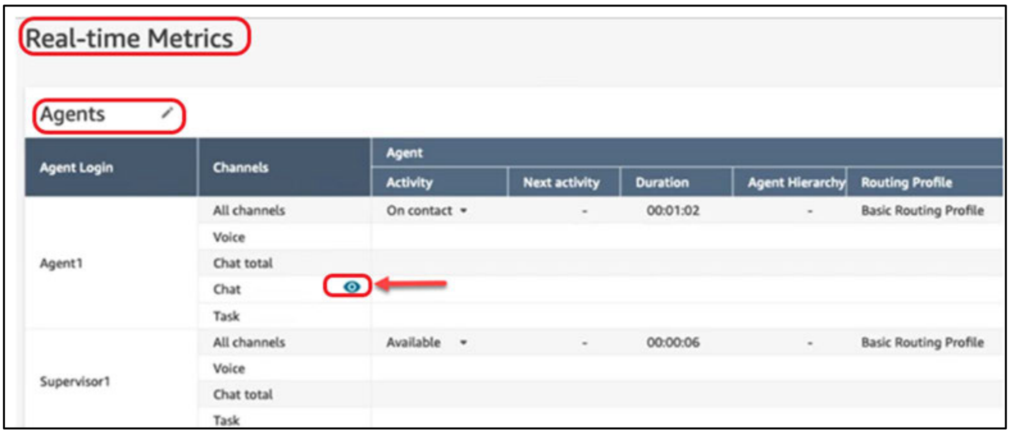
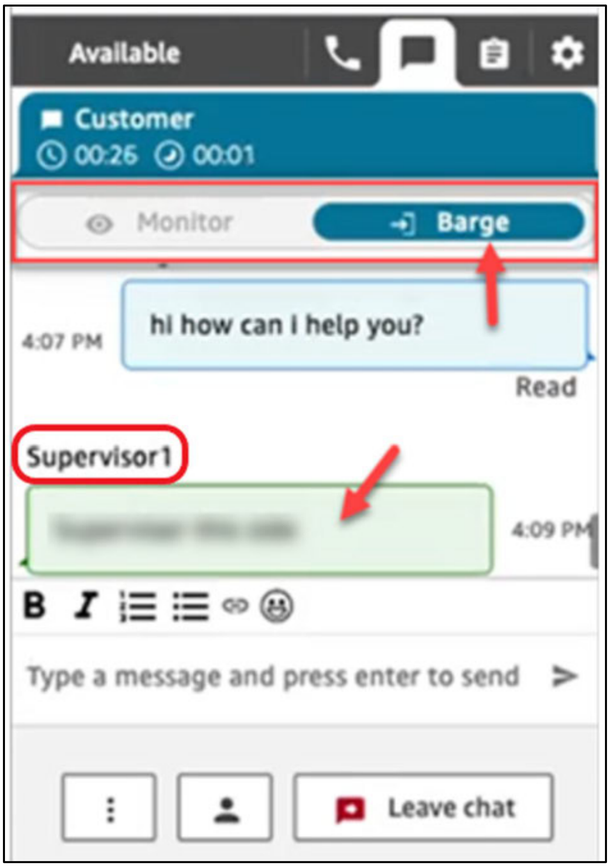


Figure 15 Real-time Metrics with eye icon on the chat channel

- From your CCP select the **Barge icon**.
- The Supervisor will be able to type a message in the chat.



- To leave the chat select **Leave chat.**

For further guidance refer to Amazon live voice and chat conversations (external)

9 How to view queue data

- On the **Real-time Metrics** page, display the Queues table.
- Select **View queue graphs** from the dropdown menu. The following image shows the dropdown menu for a queue named **test queue**.

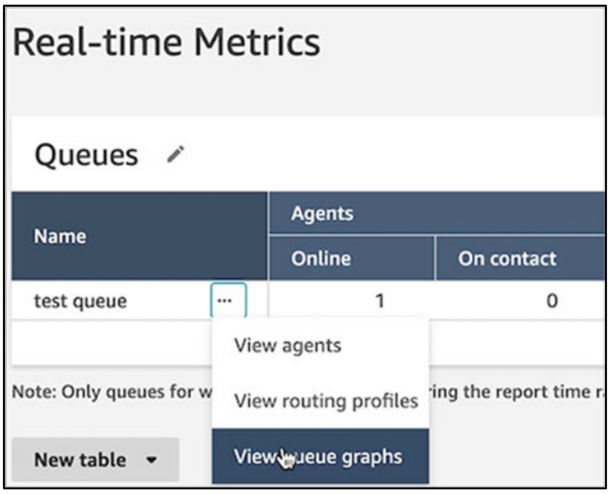


Figure 16 Image of the Queues screen in real time metrics showing the dropdown menu buttons and options to the right of the queue name. Highlight on View queue graphs

- After you select **View queue graphs**, you are directed to the queue visualization dashboard.
- The Queue dashboard automatically refreshes every 15 minutes. You can:
    - Configure a time range of up to 24 hours.
    - Select the channel of your choice.
    - Customize the service level thresholds.
- The following image shows an example Queue dashboard. It displays a graph of service level data for the queue. **Time range** is set to **Previous 24 hours to future 24 hours**. **Channel** is set to **All channels**. **Service level** is set to **60 seconds**.

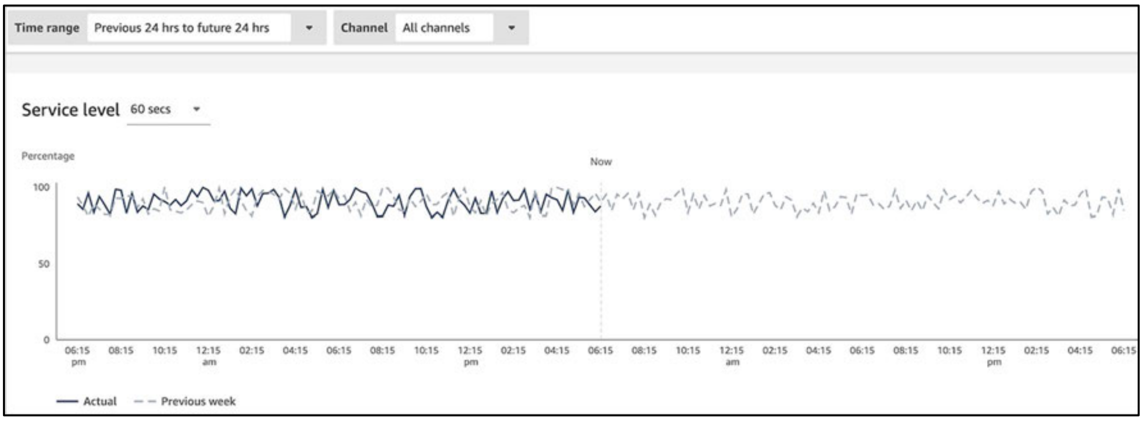


Figure 17 Image of a graph of service level data for a queue across time range. Graph displays percentage, time and a line between data points

10 How to use Real-time Metrics Reports

Real-time metric reports show real-time or near real time metric information about your NCC Service Officer's activity status in you team.

To create a real-time metric report, you need to:

- Log in to Amazon Connect via your My Apps (microsoft.com) and select the **Amazon Connect: NCC Production tile**.
- Select **Analytics and optimisation**, Real time metrics.
- Select one of the following report type,
    - **Queues**
    - **Agents**
    - **Routing profiles**
- You can add multiple report types to the one report by selecting **New table and selecting another report type.**
- **To customise the report select the gear icon from the table.**
- Select the **Time Range tab** and input the date and time range required for the report.
- To filter data in your report, select the **Filter tab** and select the report types required. The available filters depend on the report type. The following are the possible filters:
    - **Agents -** Includes data only for the agents that you select from **Include**.
    - **Agent Hierarchies -** Includes data only for the agent hierarchies that you select from **Include**.
    - **Queues -** Includes data only for the queues that you select from **Include**.
    - **Routing profiles -** Includes data only for the routing profiles that you select from **Include.**
- Select the **Metric tab** and choose the metrics and fields to include in the report.
- Select Apply.
- To save your report for future reference, select **Save**, provide a name for the report and then select **Save**.

To view your saved real-time metrics reports, choose **Analytics and optimization**, **saved reports**, and then choose the **Real-time metrics** tab.

> There's no limit to the number of tables you can add, but you might start experiencing performance issues if you add a lot of them.

11 How to listen to call recordings

NCC Team Leaders can review past calls between agents and callers. A call is recorded only when the contact is connected to a NCC Service Officer. If the call is transferred externally, the call recording stops when the NCC Service Officer leaves the call. drops from the call.

To listen to a call recording you need to:

- Select **Analytics and optimisation** and from the menu select **Contact Search.**
- Filter the list of contact by date, agent login, phone number or other criteria and select **Search**.
- A list of calls based on your filtered criteria will display.
- To listen to the call, select the **Play icon** under recording/Transcript Colum.

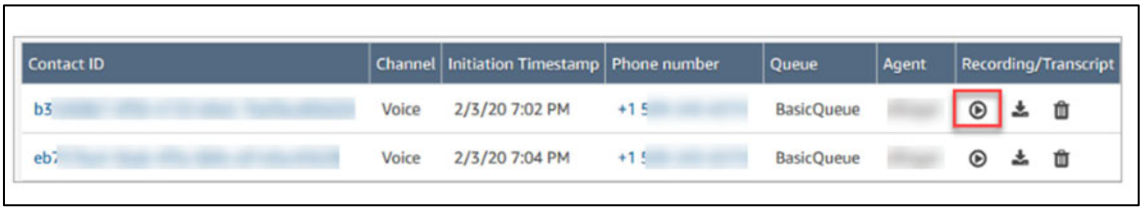


Figure 18 Image of the call recording results for a Contact Search highlighting the play icon to the right of the screen

To pause, rewind or fast forward a call recording you will need to:

- Select contact ID hyperlink displayed in blue in the Contact ID column.

Figure 19 Image of the call recording results for a Contact Search highlighting the blue hyperlink under Contact ID, with a cross on the play icon.

- A contact record page will display that have more controls to navigate the recording as shown below.

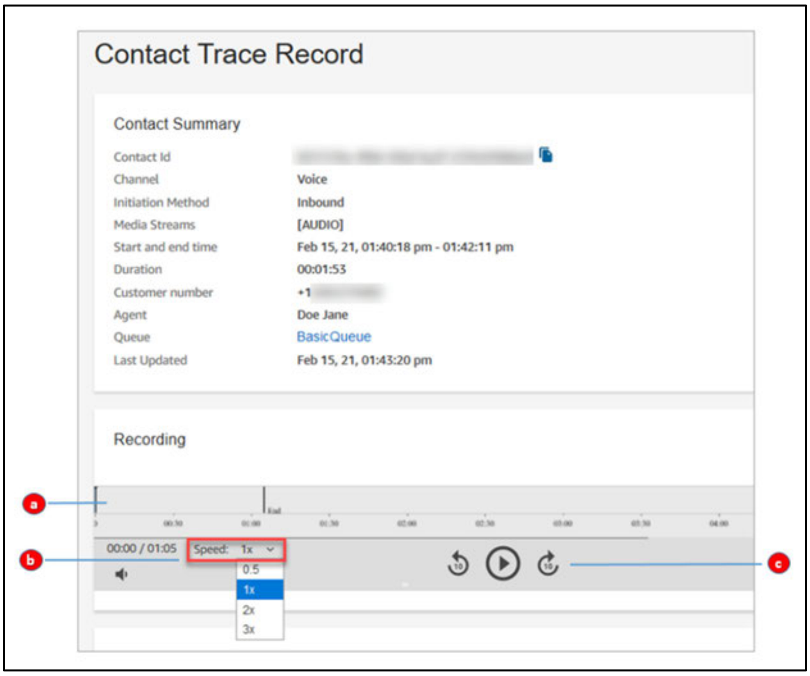


Figure 20 Image of the Contact Trace Record page which features audio controls including pause, rewind, skip, play speed

NOTE: If you choose the play icon for a transcript, it appears, as shown below:

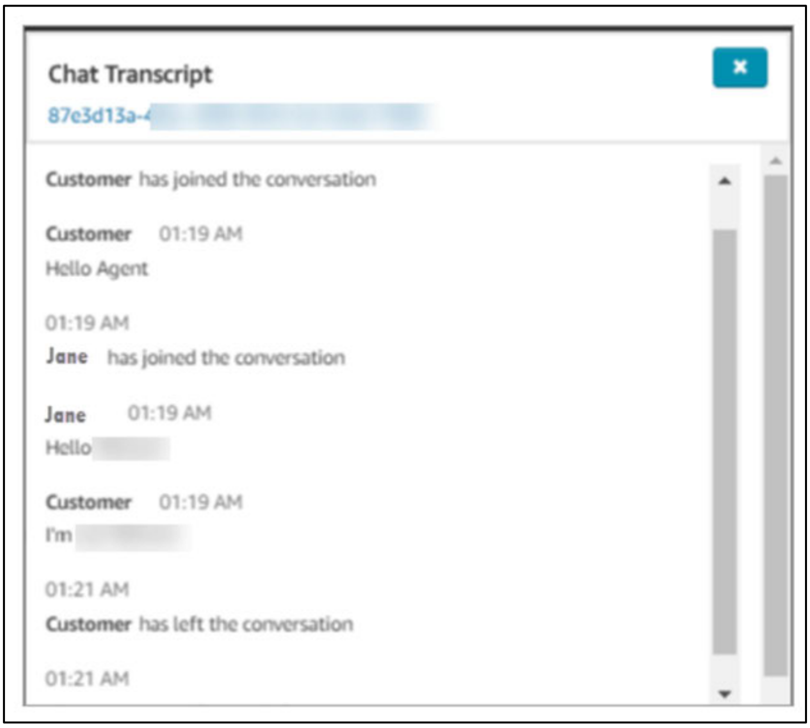


Figure 21 Image of the call transcript for a Contact

12 Further information

12.1 Please refer to:

- Amazon Connect App Access Request Process TL
- NCC OPERATIONAL GUIDELINES
- Amazon live voice and chat conversations (external)

13 Document owner and approver

Director, Support and Communications, Contact Centre Branch

14 Feedback

If you have any feedback about this procedure, please refer to your NCC Team Leader.

