Client Complaint (Edit) Screen

Updated in November 2024

Home > Client Management (Search Client) > Complaint > New Complaint/Update

Business Purpose:

The **Client Management – Complaints Record** page allows the user to create a new or update an existing incomplete Complaint record.

How to:

i. 'Client Management – Complaint List' page:

   1) To create a new complaint record, click the New Complaint action button.
   2) To update/view an existing Complaint, from the Client Management – Complaint (list) page, click on the '*Complaint ID*'.

ii. Clicking on the '*New Complaint*' button – will take the user to a new **'Client Management - Complaint Record New'** tab.

   1) 'Complainant' section, where a user can select and fill out the following mandatory fields:
      - Source* - if *'Client'* option is selected from drop-down menu the following next fields will be hidden: *First Name**, *Last Name**, *Contact Information**.
      - First Name* (if enabled) – a free text field where the user can enter client's first name.
      - Last Name* (if enabled) – a free text field where the user can enter client's last name.
      - Contact Information* (if enabled) – the user can enter additional client information.
      - Program* - a single select drop-down menu of all Programs from the Client History list.
      - Method of Contact* - a drop-down menu where the user can select one method of communication.

   2) 'Complaint Description/Narrative' section.
      - a free text tab named 'Complaint Description/Narrative*', where the initial complaint from the client/representative is documented.
      - Once saved, it can no longer be edited, and it is read-only.

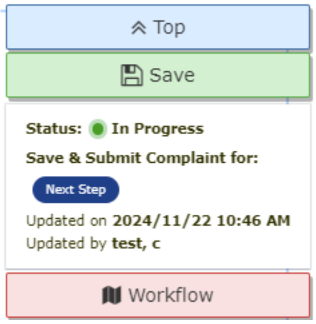
3) 'Creator/Edit/Review/Approval' section. There are additional mandatory fields the user must fill out each time new or changes to the information are done at each stage of the complaint review:
   - Type – a drop-down menu with the '*Creator*' option to select.
   - Job Title - a free text field where staff indicate their job title.
   - Did you review/confirm the information in this report? – a drop-down menu with Yes/No selections.

4) Clicking on the 'Save' button will open an '*Important Message*' pop-up window with two options to select:
   - 'Cancel' button – will not save the complaint record.
   - 'Okay' button - will save the complaint record with all information entered.
   - Once the complaint is saved a complaint ID number is created and complaint status moves to '*In Progress*'.

iii. Clicking on the '*Complaint ID*' link - takes the user to the **'Client Management - Complaint Record'** tab.

1) 'Complaint Details' section:
   - There are two options to select under TSS/24-Hour TRS:
     a) Toronto Shelter Standards*:
        - *Complaint is related to Toronto Shelter Standards* – a radio button with a TSS drop-down menu and a searchable bar option.
        - *Complaint is NOT related to Toronto Shelter Standards* – a radio button option when a complaint is not related to TSS.
     b) 24-Hour Respite Site Standards*:
        - *Complaint is related to 24-Hour Respite Site Standards* - a radio button with a 24-Hour TRS drop-down menu and a searchable bar option.
        - *Complaint is NOT related to 24-Hour Respite Site Standards* -a radio button option when a complaint is not related to 24-Hour TRS.
   - Once TSS/24-Hour TRS is selected and saved the complaint status still stays '*In Progress*'.

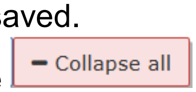
2) Clicking on the floating 'Workflow' window will either expand/collapse:



- Clicking on the 'Top' button will move the user to the top of the complaint page.
- Clicking on the 'Save' button will open an '*Important Message*' pop-up window with two options to select:
  - 'Cancel' button – will not save the complaint changes.
  - 'Okay' button - will save the complaint record with all information entered.
- Clicking on the 'Next Step' button – moves the complaint status to next stage '*Investigation in Progress*.'
  - 'Back' button – returns the user to the previous complaint stage.

3) 'Investigation' section.

- 'Description Investigation Activities*' tab - afree text tab, where the progress of the investigation can be described in detail.
  - Once the text saved and the complaint is moved to next stage, this field can no longer be edited.
- 'Update Investigation Activities' button – hides and opens the 'Description Investigation Activities*' tab.
- 'Clear Investigation Activities' button – clears text in the 'Description Investigation Activities*' tab.
- Clicking on the 

button will expand the investigation log records once saved.
- Clicking on the 

button will collapse the investigation log records once saved.

4) ‘Creator/Edit/Review/Approval’ section. There are additional mandatory fields to enter.
    - Type – a drop-down menu with the ‘**Editor**’, ‘**Reviewer**’ options to select.
    - Job Title - a free text field where staff indicate their job title.
    - Did you review/confirm the information in this report? – a drop-down menu with Yes/No selections.

