

MWRTU FILE TRIAGE & ALLOCATION PROCESS

This procedure is to be supported by initial face-to-face practical demonstration.

START – An email is received saying you have a new job, check Joget

1. Open Joget and in the triage section put your name in the Triage Allocated To box and click save at bottom of the section
2. Review the job and determine the trigger type, trigger reason and priority
3. Check client name and SAIC via InfoNET Client Search (noting the ICN if available), and if necessary also check Tableau and ABN Lookup.
 - a. If no ICN can be found seek admin help to find it
 - b. If no ICN exists use AGD ICN [REDACTED] when necessary later in this process
4. Check is the PCBU a Comcare Licensee? (Google *Comcare Current Licensees* and check the list)
 - a. If No go to step 4
 - b. If Yes
 - i. Send email outlining the matter to [REDACTED]
 - ii. Triage the file as a P5 to ICN [REDACTED]
 - iii. Attach email you sent to Comcare to the Infonet file created
 - iv. Await AP confirmation the next day then close file
5. Is the PCBU an MWRTU client?
 - a. If Yes go to step 5
 - b. If No
 - i. Determine which team the job needs to go to
 - ii. Ascertain who is triaging in that particular team
 - iii. Triage the file against the client ICN you noted earlier
 - iv. Triage the job across to the relevant person in the other team
 - v. Open the relevant Joget job's email in the *AGD:SWSA Manufacturing Wholesale Transport & Utilities* inbox, and click forward. Make a note on the email with a note 'One for your team, check Infonet'. Send the email to the person you identified at point ii above.
 - vi. Drag the above sent email into the *AGD:SWSA Manufacturing Wholesale Transport & Utilities Sent to another Team* folder
 - vii. Delete the original email from *AGD:SWSA Manufacturing Wholesale Transport & Utilities* inbox
6. Determine the trigger type, trigger reason and priority
 - Determine who file is to be allocated to
 - Open the relevant Joget job's email in the *AGD:SWSA Manufacturing Wholesale Transport & Utilities* inbox, and click Actions Edit Message
 - Record trigger type, trigger reason and priority and who the file is being allocated to in the email. Click save then close eg
 -



MWRTU FILE TRIAGE & ALLOCATION PROCESS

- Drag the now edited email into [REDACTED] or [REDACTED] folder in *AGD:SWSA Manufacturing Wholesale Transport & Utilities*