- **NCC Service Officers (NCC SOs)** please send your feedback to your NCC Team Leader. Your Team Leader may have an answer to your question or have information to share with you to resolve your questions and feedback.
- **NCC Team Leaders (NCC TLs)** please review the feedback from NCC SOs and provide advice, information and resolve questions where possible. NCC TLs can request new or updated NCC Guidance Resources and assistance using the relevant form on the National Contact Centre Service Desk on the intranet.

Amazon Connect Telephony Service Officer Guidance KA

NCC PACE Knowledge Management Portal

Exported on 2024-12-03 21:52:30

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- What is Amazon Connect
- How to log into Amazon Connect
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2 Procedure

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- How to use wrap codes
- How to end a call
- How to make an outbound call
- How to disable call recordings
- How to log out

Use this link to navigate back to KNOWA 2.0 home page.

S47E (d) - Certain Operations of agencies KNOWA 2.0 Home page

Search here to find NCC knowledge articles and guidance.Search

2.1 To be used by NCC.

This article helps you to:

- Understand what is Amazon Connect.
- How to use Amazon Connect when managing telephony enquiries.

Suggested Scripting Guidance Resource
Amazon Connect Telephony Responses QRG provides suggested scripting, to assist NCC Service Officer in providing effective responses when handling telephony enquiries.

Using Wrap Codes in Amazon
NCC Service Officers must select the wrap code and press 'Submit' within five minutes of starting After Call Work (ACW) timer. The disposition/wrap code selection screen will become inaccessible after 5 minutes in ACW.
To prevent this, NCC Service Officers should choose the wrap code **before** completing other after call work.
To ensure the wrap code is recorded successfully in the system, it is important to click 'Submit' after selecting the code.

3 What is Amazon Connect

Amazon Connect is an Amazon Web Services (AWS) used in contact centres that enables customer service officers to respond to phone calls or chat inquiries from callers.

4 How to log into Amazon Connect

4.1 To log into Amazon Connect

- Navigate to [My Apps (microsoft.com)]
- Select the **Amazon Connect: NCC Production** tile.

Figure 1 Image of Amazon Connect tile

- This selection will automatically launch the **Amazon Connect Dashboard**.
- Select **Agent Workspace.**
- No username or password is required to log in to Amazon Connect.

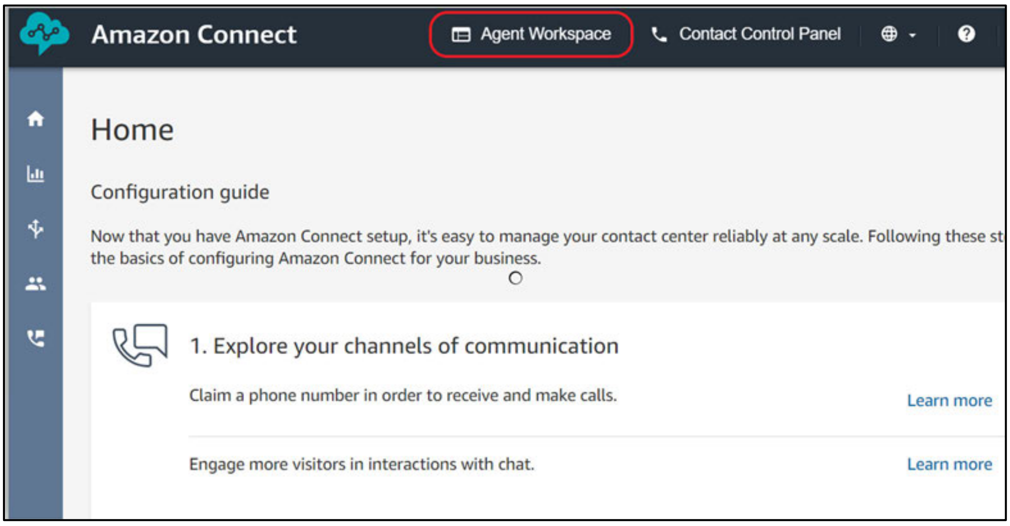


Figure 2 Image of Amazon Connect home page highlighting the Agent Workspace button at the top of the page

- The **Agent Workspace** screen will display in a new window.

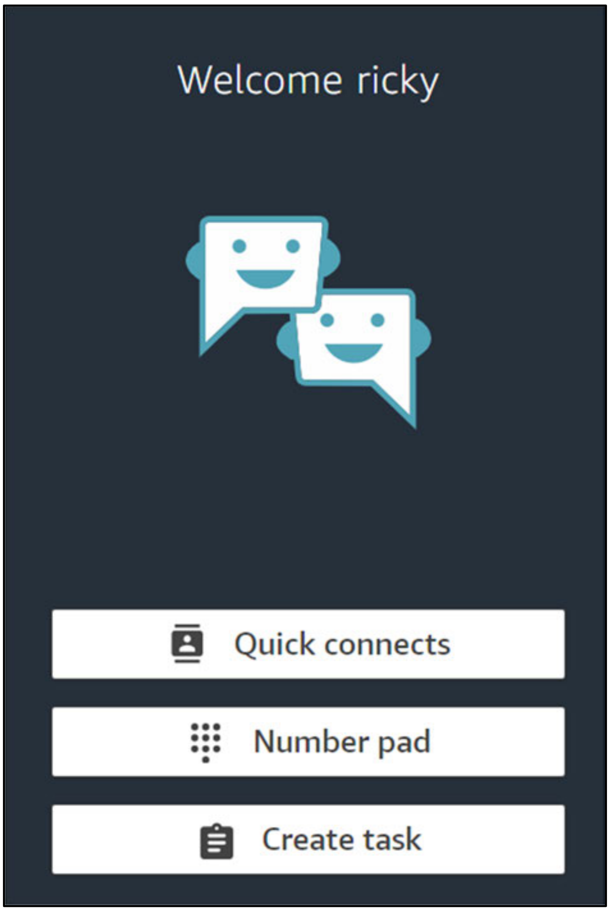


Figure 3 Image of the bottom left section of the Amazon Connect Agent Workspace

5 Amazon Connect work statuses

Amazon Connect work statuses are important and determine the availability for enquiries and adherence to roster.

When ready to handle phone enquiries, NCC Service Officers will need to set their work status to **Inbound Telephony.**

5.1 How to manage and change status

- Select the small **downward arrow** on the top left bar.

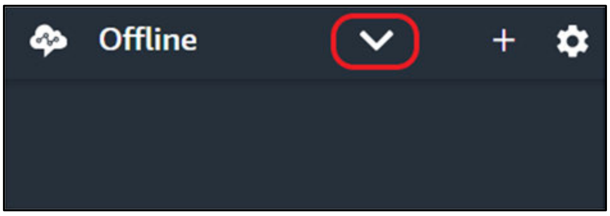


Figure 4 Image of the top left section of the Agent Workspace highlighting the downward arrow

- Select **Work Status** from the drop-down menu.

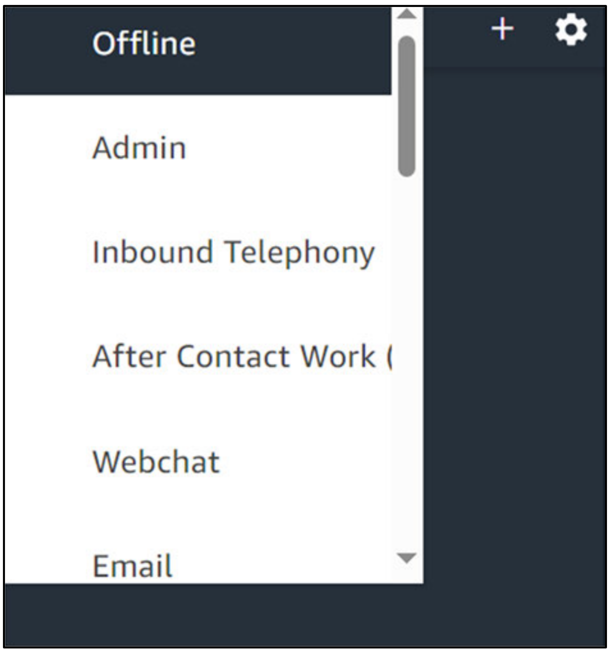


Figure 5 Image of the drop down menu showing available statuses in the Amazon Connect Agent Workspace

5.2 How to change status during a call

NCC Service Officers can use the **Next status** feature to pause new calls being routed, while completing the current enquiries.

- Select the work status using the dropdown, such as Lunch.
- Next status: Lunch will display, and no new contacts will be routed.
- Once the current phone call ends, select the Wrap up Code as usual.
- The work status will then automatically change to Lunch.

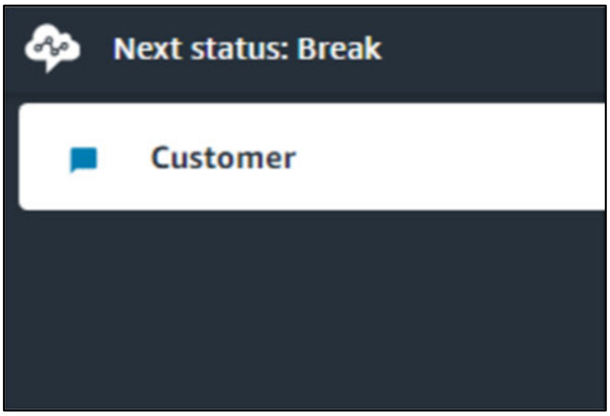


Figure 6 Image of the status field displaying Next status Break

6 How to accept a call

- Calls will be **automatically** accepted when NCC Service Officer's AWS work status is set to **Inbound Telephony.**
- When a call is being routed, it will appear on the left-hand side of the screen.

6.1 How to transfer call to survey

Before ending the call, provide the caller with the case number and ask if they wish to be transferred to the survey.

Suggested Script

Start Quote Icon Thanks for calling NDIS. Your case number is xx. Now, I'll put you through to a quick survey. If you don't want to do the survey, it's okay to hang up. End Quote Icon If they **do not** wish to complete the survey, thank the caller and select **End Call**. Complete the wrap up code and clear contact to be ready for the next call.

If they **do**, follow the below steps to transfer caller to survey.

- Select the **Quick connects** button.

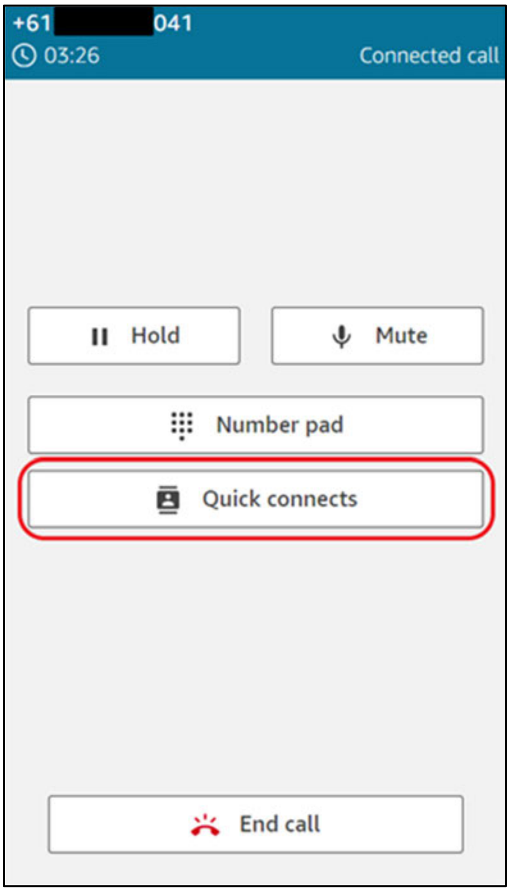


Figure 7 Screenshot of Amazon Connect with Quick connects circled

- The Quick connects screen will display.
- Search for the **NDIA Post Call Survey.**

Figure 8 image of ndia post call survey queue

- Double click to select the survey queue.
- Select the **Join** button, complete this step as soon as available so the caller can hear the instructions.

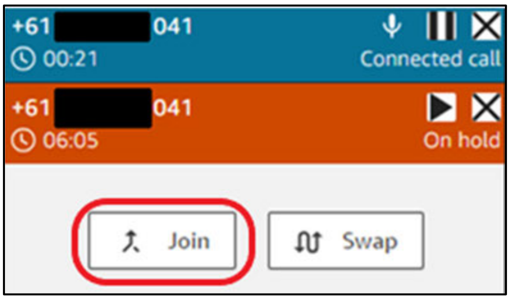


Figure 9 Screenshot of Amazon Connect showing two lines connected. The second line shows the paise button being circled. The first line is on hold, the second is not on hold.

- Both calls will turn blue and display Connected call.

Figure 10 Screenshot of Amazon Connect showing two lines connected, and both lines not on hold. The close contact button is circled at the bottom of the screenshot.

- Once the calls are connected, select **End Call** to end the call.

7 How to use wrap codes

Wrap codes also known as **disposition codes**, indicates the nature of the enquiry and are part of the **After Call Work (ACW)** activities.

A wrap code must be assigned at the end of every phone enquiry. Please refer to the **List of wrap codes** in Amazon Connect Wrap Codes QRG.

7.1 How to assign a wrap code after call

- NCC Service Officers must select the wrap code and press 'Submit' within five minutes of starting After Call Work (ACW) timer. The disposition/wrap code selection screen will become inaccessible after 5 minutes in ACW.
- To prevent this, NCC Service Officers should choose the wrap code **before** completing other after call work.
- To assign a wrap code to an inbound call, select the **After Call Work** button.

