

What's included

This document type includes any material that is explaining how something is done or what is to be done. Procedures often show how rules and guidelines are put into effect. Besides procedures, examples in this category include process descriptions, workplace instructions, standard operating procedures, process flows. In fact, anything where you are trying to say how something is done or what is done.

Best practice for procedures

Procedures should

- be written in clear, concise, simple language
 - avoid information that may be quickly outdated (eg names)
 - be action and outcome-oriented with consistent repeatable predictable results
 - be unambiguous
 - make it easy for the reader to find relevant information
 - make important, critical information stand out
 - be readily available.
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The Challenge

One of the greatest challenges in writing procedure material is getting people to read it and then act intelligently on the information.

As the Before samples show, they can be full of complexity and present a mixture of information types making it hard for a reader to find the information they are seeking.

The Solution

The After documents show how this information can be separated into distinct types with rules separated from instructions. Labels provide a summary of the contents and act as an aid to skimming. Warning, examples and notes are easy to identify.

The second example shows how procedures can be presented online for use in a call centre system of knowledge.

Function	Description
<p>Test Procedure:</p> <ol style="list-style-type: none"> 1. Turn off ventilation 10 min. before testing 2. Meter calibrated and min. response checked <p>Test from outside space:</p> <ul style="list-style-type: none"> • Via manways, vents, top hatch, etc. • At different points and heights <p>Note: Do not trust senses.</p> <ol style="list-style-type: none"> 3. Test for substances on JHA or CSP 4. AGST wear BA if test cannot be done from outside space <p>If satisfied with test from outside space:</p> <ul style="list-style-type: none"> • Enter space, sweep probe all around in direction of travel • Match progress to detector response <ol style="list-style-type: none"> 5. Test at all levels to detect contaminant gases <p>Note: AGST must wear a personal monitor within 300mm of the mouth which measures O₂, LEL and any identified toxic gases such as H₂S and use a CS Safety Standby whilst carrying out atmospheric testing of the space.</p> <ul style="list-style-type: none"> • Lifeline/ harness • Exit if alarm given <ol style="list-style-type: none"> 6. Record test results on Permits 	<p>c) Testing Procedure:</p> <ol style="list-style-type: none"> 1. Turn off ventilation to the space 10 minutes before testing to allow the testing to truly reflect the atmosphere in the space. 2. Ensure the testing equipment has been calibrated and minimum response checked. <p>From outside the space, test atmosphere by:</p> <ul style="list-style-type: none"> • inserting probe through manways, drains, vents, stubs (where displacer legs and sight glass fittings have been removed), or lower through top hatches. • testing at several different points and heights. <p>Note: Never trust the senses to determine confined space air safety – you cannot see or smell many toxic gases such as Carbon Monoxide, nor determine the level of oxygen present.</p> <ol style="list-style-type: none"> 3. Test atmosphere for any toxic substances listed on the JHA or CSP. 4. If testing cannot be performed from outside the space, the AGST must not enter until a JHA for entry has been developed by the AGST, AGSI and Safety Department with the risks of entry lowered to ALARP. <p>Where satisfactory test results are obtained from outside the confined space:</p> <ul style="list-style-type: none"> • Enter the space and complete the testing by sweeping the probes approximately 1 metre in front of, to each side and high and low in the direction of travel. • Ensure the rate of progress through the space is slowed to match the sampling speed and detector response. <ol style="list-style-type: none"> 5. Check for stratification of gases by testing all vertical levels of the space – top, middle and bottom in order to detect contaminants that are lighter, the same as, or heavier than air. Also include sumps, etc., where liquid contaminants may gather. <p>Note: AGST must wear a personal monitor within 300mm of the mouth which measures O₂, LEL and any identified toxic gases such as H₂S and use a CS Safety Standby whilst carrying out atmospheric testing of the space.</p> <ul style="list-style-type: none"> • Lifeline and harness may also be required (refer rescue plan). • If any alarm sounds, exit the space immediately. <ol style="list-style-type: none"> 6. Record all test results on the Confined Space Permit and any Hot Work Permits for the tasks in the space.

Gas testing

WARNING

Never trust your senses to determine confined space air safety – you cannot see or smell many toxic gases such as Carbon Monoxide, nor determine the level of oxygen present.

Testing rules

The following rules for testing apply

- If testing cannot be performed from outside the space, the AGST must not enter until a JHA for entry has been developed by the AGST, AGSI and Safety Department with the risks of entry lowered to ALARP.
- The AGST must wear a personal monitor which measures O₂, LEL and any identified toxic gases such as H₂S within 300mm of the mouth
- Lifeline and harness may also be required (refer rescue plan).
- If any alarm sounds, the AGST must exit the space immediately.

Rules separated from instructions

Testing Procedure

The key steps are as follows:

Step	Action
1	Prepare for testing by <ul style="list-style-type: none"> • turning off ventilation to the space 10 minutes before testing to allow the testing to truly reflect the atmosphere in the space. • ensuring the testing equipment has been calibrated and the minimum response checked.
2	From outside the space, test atmosphere by: <ul style="list-style-type: none"> • inserting probe through manways, drains, vents, stubs (where displacer legs and sight glass fittings have been removed), or lower through top hatches. • testing at several different points and heights.
3	Test atmosphere for any toxic substances listed on the JHA or CSP
4	Where satisfactory test results are obtained from outside the confined space, enter the space and complete the testing by sweeping the probes approximately 1 metre in front of, to each side and high and low in the direction of travel. <p>Notes:</p> <ul style="list-style-type: none"> • Ensure the rate of progress through the space is slowed to match the sampling speed and detector response. • Check for stratification of gases by testing all vertical levels of the space – top, middle and bottom in order to detect contaminants that are lighter, the same as, or heavier than air. Also include sumps, etc., where liquid contaminants may gather.
5	Record all test results on the Confined Space Permit and any Hot Work Permits for the tasks in the space.