5) Clicking on the ‘Save’ button will open an ‘*Important Message*’ pop-up window with two options to select:
    - ‘Cancel’ button – will not save the complaint changes.
    - ‘Okay’ button - will save the complaint record with all information entered.

6) Clicking on the floating ‘Workflow’ button will expand/collapse:
    - Clicking on the ‘Next Step’ button will move the complaint status to next stage ‘*Investigation Completed*.’
        - Clicking on the ‘Back’ button – returns the user to the previous complaint stage screen.
    - Clicking on the ‘Next Step’ button again will move the complaint status to next stage ‘*Client Informed of Resolution*.’
        - Clicking on the ‘Back’ button – returns the user to the previous complaint stage screen.

7) ‘Outcome’ section:
    - ‘Description of Complaint Resolution*’ tab – a free text tab, where a detailed description of the complaint resolution documented.
        - Once text is saved and the complaint is moved to next stage, this field can no longer be edited.
    - ‘Was the complainant satisfied with the outcome? *’ – a drop-down menu with multiple selections.
    - There are two options to select under TSS/TRS breached:
        a) ‘Toronto Shelter Standards Breached’**:**
            - ‘*The Toronto Shelter Standards were breached*’ – a radio button to select with a TSS breached drop-down menu with a searchable bar option.
            - ‘*The Toronto Shelter Standards were NOT breached*’ - a radio button option to select when a complaint is not related to TSS breached.

b) '24-Hour Respite Site Standards Breached':
   - *'The 24-Hour Respite Site Standards were breached'* - a radio button to select with a TRS breached drop-down menu with a searchable bar option.
   - *'The 24-Hour Respite Site Standards were NOT breached'* - a radio button option to select when a complaint is not related to TRS breached.

- 'Update Complaint Resolution' button – hides and opens the 'Description of Complaint Resolution*' tab.
- 'Clear Complaint Resolution' button – clears a text in the 'Description of Complaint Resolution*' tab.
- Clicking on the + Expand all button will expand the outcome log records once saved.
- Clicking on the − Collapse all button will collapse the outcome log records once saved.

8) 'Creator/Edit/Review/Approval' section. There are additional mandatory fields to enter.
   - Type – a drop-down menu with the '*Editor*', '*Reviewer*' options to select.
   - Job Title - a free text field where staff indicate their job title.
   - Did you review/confirm the information in this report? – a drop-down menu with '*Yes/No*' selections.

9) Clicking on the 'Save' button will open an '*Important Message'* pop-up window with two options to select:
   - 'Cancel' button – will not save the complaint changes.
   - 'Okay' button - will save the complaint record with all information entered.

10) Clicking on the floating 'Workflow' window will either expand/collapse it:
   - Clicking on the 'Complaint Resolved and Pending Approval' button will open an '*Important Message*' pop-up window:
     - Clicking on the 'Toronto shelter Standards' button will open a '*Toronto Shelter Standards*' pdf.
     - Clicking on the '24-Hour Respite Site Standards' button will open a '*24-Hour Respite Site standards*' pdf.

  - Clicking on the '*Okay*' button will save the complaint record with all information entered and will move the complaint status to the next stage '*Complaint Resolved and Pending Approval*'.
- 'Back' button – returns the user to the previous complaint stage.

11) 'Creator/Edit/Review/Approval' section. There are additional mandatory fields to enter.
    - Type – a drop-down menu with the '*Approver*' option to select.
    - Job Title - a free text field where staff indicate their job title.
    - Did you review/confirm the information in this report? – a drop-down menu with Yes/No selections.

12) Clicking on the 'Save' button will open an '*Important Message*' pop-up window with two options to select:
    - 'Cancel' button – will not save the complaint changes.
    - 'Okay' button - saves the complaint record with all information entered and will move the complaint status to the last stage, '*Complaint Resolved and Approved*'.

Important Notes:

1) Clicking on the 'Close' button will close the complaint record.
2) Clicking on the 'Print' button will open a detailed description of the complaint in pdf format.
3) Clicking on the 'Help' button will redirect the user to an offline webpage where a PDF document with description of a complaint help guide will open.
4) Clicking on the 'View History' button will redirect the user to the '**Complaint History Log**' screen.
5) Clicking on the 'Workflow' window will not be enabled for all staff but only for the staff with higher roles permissions.
6) C/E/R/A ('Creator/Edit/Review/Approval') input is required for the staff, but not for the staff with a higher role.
7) Clicking on the 'Info' button will expand and collapse the information box.