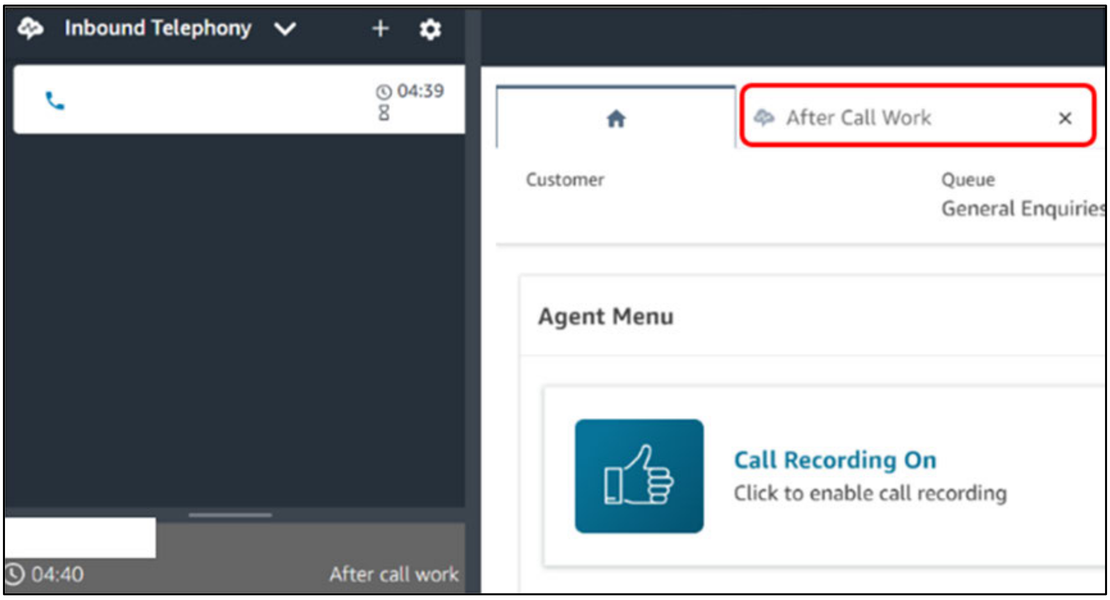


Figure 11 Image of AWS after call work screen

- Select the **wrap code** from the drop-down menu.
- Select **Submit.**
- Once the wrap code is submitted, ensure all actions related to the enquiry are completed on the record.

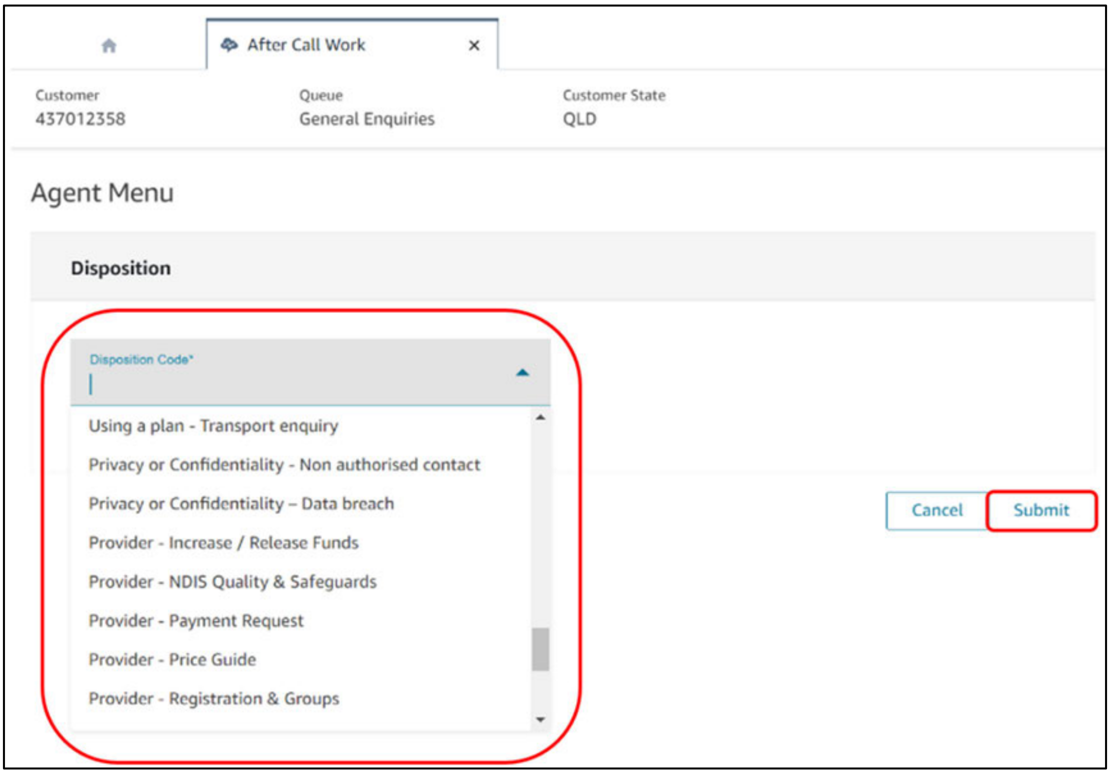


Figure 12 Image of AWS with wrap codes after call and submit button circled

- Select **Back to Home.**

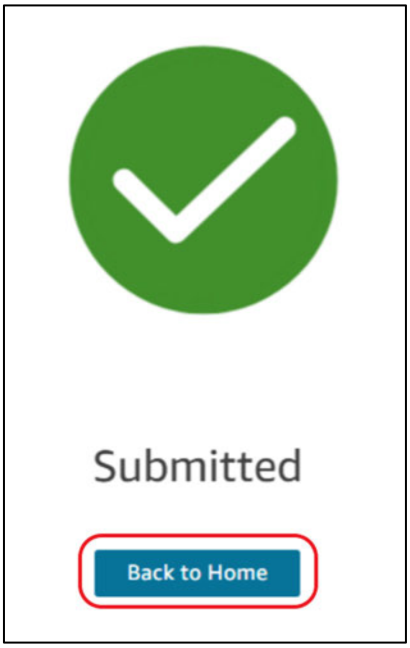


Figure 13 Image of Amazon Connect ACW submitted screen highlighting the Back to Home button at the bottom

8 How to end a call

The call must be ended after the conversation has finished with the caller.

- End the call by selecting the **End call** button.

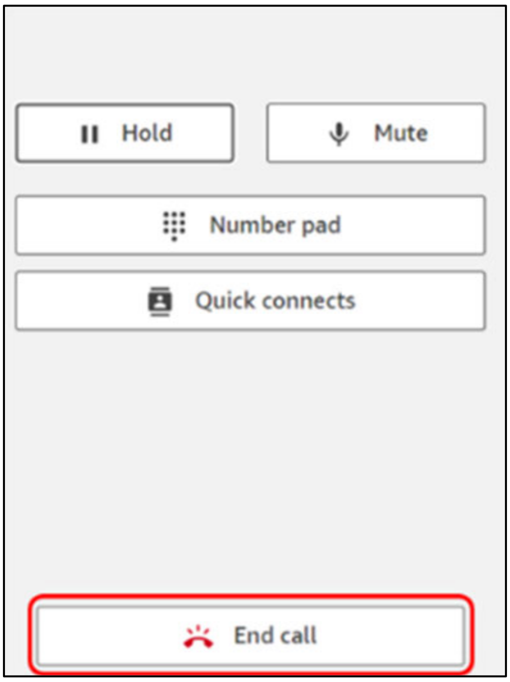


Figure 14 Image of dial number pad with end call button circled

- Complete the **After Call Work (ACW)** tasks, refer to How to use wrap codes for more information.
- Select **Clear contact.**
- Select **Close contact** to clear all previous contact information and to take the next call.

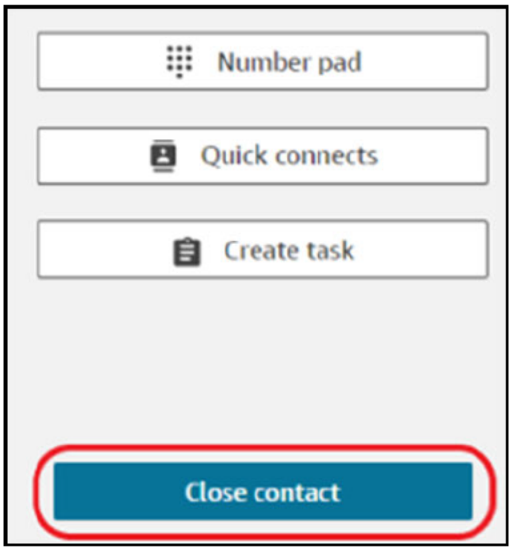


Figure 15 Image of AWS with close contact button circled

Telephony responses QRG
Amazon Connect Telephony Responses QRG provides a list of suggested scripting, to assist NCC Service Officer in providing effective responses when handling telephony enquiries.

9 How to make an outbound call

At times it will be required to make an outbound call to confirm, gather or provide information to a caller.

- Select the **Number pad**.

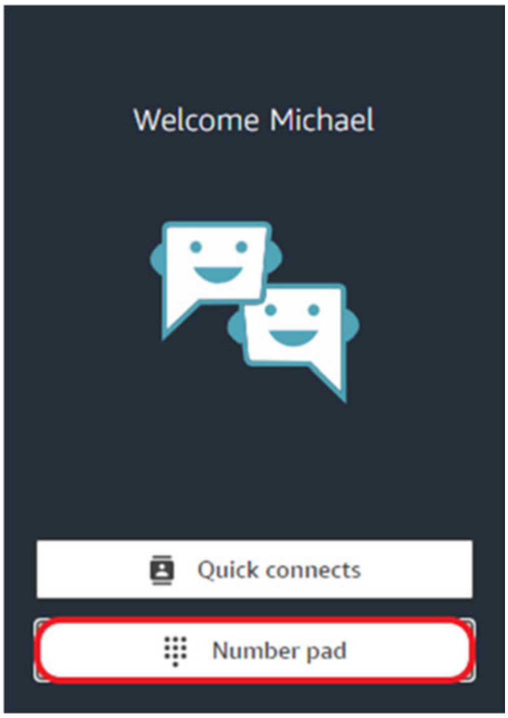


Figure 16 Image of number pad in amazon connect

- Enter the **10-digit phone number**.
- Select **Call**.

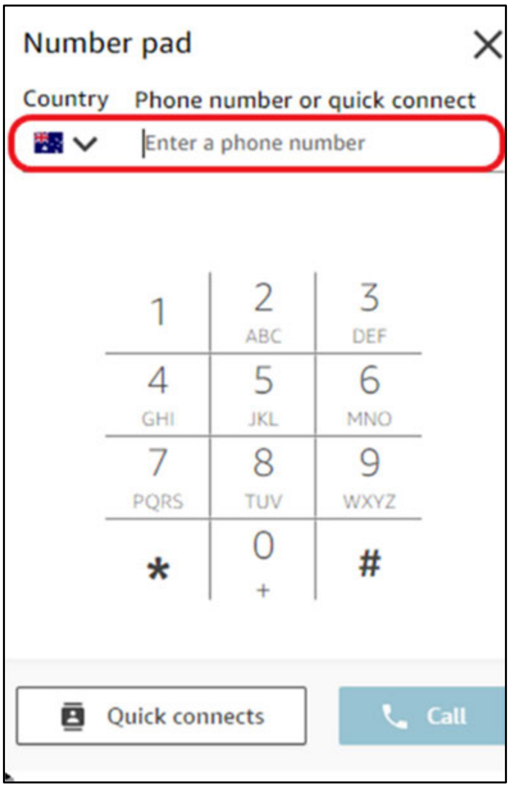


Figure 17 Image of number pad with enter phone number option circled

10 How to transfer a call to another queue or team leader

NCC Service Officers may be required to transfer the call or refer to an NCC Team Leader or another queue. When an enquirer wants the call to be escalated or transferred, the NCC Service Officer must follow the below steps. If it is an emergency situation, request urgent Team Leader call take over.

Refer to Amazon Connect Telephony Responses QRG for scripting guidance.

- Select the **Quick connects** button.

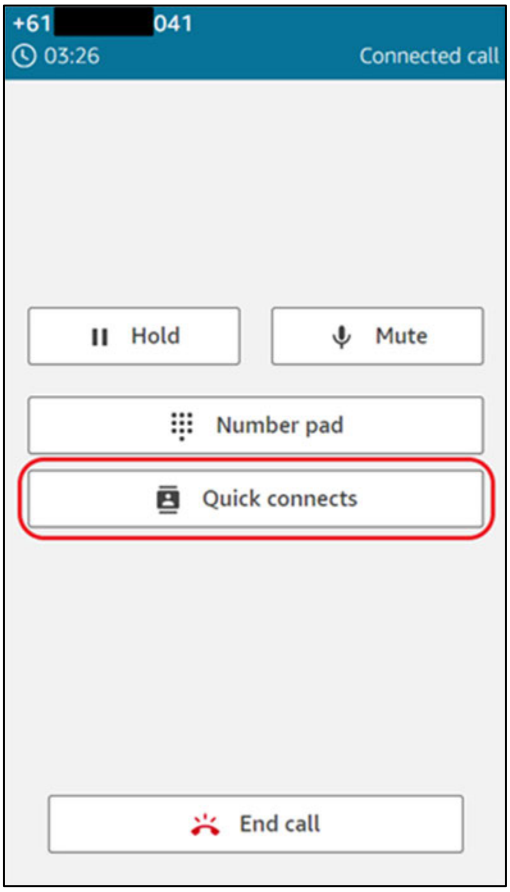
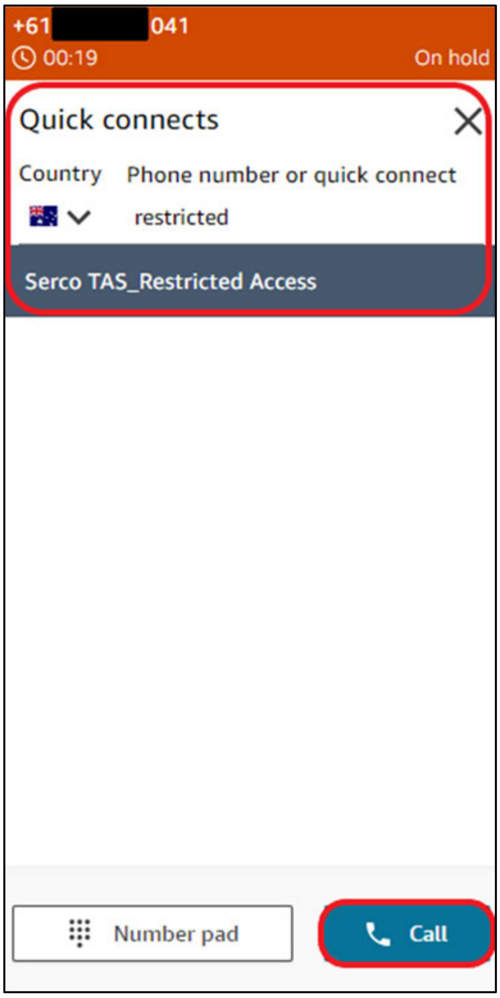


Figure 18 Screenshot of Amazon Connect with Quick connects circled

- The Quick connects screen will display.
- Search for the name of the queue or team leader.
- Select the correct contact to transfer the call to.
- Select the **Call** button at the bottom of the screen.