Clear Instructions

SCENARIOS FOR GREAT AUSSIE HEALTH CHECK (Member Club) FULFILMENT ENQUIRIES:

- Member has not received their cashback cheque
(Start at **Step 1**. All subsequent steps to be followed.)
- Member has received an invalid cashback cheque
(Start at **Step 4**. All subsequent steps to be followed.)

Step 1:	<p>CONFIRM DEAL CODE APPLIED TO POLICY NOTE: The deal code cannot be applied /edited by the branch/ call centre staff retrospectively in this instance.</p>
Step 2.	<p>CONFIRM ELIGIBILITY</p> <ul style="list-style-type: none"> - Deal Code applied from the date joined fund - Have a packaged product (hospital and extras) - Be financial for up to 5 years <p>NOTE: Member Club issues a cash to the member once the membership has been financial for 12 months (this could take up to 4 weeks after the 13 month financial period).</p> <p>REMINDER: KEY TERMS AND CONDITIONS The offer is for switchers only and <u>excludes</u> existing Company customers. To be eligible for the switcher's cash-back offer, you need to take up the special offer and be a financial member of Company for at least 13 months.</p> <p>The cash will be sent to you by Member Club.</p> <p><i>If you take up the offer and you are not already a member of Member Club, you will become a member upon taking up the offer.</i></p>
Step 3.	<p>READ DISCLAIMER</p> <p>Some new members may be calling Company about the Member / The Great Aussie Health Check campaign on the back of a recommendation, there is a chance they might not have seen the terms and conditions as noted above. It is important to read the following disclaimer and record the answer in the WRAPUP in HC06.</p> <p style="text-align: center;">Disclaimer:</p> <p style="text-align: center;"><i>"Do you give permission to Company to provide your contact details to Member Club in regards to this joining promotion only?"</i></p>
Step 4.	<p>MANAGE MEMBER EXPECTATIONS</p> <p>We understand the member may not be happy with the delay.</p> <p>Provided that the member meets the eligibility criteria and all of the steps in this process are followed cash will be sent out by Member Club after 13 months – 1st instalment (and subsequent instalments).</p> <p>- <i>"The issue has been identified and we apologise for the inconvenience. Please allow up to 4 weeks for the cheque to be sent to your postal address."</i></p>
Step 5.	<p>FULFILMENT FOLLOW UP TEMPLATE</p> <ul style="list-style-type: none"> - Send the completed follow up template to CallCentreSalesEnquiries@xxx.com.au <p>Example</p>

Member number	12347895
Member name	John Smith
DJF	01/12/2015
Deal Code	Missing
Eligibility Confirmed	Yes
Disclaimer Read	Yes
Email Address used to register with Member Club / One Big Switch	j.j.smith@example.com.au
Member scenario	Member Club deal code missing, member has not received cash-back.

OTHER ENQUIRIES

If the enquiry is regarding anything other than the member not receiving the cash-back, the enquiry needs to be handled and closed out by the frontline staff member answering that enquiry.

As part of the Member Club new sales enquiry process - The Call Centre Sales team will be working closely with the Branch Support Office and providing new sales enquiries/hot leads from prospects that have initially called the CC Sales Team and have been offered a call back in regards to the Great Aussie Health Check joining offer.

The expectation is that the prospect will be advised to expect a call back within a 2 hour time period or at their best and most convenient time.

PLEASE DO NOT transfer the calls related to Member Club: GREAT AUSSIE HEALTH CHECK campaign or fulfilment enquiries to Sales Manager or the Sales Team.

CONTACT:

For any questions regarding the content of this MMI, please contact:

Chief Sales Officer**Attachments**

A – T&C's

B – Great Aussie Health Check - FAQs

C – Scenarios to Manage Fulfilment Enquiries

Great Aussie Health Check (Member Club) Offer

How to...

[Signup a member](#)

[Handle an enquiry](#)

[Handle a complaint](#)

How to handle a complaint

When a member calls to complain about a problem with the cashback, use this procedure.

Step	Task
1	<p>Has the member received their first cheque?</p> <ul style="list-style-type: none"> • If yes, go to Step 5 • If no, go to Step 2
2	<p>Has the deal code has been applied to this member?</p> <ul style="list-style-type: none"> • If yes, go to Step 3 • If no, tell the member that you will fix this <p>Ask the member this: <i>"Do you give permission to company to provide your contact details to Member Club in regards to this joining promotion only?"</i> Record their answer in the WRAPUP in HCO6.</p>
3	<p>Does the member have a package product (hospital and extras)?</p> <ul style="list-style-type: none"> • If yes, go to Step 4 • If no, tell the member they are not eligible because they don't have an eligible product
4	<p>Has the member been financial since they joined?</p> <ul style="list-style-type: none"> • If yes, go to Step 5 • If no, tell the member that they are not eligible because they have been non-financial
5	<p>Confirm the expected amount of the cashback with the member, and also the payment address details. If there are any errors in our records, correct them.</p> <p>Tell the member that <i>"The issue has been identified and we apologise for the inconvenience. Please allow up to 4 weeks for the cheque to be sent to your postal address. The first cheque should be with you 14 months after you joined, and every 12 months after that."</i></p>
6	<p>Send an email to CallCentreSalesEnquiries@company.com.au with the following information:</p> <ul style="list-style-type: none"> • "Member Club enquiry" • Member number • Member name • Date Joined Fund • Eligibility confirmed (yes/no) • Disclaimer read (yes/no) • Member email address sent to Member Club • Problem (deal code missing, etc)