- Click **Join** to merge the call.
- To place either line on **hold (II Symbol),** make sure to select the **pause button**.
- Use **hold** on the call to switch lines.

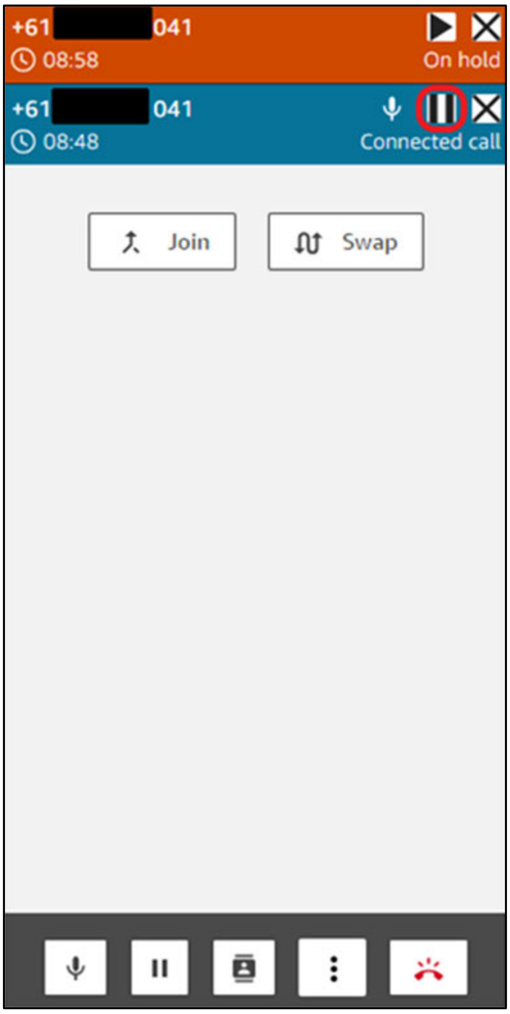


Figure 19 Screenshot of Amazon Connect showing two lines connected. The second line shows the pause button being circled.

- Select **Join** to successfully merge the calls.

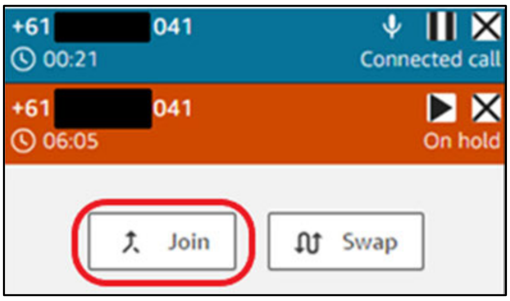


Figure 20 Screenshot of Amazon Connect showing two lines connected. The second line shows the paise button being circled. The first line is on hold, the second is not on hold.

- Once the call has been successfully merged,

- Exit the call by selecting the **End call** button at the bottom of the softphone.

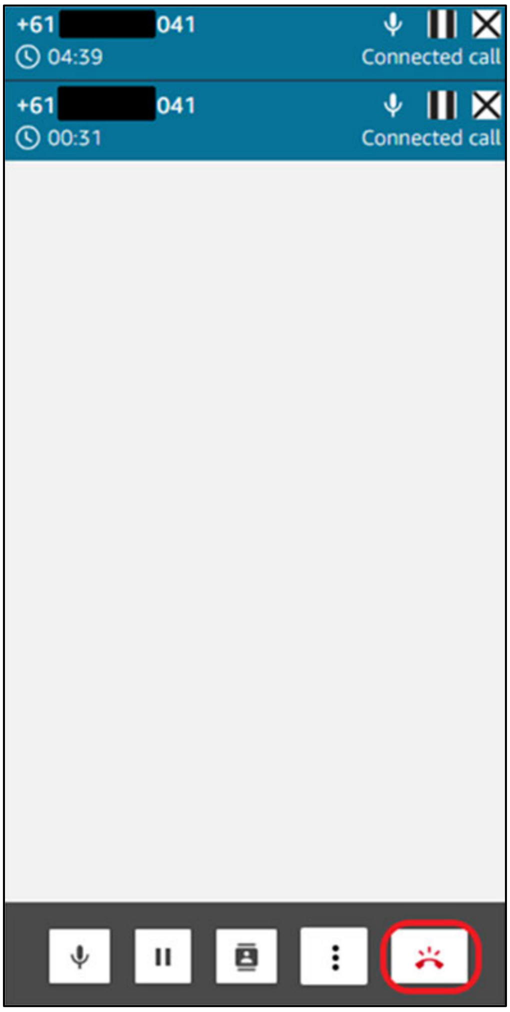


Figure 21 Screenshot of Amazon Connect showing two lines connected, and both lines not on hold. The close contact button is circled at the bottom of the screenshot.

11 How to disable call recordings

NCC Service officers may have a caller who has asked for their call not to be recorded, please disable the call recording in Amazon Connect.

- To disable a call recording in Amazon Connect, Select **Call Recording Off**.

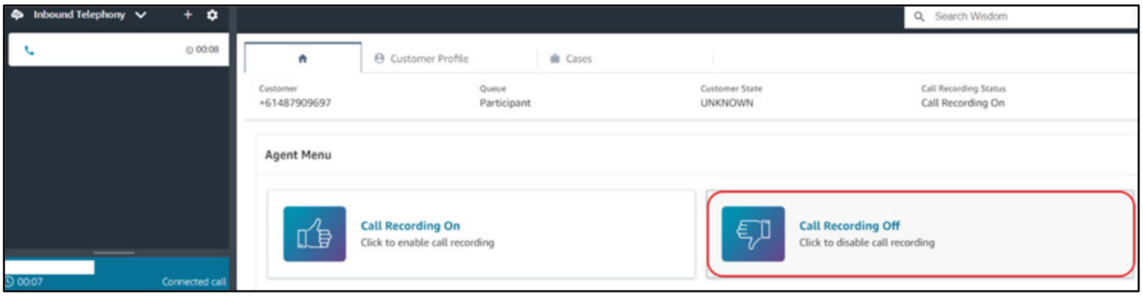


Figure 22 Image of call recording off screen

12 How to log out

At the end of the shift, it is important to log off for the day by selecting the correct status:

- Set agent status to **Offline**.
- Select the **Settings** button.

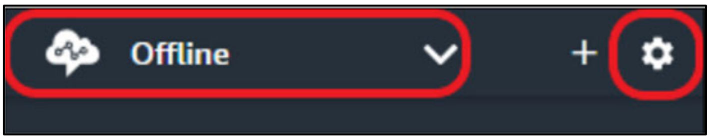


Figure 23 Image of offline status

- Select **Logout**.

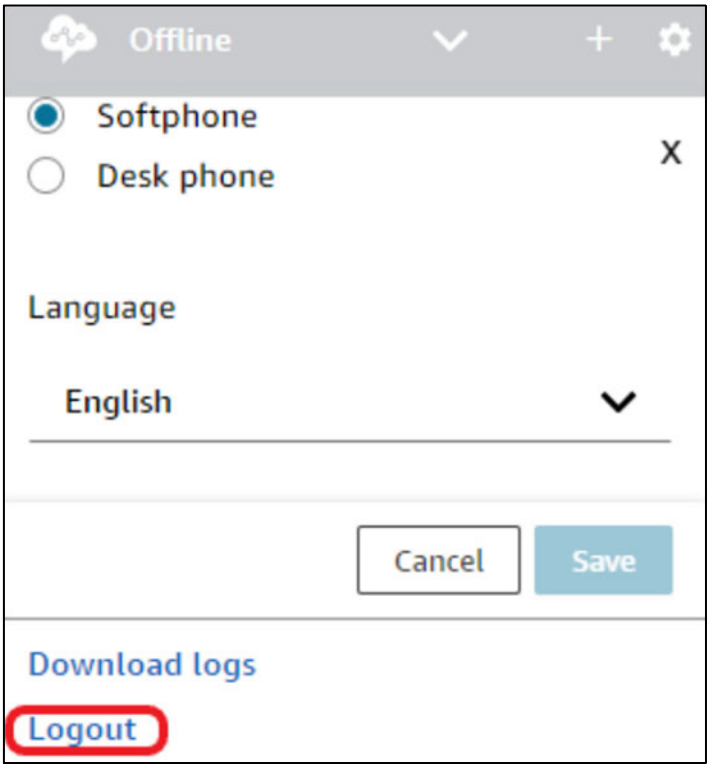


Figure 24 Image of logout screen in AWS

13 Further information

13.1 Please refer to:

- Amazon Connect Telephony Responses QRG
- Amazon Connect Wrap Codes QRG
- Amazon Connect Webchat Guidance KA
- Archived Amazon Webchat Canned Responses QRG
- Amazon Connect Team Leader Guidance KA
- NCC OPERATIONAL GUIDELINES

14 Document owner and approver

Director, Support and Communications, National Contact Centre Branch

15 Feedback

If you have any feedback about this procedure, please refer to your NCC Team Leader.

NCC Team Leaders Only - Please review the feedback to determine if further support is required by the Contact Centre Branch.
If feedback is deemed appropriate, complete the email template request for new or updated resources and send through the request to NDIScallcentre@ndis.gov.au.

Call Handling Basics KA

NCC PACE Knowledge Management Portal

Exported on 2024-12-03 21:53:17

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- Managing my communication
- Managing challenging conversations
- Enquiry resolution and referral
- Enquiry note template

Use this link to navigate back to KNOWA 2.0 home page.

S47E (d) - Certain Operations of agencies KNOWA 2.0 Home page

Search here to find NCC knowledge articles and guidance.Search

1 To be used by NCC.

This article assists you to:

- Prepare for call handling and provides support materials around Key Call Handling Processes.
- Understand information on the types of challenging calls you may experience, techniques and tips for dealing with challenging calls, and examples of effective responses to help deal with challenging situations.
- Understand inbound call sequence and identify when an enquiry is a priority enquiry that requires escalation.

2 Before you start

- Prepare for the call.
- Support the enquirers communication needs.
- Check all alerts on a person account.

3 Protecting persons privacy

The NDIA is bound by the requirements of federal law, including the Privacy Act 1988 (Commonwealth) (Privacy Act) and the National Disability Insurance Scheme Act 2013 (NDIS Act), in its handling of personal information.

Every NCC Service Officer is required at all times to comply with the NDIS Act and the Privacy Act in the collection, use, storage and disclosure of personal information.

You must take all required steps to make sure that no-one outside the NDIA can access information held about someone, without that person's consent, unless that access is authorised or required under law.

The NDIA's Privacy policy and the NDIS Our Guideline - Your Privacy and Information requires every NCC Service Officer to respect and protect the privacy of everyone who contact the NCC, this includes new prospective participants, prospective transitioning participants, participants, providers, employees, contractors and community partners.

You should be familiar with the above policy and guidelines to make sure your collection, use and disclosure of personal information complies with your statutory obligations and NDIA policy.

You must deliver NCC services according to the Consent KA.

You must only ever discuss, disclose, collect, record or hold a person's personal information after you have confirmed or verified the person's identity and checked their authorisation in the NDIS Business System (PACE).

Unauthorised access, use or disclosure of protected information is an offence and carries a penalty of up to two years imprisonment.

The NDIS Privacy page describes what kinds of personal information that you may have to collect, use and record:

- Name, contact details date of birth and age.
- Gender, details about participants' physical or mental health, including disabilities.
- Information about participants' support requirements.
- Details of guardians and nominees, including names, addresses and contact details.
- Centrelink Customer Reference Number (CRN).
- Details of feedback or complaints about services provided by us.
- Bank account details.
- Employee records.

3.1 Request to speak with or wants information about NDIA staff member/s

Person who is a family member, friend or has another type of relationship and wants to speak with or get information about a NDIA staff member/s.

- Assess the person's enquiry type and resolve or refer
- Advise:

Start Quote Icon Thank you for your call. Unfortunately, we are unable to provide information about anyone who may or may not be a staff member in the NDIS. I am sure you can understand and appreciate this. End Quote Icon

4 Prepare to handle a call

You can use this **checklist** to prepare for call handling but also can use this for handling non-telephony processing work as well.

- Switch your mobile and landline phones to silent to ensure professional service delivery.
- Set up equipment - head set and computer.
- Open up and minimise your key sources of information and instructions and business systems including:
-
    - KNOWA 2.0 - NCC Knowledge Management Portal
    - NDIS Business System (PACE)
    - NDIS Website
    - Check recent bulletin notices on BULLETIN NOTICE BOARD NCC KNOWA 2.0
    - Check notices and any IT updates on NDIA home intranet page
- Set-up your sticky notes or your notepad to be able to save, copy and paste important information to enquiry notes.
- Use a note to copy the approved NCC greeting and have it close by "Thank you for calling the NDIA. This is <**your name**> speaking, how can I help you?"

5 NCC Service Officer call flow

5.1 Welcome person and introduce yourself

- Answer the call with approved NCC greeting:

Start Quote Icon Thank you for calling the NDIS. This is <**your name**> speaking, how can I help you? End Quote Icon

5.2 Use the person's preferred communication method

Person with a disability need to be supported in all their dealings and contact with the NCC and the NDIA. This is essential so that person's capacity to exercise choice and control is maximised in a way that is appropriate to their circumstances and cultural needs. It is important that NCC Service Officers communicate with the person in the way that they prefer. Refer to Assist person with their preferred communication method KA for more information.

5.3 Connect and Support

- Build rapport using their first name.
- Acknowledge their enquiry and concerns, use the following scripts where possible:
    - I hear your concern, now I can look into that for you.
    - What I will do is

5.4 Verify identity or confirm authority

- Advise the person (prospective participant, participant, third party or provider):

Start Quote Icon Before we can proceed, I need to ask you a couple of questions as a privacy requirement. End Quote Icon

- Refer to Consent KA for work instructions around how to verify a person's authority and complete a three (3) point security check with the caller to confirm they are the person with authority before disclosing personal information.

5.5 Identify and confirm person's needs/enquiry

- Use effective questioning, probing questions and active listening techniques.
- Check recent enquiry notes.
- Use NCC resources and PACE to investigate and carry out trouble-shooting and problem-solving processes.

5.6 Hold Protocols

Place a person on hold when you need to source information and instructions from your NCC resources, carry out a warm transfer or when you are doing actions on the PACE. You are to maintain a level of professionalism and show gratitude to the person for taking their time whilst you investigate and resolve their enquiry.

- Ask the person's permission for you to place them on hold, explain why and wait for the person to consent.
- Set a realistic timeframe and provide this to the person, for example, 3-5 minutes which shows them you are committed to delivering the best service for them and also gives you time to source information and instructions.
- Keep to the timeframe you have set and if you are going to take longer, go back to the person, give them an update and check that you still have their permission to be on hold.
- Let the person know what you will be doing whilst they are on hold. You can also pre-position any prolonged silences if you think you do not need to use the hold feature.
- Re-engage the person appropriately and thank them for holding and for their patience.

5.7 Provide Solution

- Give the person options on how you can resolve or refer their enquiry for resolution and options on the level and type of service assistance that can choose from.
- Check a person's PACE record to see their streaming level (internal information only) and if Agency managed or self-managed and any information in PACE to base any service options on.
- Present your solution in a clear and concise way.

5.8 Refer the enquiry for resolution

- Use all available NCC resources to resolve the enquiry before making a referral.
- Seek assistance from a Team Leader or a Floor Walker if you are unsure.
- Refer the enquiry using the Priority Enquiry KA.

5.9 Call Summary

- Document and record the enquiry using the enquiry notes template.
- Summarise the information provided, and actions to be taken.
- Ask the person if you have resolved their enquiry today?
- Ask the person if they would like a receipt number for this call today?
- Finish the conversation.

5.10 Wrap up

- Offer to transfer to the survey.
- Thank the person for calling the NDIA.

5.11 Terminating a call due to no response

When Service Officer's answer a call and have been immediately placed on hold the caller should be given adequate time to join the call.

- If the call is taken from the **Escalation/Support Queue** please wait **1 minute** before terminating the call.
- If the call is taken from any other line, please wait **30 seconds** before terminating the call.

NCC enquirer types

5.12 Person enquiring, applying and transitioning

- A prospective participant is a person who has made a valid access request and they are waiting to hear a decision on their application. They are a 'prospective participant' under the NDIS Act.

5.13 Participants

- A participant is a person who has been given an Access Met decision. They become a participant under the NDIS Act. This includes children aged 0-6 years.

5.14 Providers wanting to register and registered

- Individuals or organisations who want to register to become a registered NDIS provider.
- NDIS registered providers who deliver a support or product to a participant of the NDIS.
- Non-registered providers who provide supports to self-managed participants.

5.15 Third party individuals and organisations

- An individual, service provider, group or organisation contacting the NCC who is not the NDIS record holder themselves are called third parties.
- These callers must have the authority to enquire or act on behalf of a NDIS participant. It is extremely important information is not exchanged with a third party without the consent of the participant, nominee, child representative or legal guardian. You must confirm their authority and do the NCC 3 point security check with them using the Consent KA.

5.16 Offering service level choices

You are to make sure that wherever possible, you are giving callers the choices about the level and type of service assistance they can access when contacting the NCC. Your service level may range from assisting a person to do a Verbal Access Request to providing contact information about an NDIS local office. Person with disability make up your largest enquirer type. You have diverse and different enquirer groups.

- Some participants are self-managing their plans, other participants have plan managers or have plans managed by the NDIA.

- Many registered providers are individuals as well as medium to large service organisations.
- Assessing how much assistance a person may want from you, will include using:
- Checking a person's PACE record to see their streaming level (internal information only) and any information in enquiry notes, and
- Effective questioning, for example:

Start Quote Icon

I can you walk through your plan letter with you now over the phone, or alternatively I can direct you to useful explanations on our website so you can look over it at a later time?
End Quote Icon

Service delivery by the NCC is carried out using first call resolution and referral. The NCC does troubleshooting and problem-solving with the callers. A key NCC service is assisting people to do a Telephone Access Request (TAR) to apply for the NDIS.

5.17 Streaming level for NCC servicing (internal process)

NDIS participants entering the NDIS have diverse circumstances and different levels of need and knowledge as they enter the NDIS and use their supports and services. Streaming is an internal agency process (not for public knowledge), used by the NDIA to determine the pathway a person will follow for planning and the level of support they need with their plan. You use streaming level information for NCC disclose the streaming level service delivery but do not to the person.

There are five service streams:

- General.
- Supported.
- Intensive.
- Super Intensive.
- Complex.

Checking a person's streaming level in the NDIA Business System on the Participant Overview screen, gives you more information about person types and the possible level and type of assistance a person may need. This also provides you with details about whether the person has support to manage their plan from a Local Area Coordinator (LAC), early childhood partner, Support Coordinator or is Agency managed. You must always check a person's streaming level before you do an enquiry referral to decide how or if the referral needs to be sent.

A person streamed as general or supported will most likely have support from a LAC to manage their plan. A person streamed as Intensive or Super Intensive may have a Support Coordinator or may be Agency managed through a planner at a NDIS region.

5.18 Communication preferences, language and relay call interpreters

You use the NCC Assist person with their preferred communication method KA to understand How to request, arrange and work with CALD language interpreters and the National Relay Service.

6 Procedure

6.1 To complete the PACE Steps:

- Navigate to the relevant account for historical information and activities to assist with the enquiry.
- Follow the PACE steps below to complete the enquiry.
- If further guidance is required to resolve the enquiry, refer to the relevant NCC guidance resources.

7 Key call handling processes

Please note that the only approved transfer method used by the NCC is the announced warm transfer method as detailed out below. Unannounced cold transfers are not an approved transfer method and must not be used unless clearly detailed in approved instructions.

Use NCC PACE Enquiry Categorisation Guide to select and follow steps for the correct case categorisation when resolving or triaging an enquiry in PACE.

7.1 Warm transfer to NDIA staff and partners

- Gather the following information from the person before doing the warm transfer:
  - Person's first and last name.
  - Participant's first and last name if different to caller.
  - Person's phone number (including area code).
  - Participant's NDIS number (if not available ask for full date of birth).
  - Provider's registration number.
  - Reason for the person's call.
- Advise the person:
  - You will try to contact the appropriate NDIA area or staff person to further help with their enquiry.
  - If you are unable to contact the area, then you can take a message and send it to the area.
  - You will need to place them on hold whilst you try to make contact.

7.2 Calls including a third party

When a caller passes the phone to a third party or dials in a third party NCC must:

- Complete VOI for the person giving consent as per the Consent KA.
- Inform the third party that calls are recorded for quality and training purposes.

8 Handling a call that has dropped out or disconnected

Calls may drop out during a conversation, while attempting a transfer or while a caller has been placed on hold.

If the call is disconnected, The NCC Service Officers are required to make one call attempt to re-contact with the person.

NCC Service Officer will need to carry out the following:

- Locate the person's phone number from the NDIA Business System (PACE) or from another approved information source (Amazon Connect).
- Call the person, if verification of identity (VOI) has been completed and the same person answers the phone, advise the caller that the call is being recorded.

Start Quote Icon Before we go into more detail can I please confirm your identity? I need to advise you that this call is being recorded for quality and coaching purposes, if you do not wish for the call to be recorded, please advise so now. End Quote Icon

- Continue the conversation using the relevant NCC SOP, Inbound or outbound script or other NCC resource to continue the conversation.
- If VOI has not been completed, call the person, carry out the VOI process and advise the caller that the call is being recorded.

Start Quote Icon Before we go into more detail can I please confirm your identity? I need to advise you that this call is being recorded for quality and coaching purposes, if you do not wish for the call to be recorded, please advise so now. End Quote Icon

- Continue the call using the relevant NCC SOP, Inbound or Outbound script or other NCC resource to continue the conversation.
- Record an Enquiry notes in the System and include notes covering:
    - Call dropped out, an outbound call was successful, VOI was established and add detailed actions/outcomes or;
    - Call dropped out, an outbound call was not successful, reason was no contact made or no confirmation of VOI and add detailed actions/outcomes if any.
- For further guidance refer to Outbound Call Script Guidance KA.

> If the disconnected call is an outbound call, then the call back attempt is counted as the first call attempt.

8.1 Person returning a call from NDIA

A person may contact the NCC as they have received a message or information by phone, email or SMS from the NDIA or as a result of NCC Outbound or Non-Telephony Processing work.

- Follow standard inbound call sequence and instructions.
- Check PACE enquiry notes for details of the original contact made and confirm these with the person.
- Determine the person's reason for contact and the enquiry type.
- Resolve or refer as instructed in case notes.
- Follow inbound scripts and instructions if able to resolve enquiry.

- Refer to Service Delivery and Performance.

If a call or email is about an existing case, you will need to link the current case to the existing parent case for the enquiry Archive - How to link enquiries to parent cases in PACE NCC

8.2 Repeat contact about an enquiry

A person may re-contact the NCC a number of times to follow-up a previously made enquiry that they say is unresolved. The person may be waiting for NDIA staff to contact them about a planning appointment date or an access application decision or related to another enquiry type.

- Ask the person about their previous conversation, date, enquiry type and outcomes.
- Check the person's PACE record and case notes.
- Advise person if you can see it is the same enquiry and there is a record of referral to Service Delivery or other service area:

Start Quote Icon I have checked our business system and can see you called on <date of person's contact. Your enquiry was about <enquiry type. The actions that have been taken for your enquiry are <details of actions completed to date and any in progress. End Quote Icon

- Check with the person if there is any new information or a change to their circumstances since they last called.
- Advise (relevant if no new information or change to their circumstances) that someone from the relevant NDIA service area will be in contact with them.
- Reassure the person the relevant NDIA service area has all their enquiry details for actioning.
- Advise (relevant if new information or change to their circumstances) that you will send a new referral to the NDIA service area with this new information.
- Update new information to existing referral if still open in PACE. If new information meets priority guidelines, refer to the NDIA service area detailing this information.
- Refer to Persistent and Repeat Callers KA to understand how to identify a repeat caller and how to handle the call including knowing when to escalate to a Team Leader or appropriate area when applicable.

9 Managing my communication

Your attitude to a person and the way that you manage your communication has a direct impact on whether the person's experience of your service delivery is a positive one or not. What you say and how you say it can affect a person's sense of security and wellbeing.

Managing and adapting your communication for different situations is critical to:

- Putting a person at ease.
- Building trust with a person.
- Efficiently resolving a person's enquiry.
- Giving a person confidence in the NCC, NDIS and NDIA.

It is important to continually ask yourself: **How do I need to be in this conversation?**

- Focus on the person not the disability.
- Be empathetic and respectful.
- Never make assumptions.
- Listen without judgement – be neutral, don't form opinions or take sides.
- Be understanding and responsive.
- Use 'person centred' language and say person with disability not a disabled person.
- Use positive respectful language. Avoid words like 'suffer' (implies negativity) and 'special needs' (labelling).
- Use the person's own language about their disability rather than medical or other language.

9.1 Managing your communication includes:

9.2 Using keywords

Listen and use the person's keywords in conversations and in your questions:

- Listen to the person's enquiry.
- Note down keywords.
- Use these keywords in your questions.

9.3 Effective questioning

9.4 Using open and closed questions

Your first question to a person calling the NCC should always be the open question **How can I help you?**

Throughout the conversation you will need to use open and closed questions to expertly guide the enquirer through the call conversation. You will ask open questions to gather detailed additional information or closed questions to either confirm your understanding or request specific information.

Benefits of open questions:

- Connects NCC and the enquiries together for you to gather information.
- Opportunity for person to give you a longer full answer and draw on their knowledge, opinions and feelings.
- Gives you more information and time to understand and resolve the person's enquiry.
- Begin with what, why, how, when.

Examples:

- Can you please tell me why you feel your plan doesn't meet your needs?
- What were you hoping to achieve from your planning meeting?
- How would you like this issue to be resolved?

Benefits of closed questions:

- Useful when you need a specific response or a simple "yes" or "no".

Examples:

- Can I please have your NDIS participant number?

Using clarifying questions

Benefits:

- Confirms your understanding is correct.
- Resolves any confusion or misunderstandings.
- Reassures the person that you are genuinely interested in them and what they need.

Examples:

- To help me fully understand, can you please repeat.
- That sounds very interesting, can you please give me more details?

Using probing questions

Asking probing questions is another way to find out more details.

Benefits:

- Gains clarification to ensure you have the whole story and that you understand it thoroughly.
- Draws detailed information from enquirer when they may be unsure or uncertain about the conversation.

Examples:

- To help me understand, can you please give me an example of what you are experiencing?
- Have you had a chance to look into other government and community supports that you might be eligible to receive, for example from the Commonwealth Department of Health?

9.4.1 Using leading Questions

Asking leading questions helps to manage the conversation to enquiry resolution, in a way that the person feels they have made choices along the way and with the outcome.

Benefits:

- Very useful for call conversation management.
- Can use assumptions in your questions to introduce information.

- Can suggest alternative approaches or processes to the person for their agreement.
- Gives you the opportunity to give the person a choice between options.

Examples:

- Was your myPlace portal not letting you update your bank details? (Assumes that the enquirer has already tried to update the details themselves.)
- Having such a personalised plan makes sure your plan is suited to you instead, which is so much easier don't you think? (Adds an alternative approach using a personal tone.)
- Shall we go ahead and look at the steps together for starting your access request? (More likely to get a positive response than "Do you want to go through the steps for requesting access"?)
- I can walk through your plan letter with you now over the phone, or alternatively I can help you find useful explanations on our website so you can look over it at a later time? (Gives them a choice both of which will resolve the enquiry.)

9.5 Active Listening

Active and effective listening is a very important communication technique that requires you to provide verbal feedback to the person to show them you are listening and understanding. Your enquirer needs to feel that you are fully concentrating on them and their needs, not just hearing what they are saying. At times a conversation may include a third party, interpreter or National Relay Officer and so your strong listening skills will be valuable here.

The NDIS is a new social insurance program, and it will be natural that some callers will not provide you with a clear enquiry type. It may take some time for the enquirer to tell you what they need. During the conversation, if a person is met with silence from you, they may feel like they are not being understood or that you are not listening at all.

9.6 Using Verbal Nods

Benefits:

- Are verbal signals and communication to replace non-verbal face to face listening.

Examples:

- I understand.
- I see.
- Yes.
- Okay.

9.7 Using mirroring

The mirroring technique builds a connection and rapport with the person. Where appropriate, you adopt the verbal behaviours of your enquirer, using the same words (keywords) or phrases.

Benefits:

- Can give the person the feeling they are talking with someone familiar and so the conversation is easier and more comfortable.

Examples:

- Mirror a person's tone of voice, rate of speech and word choice.

- Use friendly, neutral and respectful communication to show and guide the person to mirror your communication.

9.8 Avoiding jargon

Many of the technical terms used in the Agency are not part of wider Australian language. These words are called jargon and can be meaningless to others outside the Agency. It is best to avoid using them when communicating with external parties.

Examples:

- Delegate
- s48
- VOI
- CRM / PACE
- Wrap code

10 Managing challenging conversations

The NCC Handling Challenging Calls KA describes how you can use the HEAT de-escalation model, situations and scenarios that may take place within challenging conversations with the persons. For each stage or scenario there is suggested communication and phrases for you to use and the benefits of these.

10.1 Request for your name and location

You are not obliged to provide your full name/last name:

- Provide your first name and log on ID.
- Explain the log on ID identifies you.
- Do not provide last names or contact details of NCC staff, NDIS staff or partners.

Do not provide your office location:

- Advise you are part of a NDIA National Contact Centre.
- Advise you are located in Victoria.

10.2 Request to speak with team leader

If request is made at the start of the call:

- Clarify the reason with the person, use open and clarifying questions.
- Try to de-escalate the conversation.
- Try to resolve the enquiry.

If the request to speak with your Team Leader is due to the conversation escalating:

- Advise caller you will see if your Team Leader can take their call.
- Ask if you can place the caller on hold whilst you see if your Team Leader is available.
- Contact your team Leader by MS Teams or face to face.
- Locate another Team Leader if your own Team Leader is not available.
- Advise the Team Leader about the call.

Confirm the Team Leader can take the call and provide them with the following information:

- Person's record number if available.
- Person's name.
- Person's enquiry and/or concerns.
- Your actions to resolve.
- Reason why the conversation has escalated.
- Advise person:

Start Quote Icon Thank you <use person's name> for waiting. I now have a Team Leader on the line and their name is <Team Leader's first name only>. I will transfer your enquiry to them now, I will need to place you on hold for about <give estimate of time>. Thank you. End Quote Icon

- Transfer the call to Team Leader.

- Finalise your case notes in PACE.

10.3 Request for call recording

- Advise the person that a Freedom of Information (FOI) request to the NDIA is required.
- Provide person with information using instructions in under the **Freedom of Information request process** section of the NCC Service Officer Guidance page.

11 Enquiry resolution and referral

11.1 First contact resolution

This is your delivery of a complete service to the person where you handle and resolve their enquiry with no referral made. You are to resolve all enquiries that are in scope for the NCC. This means all enquiries that are within the full capacity and full responsibility of the NCC.

11.2 Enquiry referrals

Your NCC resources clearly instruct you when you are required to refer a person's enquiry to another NDIS business area (Service Delivery and Region, National or other). Requirement for an enquiry referral can be due to the urgency of the enquiry and/or the NCC not having Agency authorisation to resolve the enquiry.

There are NCC Standard Operating Procedures and other instructional resources for all known enquiry types.

There are two enquiry referral types - warm transfer and email.

Warm transfer by phone (internal) • Local Area Coordinators (LACs) • Internal phone advice services and helpdesks • For instructions go to Handling Challenging Calls KA
Warm transfer by phone (external) • National Safeguards and Quality Commission
Email referral using email templates: • PACE email referral • Email referral using Outlook
Enquiry referral types include by: • Email or within PACE • Phone warm transfer to Local Area Coordinators (LACs)

11.3 Priority enquiry Tier 2, 3 and 4

Priority enquiry referrals include Business As Usual (BAU) Tier 2 and Tier 3 levels of enquiries that are urgent and is used when the enquiry type is urgent and there is a risk as outlined in the NCC PACE Enquiry Categorisation Guide.

During the Covid-19 pandemic there are instructions located on the KNOWA 2.0 - NCC Knowledge Management Portal for Tier 2 and Tier 3 Covid-19 pandemic enquiries and for Tier 4 specific scenarios related to the pandemic.

12 Further information

12.1 Please refer to:

- Consent Phone Enquiry KA
- Handling Challenging Calls KA
- General Enquiries KA
- NCC PACE Enquiry Categorisation Guide
- NCC PACE SYSTEM GUIDANCE
- Actioning Enquiries about NDIS SMS in PACE KA

13 Enquiry note template

13.1 General Enquiry

Date of enquiry: DD/MM/YYYY
Person making enquiry: Include name and relationship to participant (if not participant)
Contact number:
Details of the query:
Action taken:

Name:
Log on ID:
Service Officer
National Contact Centre

14 Document owner and approver

Director, Support and Communications, Contact Centre Branch

15 Feedback

If you have any feedback about this procedure, please refer to your NCC Team Leader.

- **NCC Service Officers (NCC SOs)** please send your feedback to your NCC Team Leader. Your Team Leader may have an answer to your question or have information to share with you to resolve your questions and feedback.
- **NCC Team Leaders (NCC TLs)** please review the feedback from NCC SOs and provide advice, information and resolve questions where possible. NCC TLs can request new or updated NCC Guidance Resources and assistance using the relevant form on the National Contact Centre Service Desk on the intranet.

NCC Service Officer Guidance

NCC PACE Knowledge Management Portal

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Table of Contents

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1 Service Officer Guidance

The NCC Service Officer Guidance page provides information for:

- Operational procedures, and
- Knowledge articles for system and processing of enquiries for NCC Service Officers.

NCC Service Officer Operational Procedures

Select a heading from the below list to expand and view the content.

Document Purpose

The National Disability Insurance Agency (NDIA) National Contact Centre (NCC) Service Officer (SO) Guidance page provides you with important information and instructions to deliver the NDIA NCC Contact Services. The page has been developed by the NDIA Contact Centre Branch (CC Branch) with contributions and feedback from NCC staff.

The page is for NCC Inbound Telephony, Webchat, Email Enquiries, Non-Telephony Processing and Outbound Call Campaigns.

Quick Guide to NCC Resources and Relevant Knowledge Articles

People who speak an Indigenous language or a community language (CALD) People who are deaf, hard of hearing and or have a hearing or speech impairment	Assist person with their preferred communication method KA
Call Handling Basics NCC Customer Types Managing my communication Enquiry Resolution and Referral	Call Handling Basics KA
Professional and Plain English writing	Professional Writing Email Enquiry KA
Managing challenging verbal conversations and written contacts	Handling Challenging Calls KA
Enquiry Referrals	External Referral Points for Enquiries QRG NCC PACE Enquiry Categorisation Guide
Priority Enquiry Tier 2,3 and 4	NCC PARTICIPANT ENQUIRIES
Using approved NCC instructions and resources	How to navigate KNOWA 2.0 KA
Handling General Enquiries	General Enquiries KA
Protecting people's privacy POI	Privacy Phone Enquiry KA Consent Phone Enquiry KA

About the NCC

NDIA National Contact Centre

The current service provider for the NDIA NCC is Serco Citizen Services commencing on the 12 June 2018. The previous NCC service provider was the Commonwealth Department of Human Services.

NCC phone number and operating hours

The NDIA National Contact Centre phone number is **1800 800 110.** The National Contact Centre is open from **8am to 8pm, Monday to Friday,** (in a person's state or territory).

NCC Knowledge Management System 'KNOWA'

The KNOWA 2.0 - NCC Knowledge Management Portal (NCC Knowa) has all of the Agency approved enquiry handling instructions, information and tools that must be used by all NCC staff. The NDIA Service Support Team in the NDIA Contact Centre Branch manage and maintain NCC Knowa.

About the NCC Service Officer role

1.1 My role

Your important role is to deliver personalised and high quality contact centre services about the NDIS for people with a disability, their families, carers and representatives, this also includes service providers and organisations.

You contribute to improved outcomes for people with a disability by:

- Assisting people build their knowledge and skills and exercise their choice and control
- Providing positive support to people who apply to become a NDIS participant
- Connecting people with service providers, partners and community information
- Assisting individuals and organisations to register as a NDIS provider
- Helping build people's confidence in the NCC, NDIS and NDIA.

Your customers are at very centre of everything you do:

- You are often a person's first point of contact about the NDIS and NDIA. People are often having their very first conversation about the NDIS and their needs with you.
- You protect and respect people's privacy.
- You professionally deliver first contact resolution of people's enquiries delivering a complete quality service.
- You process referrals to appropriate NDIA business areas for resolution as instructed.
- You handle priority enquiries and situations and escalate these as required.

1.2 My skills

Your skills are used to deliver quality person-centred NCC services to achieve:

- Positive and respectful contact experiences with people
- Clear understanding of diverse customer needs and enquiry types
- Efficient information gathering and provision
- Positive support and assistance for completion of NDIA business processes
- Effective trouble-shooting and problem solving
- Good understanding and knowledge of other NDIA service areas for enquiry referrals
- Accurate documentation and recording.

1.3 My service commitment

Your service commitment is based on the NDIA Service Charter. Your customers, your colleagues and the NDIA expects these service standards from you:

I provide people with disability, their families and carers access to personalised, high quality and innovative contact centre services:

- I welcome, respect and include diverse cultures, perspectives and life experiences as I deliver our service
- I respect and protect the privacy and dignity of people with disability
- I give people choices about how they want to communicate with me and ensure accessibility
- I give people choices about how much support and assistance they want from me
- I communicate with people with empathy and understanding
- I respond to initial reports of urgent and critical enquiry types and escalate as instructed
- I accurately record information and outcomes in business system interactions as required.

1.4 My feedback

Your feedback about the way that the NCC delivers NDIA customer services is highly valued.

Your feedback is used for the continuous improvement of NCC resources, services and systems all aimed at the delivery of quality NCC services for our customers.

You can contribute your feedback by email to your NCC team leader and provide as much detail and factual information as possible in a balanced and constructive way. This means your team leader can investigate, act and let you know the outcome.

1.5 My ideas for improvements

Your ideas and suggestions to improve NCC service delivery are strongly welcomed. You are at the frontline delivering NCC customer services and you have valuable experience and expertise to contribute.

The CC Branch Improvement Team work with the NCC and NDIA areas to implement service improvements to meet the needs of our customers.

You can contribute your innovative ideas and suggestions by sharing these with your team and team leader.

1.6 How I keep updated

Keeping updated and informed about the NDIS and the NDIA is essential. As the NDIS is implemented, improvements are being made to the Scheme for participants, providers and partners. This means there are new and changed policies, processes and operating procedures.

You keep updated by checking and reading information accessed from the KNOWA 2.0 - NCC Knowledge Management Portal:

- New or updated communiques, knowledge articles, tools and other resources.
- Scheduled changes to opening hours.

- Service or system issues or disruptions.
- Internal update communiques and scripts categorised into relevant headings.

1.6.1 Other NDIA pages

- NDIA ICT Services – about outages, service disruptions and known issues
- NDIA Huddle Messages – NDIA business area information not for distribution outside of the Agency.
- NDIS website

Using the NDIA Business System (PACE)

PACE, based on Salesforce CRM, is built by the NDIA, for the NDIS. This means we can make sure it works for our people.

PACE, over time, will replace the existing SAP CRM business system and become the core business system for our people to support people with disability, their families, and carers.

The NDIA Business System PACE is a electronic database sometimes also referred to as the 'staff portal'. The PACE is used by the NCC, NDIA staff and partners to create, manage and maintain records of new prospective participants, defined participants, non-defined participants, prospective participants, authorised representatives, providers and people contacting the NDIA and NDIS Partners regarding the early childhood approach and Information Linkages and Capacity Building (ILC) and other key external stakeholders.

These records are referred to as customer records in the system and consist of person records (i.e. participants and contacts of participants) and organisation records (i.e. registered service providers).

Correctly searching the system is key to making sure the correct record is retrieved when completing all tasks and also reduces the likelihood of duplicate records. Creating and maintaining high quality accurate records is an essential role of the Agency and the NCC to achieve a nationally consistent approach to service. Records in PACE provide seamless customer service to our customers and demonstrates compliance with expected quality and privacy standards.

Logging in and out of PACE

To log on double-click the NDIS Logon shortcut on your desktop. To close your session, select the personalise icon on screen and sign out.

PACE How To Guides

Resources on NCC PACE SYSTEM GUIDANCE helps NCC CSO with selected tasks on how to effectively navigate, identify and help complete general tasks in the PACE system.

Enquiry Resolution and Referral

First contact resolution

This is your delivery of a complete service to the person where you handle and resolve their enquiry with no referral made. You are to resolve all enquiries that are in scope for the NCC. This means all enquiries that are within the full capacity and full responsibility of the NCC.

Enquiry referrals

Your NCC resources clearly instruct you when you are required to refer a person's enquiry to another NDIS business area (Service Delivery and Region, National or other). Requirement for an enquiry referral can be due to the urgency of the enquiry and/or the NCC not having Agency authorisation to resolve the enquiry.

There are NCC Knowledge Articles (KA's) and other instructional resources for all known enquiry types.

There are two enquiry referral types - warm transfer and email.

Helping participant find a Provider

- The NCC is not to recommend providers.
- The NCC is to continue to refer them to the Provider Finder tool an if further assistance is required the person can be referred to their local partner in the community.
- To refer to their local partner in the community refer to Applying for the NDIS with Partners in the Community Phone Enquiry Knowledge Article

Warm transfer by phone (internal) • Local Area Coordinators (LACs) • Internal phone advice services and helpdesks • For instructions go to Call Handling Basics KA
Warm transfer by phone (external) • National Safeguards and Quality Commission
Email referral using email templates: • CRM email referral • Email referral using Outlook
Enquiry assignment types include by: • Email or within PACE • Phone warm transfer to Local Area Coordinators (LACs)

Priority enquiry Tier 2, 3 and 4

Priority enquiry referrals include Business As Usual (BAU) Tier 2 and Tier 3 levels of enquiries that are urgent and is used when the enquiry type is urgent and there is a risk as outlined in the Priority Enquiry KA

Using approved NCC instructions and resources

You only use NDIA NCC and other Agency approved resources and information sources to deliver NCC services. No other source of information is to be used. Use of non-approved resources and information can result in inaccurate and/or insufficient information being given to a person with negative impacts on the person and damage to the agency's reputation.

NDIA staff and partners have their own business instructions and resources across the pathways for participants and providers.

NCC KNOWA - Knowledge Management System

The approved source of your NCC approved instructions and resources is the KNOWA 2.0 - NCC Knowledge Management Portal

Quality enquiry notes

You create enquiry notes in many areas of the PACE Business System. Enquiry notes are file notes or case notes containing relevant and additional information to a customer.

All enquiry notes recorded must be factual. As for all information in the Agency, enquiry notes are subject to Freedom of Information (FOI) and so it is important to not record information using an emotive or subjective approach.

You are to create and maintain timely, high quality and accurate enquiry notes using NCC enquiry note templates. The templates are based on key Agency business processes and NCC enquiry types and also have been developed based on feedback from NCC SOs.

When a PACE record is accessed and information is provided by a customer then an enquiry note must be documented. When recorded correctly and consistently, enquiry notes allow the NCC and the Agency to easily search for and retrieve information.

Note: When you speak with a child representative or nominee, you must ensure you place enquiry notes on the caller and the participants record.

Managing business system records

You are to professionally manage people's information on the system:

- Make sure personal information is correctly recorded
- Keep to the facts
- Don't state your opinions in a participant's enquiry note records
- When linking individuals as contacts in PACE, ensure you are linking the up-to-date and correct contact
- Store all personal information for participants on PACE.
- Only use, receive or send personal information on a strict need-to-know basis.

NCC Channels and Work Types

People can make enquiries to the NDIA about the NDIS through a number of different communication channels designed to meet their needs. The NCC operates work types or programs for the channels that fall within NCC responsibility. NCC work types include:

Inbound Telephony:

- First contact resolution or referral of enquiries through the NCC 1800 800 110 phone number.

Non-Telephony processing work

NCC delivers support to providers through the NCC Provider Support Team:

- Progressing provider registrations for delegate decisions
- Resolving in scope provider enquiries

Management of the following email inboxes and responding to enquiries that the NCC are responsible for (in scope) and referring enquiries outside of NCC responsibility (out of scope) to correct business areas, partners and others.

- NCC Email Enquiries Inbox
- Provider Payments Inbox
- Feedback and Complaints Inbox

Webchat

The NCC delivers first contact resolution or referral of enquiries from the NDIA Webchat online 'live' chat platform. Webchat is available at the same opening times of the NCC. CSO's use approved scripted responses (also called canned responses), and free text to ensure communication is person centred. NCC can assist participants with their personal circumstances once they have verified the person's identity using the standard operating procedures.

Important

- Webchat is available on the main NDIS website, Contact | NDIS and the NDIS micro site, NDIS Improvements. Both websites are powered by the same platform, Amazon, therefore you won't see a difference when receiving webchat enquiries. The NCC are to evaluate the enquiry and refer to information contained in the websites when responding.

- An enquirer can save a copy of their transcript at the end of the chat. So, it is important the information provided is accurate and displays the above communication skills and standard.
- The NDIA is likely to be bound by the information provided to participants and other customers by the NCC, so the availability of this information in writing via the chat transcript option makes it easier for customers to have a complete record of the conversation.

Outbound Call Campaigns

The CC Branch works with NDIA business areas to identify new work for NCC service delivery. This involves the NCC making outgoing or outbound calls to targeted groups for the following purposes:

- Satisfaction and usage surveys
- Follow-up contact due to Scheme or service provider changes
- Onboarding of new providers
- Progression of work for next stage responses

NCC Telephony System

Telephony queue and Interactive Voice Response (IVR)

When a person contacts the NCC 1800 800 110 phone number, they will receive an automated welcome message and are offered five enquiry type options for selection:

- Option 1 for information about joining the NDIS
- Option 2 for information about using a plan, updating info or using self service
- Option 3 for information about housing or home modification
- Option 4 for changing or having a plan reassessed
- Option 5 if you are the NDIA Provider

When the caller selects one of the five options above, they enter a telephony queue and receive pre-recorded privacy statement which advises that this call may be recorded and listened to for quality and coaching purposes. The message also advises the estimated wait time.

If you require further information about this pre-recorded statement, please speak to your team leader.

Scheduled changes to operating hours

Scheduled changes to NCC opening hours take place when there are national public holidays and state and territory based public holidays. People are not able to contact the NCC on national public holidays. People are not able to contact the NCC when they reside in a state or territory where there is a public holiday. The Agency reduces its regular operations from Christmas Day with normal business resuming on the first working day after New Year's Day. The time between these two dates is known as the Reduced Activity Period (RAP).

You can find information about scheduled changes to opening hours on the BULLETIN NOTICE BOARD NCC KNOWA 2.0 page. Notices will also refer you to information to communicate to customers if needed.

After hours message service

If a person contacts the NCC before 8:00am and after 8:00pm (local time), they will receive the following message:

Thank you for calling the National Disability Insurance Agency. Our office is currently closed. Our Contact Centre hours are 8:00am to 8:00pm, Monday to Friday excluding Public Holidays. You can visit our website at ndis.gov.au. If you require emergency assistance outside of these hours, please call either 000 for emergency services or Lifeline on 13 11 14.

Service issues or disruptions

The NDIA CC Branch and the NCC service provider monitors and acts on reports of possible or actual disruptions, outages to the telephony services and/ or business systems. You can find information about any service issues or disruptions on the BULLETIN NOTICE BOARD NCC KNOWA 2.0 page. Notices will refer you to information to communicate to customers if needed.

Reporting telephony and system problems

You are responsible for quickly reporting any issues or problems with the NCC telephony system and NDIA business systems. This includes feedback from customers. Your timely reporting means an investigation can be made as soon as possible and we can minimise any impacts on our customers and CSOs. Systems include the:

- NDIA Business System (PACE)
- NDIS website
- NDIA intranet
- Participant and Provider portals
- Outlook and;
- any other internal NCC systems.

You are to report problems to your team leader who will advise you if this is a known or unknown problem. You are not to initiate or use any unapproved workaround processes including phone-calls, emails or MS Teams messages to NDIA staff and partners.

An Agency approved workaround to your current call handling instructions may be put in place and will be communicated by your Team Leader and by a notice on the NCC Knowa Home page.

NDIA Contact Centre Branch

The NDIA Contact Centre (CC) Branch is the business owner of both the NCC service and the NCC service contract. Serco Citizen Services is the current service provider delivering NDIS NCC services. The CM Branch sits in the NDIA Partner and Contact Centre Division.

CC Branch staff are located in the NDIA National Office in Geelong, Victoria, in other NDIA offices and at the two NCC service centres in Newborough and Dandenong, Victoria. The NDIA CM Quality Assurance Team has an NDIA Quality Assessor at both sites and plays a role to validate the quality of NCC service delivery.

The CC Branch Service Support Team produces enquiry instructions and resources and works with NCC staff and NDIA business areas to make sure these are accurate and accessible.

Quality Assurance

Quality in the NDIA means the Agency meets service commitments to participants through legislative correctness, process compliance and delivery of services at expected standards.

The NDIS Contact Centre Quality Monitoring Framework (QMF) was launched in July 2021. The Framework defines specific sets of requirements that describe what a quality contact experience is, for a person making an enquiry to the NCC by phone or email. The CC Branch's Quality and Continuous Improvement Team are located at NCC service sites and work closely with NCC Quality Managers and NCC staff. Further information about the QMF is available on the NCC Quality and Continuous Improvement Team intranet page.

The QMF supports the NDIA strategic aspirations in the corporate plan. We put people with disability, their families and carers at the heart of everything we do. For NCC service delivery this means achieving improved outcomes for participants; high-quality interactions and experiences with the NCC; and first contact resolution wherever possible. For the Agency, this also means creating plans at scale and improved participant pathway experiences.

The quality of NCC service delivery is regularly checked and assessed to make sure required quality standards in the Framework are being met. CC Branch Quality Assessors, assess whether the interaction with the person was actioned in line with Agency approved resources and instructions and is supported by evidence. All assessments need to fairly and accurately represent NCC staff service delivery and customer outcomes.

A range of assessment methods and evaluation tools, based on the Framework, are used including recorded inbound telephony recording (call recording), post-call customer focused surveys and evaluation scorecards. NCC team leaders coach staff when needed and provide factual, meaningful, constructive and timely feedback to NCC staff.

The CC Quality Assurance Team manages the CC Branch feedback program about NCC service delivery. The Agency's Service Delivery, partner and business areas provide feedback to the Branch usually by email to the Branch's shared mailbox. The feedback is investigated, acted upon and outcomes are reported both to the sender and to the NCC. The types of feedback received include:

- Missing or incomplete details in PACE
- Missing or incorrect details within referrals
- Incorrectly sent referrals to the wrong destinations
- Unnecessary referrals and / or out of scope referrals for service delivery and business area
- Written and verbal commentary not in line with NDIA values and behaviours.

My Relationship with NDIA staff and partners

The NCC is a NDIA front line customer service and delivers services using approved Agency business processes and instructions. Some NDIA staff based at NDIS offices and in NDIA business areas can also provide a front line customer service to people within their roles and responsibilities.

One NDIA is an Agency way of working and operating. One NDIA means CSOs, NDIA staff and partners carry out their responsibilities in a way that make sure a person's experience of the NDIS, across the whole pathway, is streamlined, consistent, meets their needs and is a quality experience.

For some enquiries, you will commence a business process with a customer and then are required to refer the person's enquiry to a NDIA staff member or partner for resolution.

Your relationship with NDIA staff and partners and their relationship with you is professional, respectful and understanding of responsibility boundaries.

Approved communication channels

- Under no circumstances can either CSOs, or NDIA staff and partners (including planners), provide full names, email addresses or contact numbers of each other to customers
- When actioning enquiry referrals to NDIA staff and partners, you are to only use the approved communication channels using NCC Knowa Knowledgement Management System.
- You are not to use any unapproved communication channels to directly communicate with NDIA staff and partners. This includes MS Teams messaging or email communications. The exception use of MS Teams for internal NCC communications as approved by your Team Leader
- NDIA staff and partners are also only to use approved communication channels. They cannot directly MS teams message or email NCC CSOs. The process for NDIA staff and partners to give feedback or make enquiries about the NCC appears on the NDIA CC Branch how to give feedback intranet page.

Work Instruction: If you receive a direct MS Teams message or email from an NDIA staff member or a partner

- **Do Not** reply
- **Tell** your Team Leader and give them the details of the staff member contacting you

- **Team Leader** replies to the person using the following script:

Start Quote Icon Hi ,<sender's name>, I am < your name> Team Leader at the NDIA National Contact Centre. You contacted CSO < CSO name> by < MS Teams or email>. Direct contact with NCC staff using MS Teams or email is not an approved communication process. NDIA staff or partners and the NCC are to follow the feedback process on the NDIA Contact Centre Branch how to give feedback intranet page and email the ndiscallcentre@ndis.gov.au mailbox. A staff member from the Branch will be in contact with you. Thank you End Quote Icon

My NDIA values and representing the NDIA

Serco Citizen Services is a partner of the NDIA and as an employee of Serco Citizen Services you represent the NDIA. This means living the NDIA values and upholding the Australian Public Service Values and Code of Conduct.

My NDIA values guide our day-to-day actions, attitudes, communication, behaviours, decisions and our capabilities for the successfully delivery of NCC services and the NDIS. Living our values will give each other and our customer's confidence in our NCC service work, in the NDIS and the NDIA.

Your four NDIA values have been developed by staff and partners and are:

- We grow together – we work together to deliver quality outcomes
- We value people – we put participants at the heart of everything we do
- We aim higher – we are resilient and always have the courage to do better
- We take care - we own what we do and we do the right thing

Your everyday living of the NDIA values includes your workplace behaviours. The NDIA Value Behaviours (PDF) supports you to do this.

NCC Service Enquiry Types

You handle a very wide range of inbound telephony enquiries that cover both the entire NDIS participant pathway and the provider pathway. You also handle general enquiries about the activities and operations of the NDIA. The range of enquiry types fall into the following categories:

Protecting people's privacy and maintaining business information

- Verifying identity, checking authority and consents
- Updating people's records and communication choices.

Understanding the NDIS

- What is the NDIS
- How the NDIS works
- The NDIS rollout
- Supports funded by the NDIS
- About guardians and nominees
- Support services in the community and for families and carers
- How the early childhood approach works
- How to contact and engage with the NDIA and partners.

Applying for the NDIS

- What are the eligibility and access requirements
- How to make an access request and how access decisions are made

- How to get assistance to complete a Verbal Access Request
- How to request a review of an unsuccessful access decision.

Being an NDIS Participant

- How the planning process works
- How to create and use participant plans
- How plans are approved
- Compensation and plans
- Creating service bookings
- Submitting payment requests (self-managed participants)
- How to request a review of a reviewable decision
- Reviewing plans and goals
- Working with providers
- Finding, keeping and changing jobs
- Housing and the NDIS
- Assistive Technology and Home Modifications
- Home, equipment and supports
- myGov Participant Portal support.

Being an NDIS Provider

- Provider role and registration
- Price guides and information
- Quality and Safeguards
- Provider Toolkit

Feedback, complaints and privacy

- How to give feedback or make a complaint
- What are the NDIA's privacy obligations?
- Freedom of Information (FOI) requests
- Reporting privacy matter concerns

Fraud prevention and control

- What is fraud?
- How to report suspected fraud

Other enquiry service areas

- Finding out about NDIA events, news and media releases
- Providing information about the NDIA Agency: governance and service charter
- Linking people to resources, publications and translated materials
- Grant opportunities
- Information, Linkages and Capacity Building (ILC)

Call Handling Basics

Please refer to Call Handling Basics KA to help you to:

- prepare for call handling and provides support materials around key call handling processes.
- understand information on the types of challenging calls you may experience, techniques and tips for dealing with challenging calls, and examples of effective responses to help deal with challenging situations.
- understand inbound call sequence and identify when an enquiry is a priority enquiry that requires escalation.

and provide detailed information around:

- NCC Customer Types
- Managing my communication
- Enquiry Resolution and Referral
- My Customers and My Communication

Caller requests a receipt number but does not have a person or provider account

Enquiry cases can be created in situations where there is **no** PACE account, and the caller requests a case number for future reference.

- These enquiry cases are **not** linked to person or provider accounts.
- Create the enquiry case **only** if the caller requests a case number for the call.

1.7 How to create an enquiry case not linked to a person or provider account

- Select **cases** from the drop-down list.

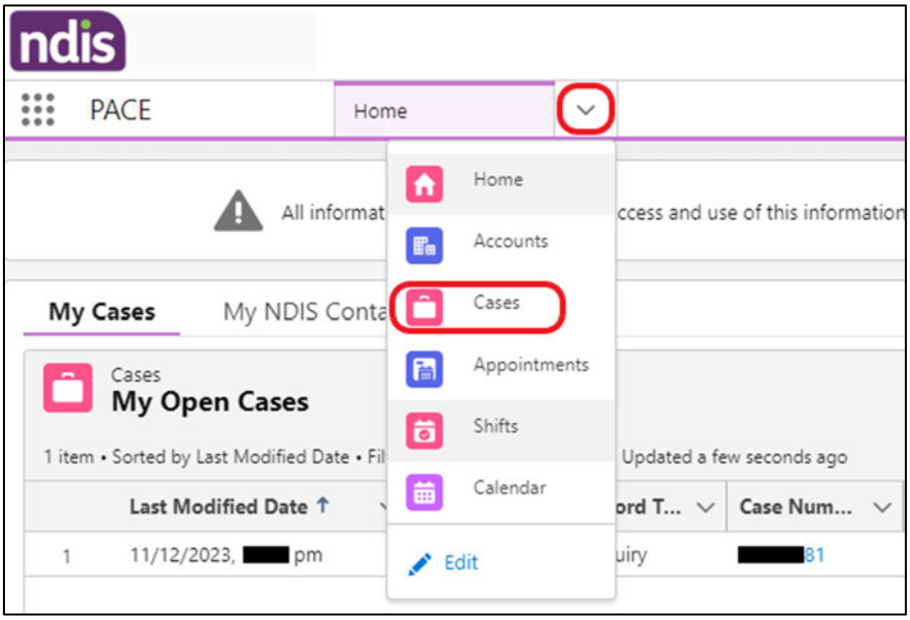

Figure 1 Screenshot of cases selected.

- Select **New** to create a new **Enquiry Case**.

- The **New case** screen will display.
- The remaining steps are the **same** as indicated in Enquiry Cases and Log Activity in PACE KA.

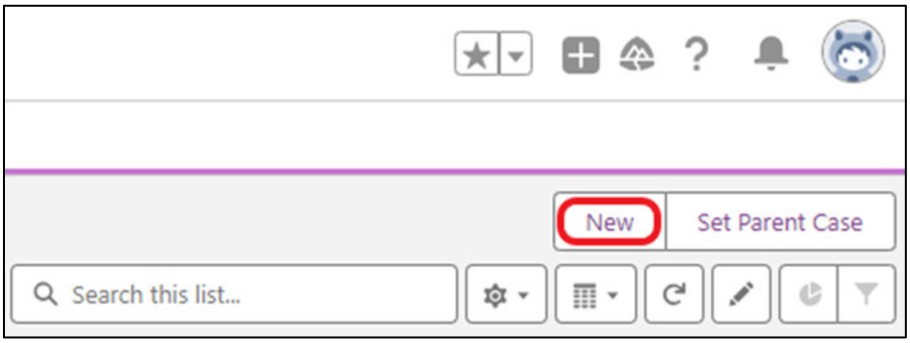

Figure 2 Screenshot of cases tab with the new button selected.

For further information on how to create an enquiry case, please refer to Enquiry Cases and Log Activity in PACE KA.

My Customers and My Communication

1.8 People with disability

Representing the NDIA, you have a positive contemporary attitude to people with a disability. Your thinking and views of disability are based on the social model of disability and human rights model of disability. The social model says that by dismantling physical and attitudinal barriers, we can ensure people with disability are included in the community as active citizens and are able to effectively exercise their rights. The human rights model of disability upholds the human rights of people with disability. It accepts and progresses the social model and underpins the NDIA.

There are around 4.3 million Australians who have a disability.

Disability types include:

- Intellectual
- Physical
- Sensory
- Cognitive
- Psychosocial

A person does not have to be an NDIS participant to receive support from the NDIS. The NDIS will connect people with disability, their families and carers, including people who are not NDIS participants, to disability and mainstream supports in their community.

1.9 Diversity and Inclusion

You deliver NCC services that meet the needs of our diverse customers. Your service is inclusive and all of your customers feel valued, respected and have equal access and opportunity to NCC and NDIA services.

Diversity includes the common and different identities, characteristics, beliefs, backgrounds, relationships and demographics of people and include:

- Disability
- Aboriginal and Torres Strait Islander
- Lesbian, gay, bisexual, transgender and intersex (LGBTI)
- Cultural, ethnic, religious and linguistic
- All ages
- Gender
- Caring responsibilities
- Educational levels
- Life and work experience
- Socio-economic background.

Professional and Plain English Writing

When you are responding to written communication from customers contacting the Agency through emails or Webchat, you need to respond accurately, professionally, consistently and in a way that is easy to understand for the person. Consistent messaging showcases NDIA values and maintains the Agency's and the NCC's standard of service and reputation.

You can find information, examples and instructions in the NCC Professional Writing Email Enquiry KA.

It is important to use consistent professional language, written format and layout when responding to enquiries in writing. You use Email Response Templates for the work type you are doing e.g. email enquiries or Webchat.

Email responses communication

Showing understanding, empathy and respect in written responses is required to effectively manage challenging email contacts. This communicates to the person that the NDIA cares and the Agency is trying hard to resolve the person's enquiry in a timely manner. Generic responses that can appear like an automatic acknowledgement can further escalate a person's concerns and lead to more email communication or a request to lodge a complaint.

Webchat communication

Communicating professionally is very important for live chat. It is the content of your responses that ultimately leads to the resolution of any issues. The current phase of Webchat (phase 2) allows the NCC to add free text to existing approved canned response. You can edit and change wording from the canned response apart from adding the name of the enquirer. You can make your communication more person centred and edit and change wording from the canned response to make the response more personable and customer focussed. You use Amazon Connect Webchat Guidance KA to plan and manage your communication.

Outbound Call Campaigns communication

Often you may be calling customers about matters that might be significantly impacting on them in challenging ways. A section called 'Communication' always appears on NCC Outbound Scripts and provides you with specific information about what the person may be experiencing and why and also guidance on how to deliver your communication.

Using approved NCC instructions and resources

You only use NDIA NCC and other Agency approved resources and information sources to deliver NCC services. No other source of information is to be used. Use of non-approved resources and information can result in inaccurate and/or insufficient information being given to a person with negative impacts on the person and damage to the agency's reputation.

NDIA staff and partners have their own business instructions and resources across the pathways for participants and providers.

NCC KNOWA - Knowledge Management System

The approved source of your NCC approved instructions and resources is the KNOWA 2.0 - NCC Knowledge Management Portal.

Guide and descriptions of NCC resources

This table lists your main approved resources with a brief description and their purpose.

NCC Customer Service Officer Staff Manual	Introduction to the NCC, the role and services of a NCC CSO, how to engage, communicate and manage conversations and contacts, call handling basics and corporate enquiries.
BULLETIN NOTICE BOARD NCC KNOWA 2.0	Regular and urgent notices about operational matters and new or changed instructions and resources.
PACE Salesforce Business System	PACE, based on Salesforce CRM, is being built by the NDIA, for the NDIS. PACE is only available for our participants and providers located in Tasmania until it's nationwide release in mid 2023. PACE, over time, will replace the existing SAP CRM business system and become the core business system for our people to support people with disability, their families, and carers. Please refer to information contained on the NDIS website - How we're improving and Frequently asked questions for providers in Tasmania | NDIS
KNOWA 2.0 - NCC Knowledge Management Portal	This portal provides the information that you need when fielding enquiries and working in the new PACE business system. Agency business process or processes used to deliver the NDIS across the participant and provider pathway. Includes: • NCC roles and responsibilities • Overview information • Work Instructions: step by step instructions to resolve or refer an enquiry and complete a business process with the person and within the NDIA Business System • Scripted words are highlighted and must be read out with no variation
NCC PACE SYSTEM GUIDANCE	• Instructional guides on specific processes and use of NCC resources and business systems
Email Response Templates	• Templates to be used to resolve and refer enquiries coming through the enquiries mailbox, complaints and feedback mailbox also requests for Printed material requests, Provider support, Urgent AT repair requests and other.
Scripts Inbound Scripts Outbound Communiques (internal) NCC Knowa Home page	**Scripts** • Provide the NCC with the knowledge and capacity to effectively resolve inbound telephony enquiries about the NDIS and a wide range of Agency programs and activities. • Key communication messages are provided to ensure accurate and consistent messaging. References are given to existing

	Agency and NCC resources, including the NDIS website, for enquiry resolution and also to assist customers who choose to locate information themselves. Information may appear in a 'Frequently Asked Questions' format where there is anticipation of many enquiries or for topics that are more complex. Script topics for the NCC can include: New initiatives, programs and events Reviews, consultations, surveys and policy changes Scheme implementation Provider and partner updates • The CM SS teamwork with NDIA Business owner areas to develop and produce scripts. • Some call handling instructions may be temporary. Others will become ongoing and will appear into your NCC resources. • Communicate and introduce NCC service delivery, system enhancement and functionality changes that are often require rapid implementation. Detailed information and instructions are provided to the NCC. Ongoing operational information will be transferred into your NCC resources.
Monthly release notes of the updated NCC resources NCC Knowa Home page	Summary report published every four weeks about new and updated resources and instructions. BULLETIN NOTICE BOARD NCC KNOWA 2.0 Recently Updated Pages
Operational Guidelines	NDIA's operational guidelines and information to deliver the NDIS. Based on the *National Disability Insurance Scheme Act 2013 (external) (External website)* and relevant *Rules (external) (External website)* made under the NDIS Act.
NDIS Website	Information about the scheme for the public and for use to resolve enquiries.

Handling General Enquiries

1.10 There are a number of enquiry types that are in scope for NCC service delivery that relate to Agency activities, programs and approved communication channels and include.

- Please refer to General Enquiries KA which help you:
-
    - Understand what the 'Other' /'General' Enquiry Categorisation Type is in PACE
    - Handle a general enquiry where the participant or provider record is not accessed
    - Create an enquiry note for Other/General Enquiries in PACE

- NCC PACE Enquiry Categorisation Guide helps you to select and follow steps for the correct case categorisation when resolving or triaging an enquiry in PACE.

Freedom of Information request process

The Freedom of Information Act 1982 (Cth) (FOI Act) gives people the right to access copies of documents the NDIA hold. The NDIA can refuse access to some documents, or parts of documents, that are considered exempt under the FOI Act.

- When a person calls the NCC and asks for information about FOI and how to make a FOI request:
    - **Provide** the person with details of how they can access information on the NDIA Freedom of Information page on the NDIS website.
-
    - **Advise the person that an FOI request must:**
        - be in writing
        - state that the request is an application for the purposes of the FOI Act
        - include as much information as possible about the document (s) being requested
        - include an email or postal address for reply
-
    - **Advise** an FOI request or an enquiry about whether the information sought can be provided outside the FOI Act, can be emailed to foi@ndis.gov.au or sent via post to:

    The Freedom of Information Section

    Parliamentary, Ministerial and FOI Branch

    National Disability Insurance Agency

    GPO Box 700

    Canberra ACT 2601
-
    - **Advise** the person can access the myplace portal if they just want to validate information that the NDIA holds about them.

NCC Service Officer Guidance - Knowledge Articles

- Page:Call Handling Basics KA
- Page:Communicating with and about people with disabilities KA
- Page:Disability Awareness and Language QRG
- Page:External Referral Points for Enquiries QRG
- Page:General Enquiries KA
- Page:Handling Challenging Calls KA
- Page:How to navigate KNOWA 2.0 KA
- Page:Legislation Enquiry Knowledge Article
- Page:Order NDIS Printed Publications KA
- Page:Outbound Call Script Guidance KA
- Page:PACE Terminology Definitions KA

- Page:Professional Writing Email Enquiry KA

KNOWA 2.0 Home page

Use this link to navigate back to KNOWA 2.0 home page.

S47E (d) - Certain Operations of agencies KNOWA 2.0 Home page

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KNOWA 2.0 Search

Search here to find NCC knowledge articles and guidance.Search