

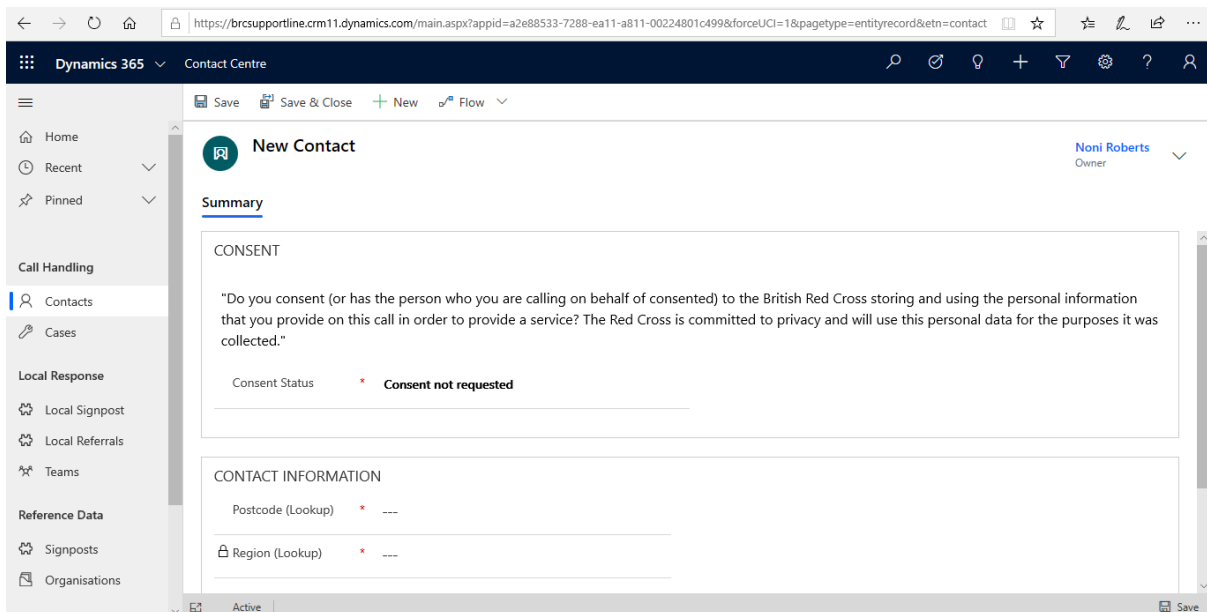
Guidance for inputting contacts: When someone is calling on behalf of someone else.

If a caller contacts the support line on behalf of someone else, you can use this guide to help you navigate the Dynamics 365 system and input the information correctly.

### Input the details of the caller

Even if the caller doesn't require the support, and they're calling for someone else, our first step to input this case is to add the details of the **caller**.

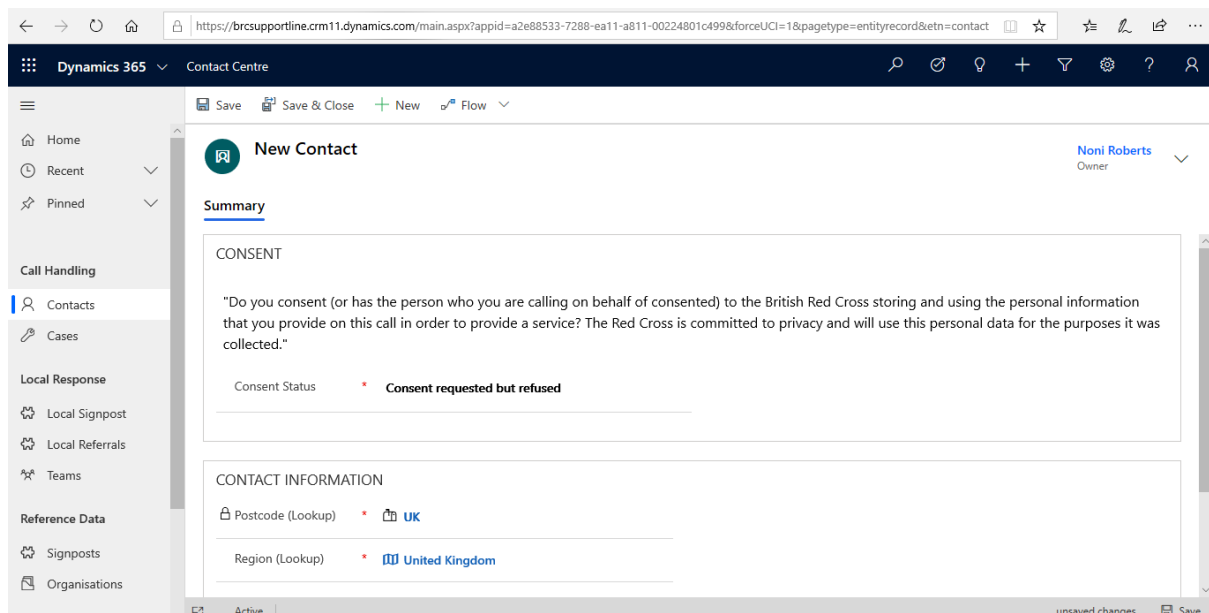
When you click '+New' on the contacts/home page and are faced with this screen:



The screenshot shows the Dynamics 365 'New Contact' form. The left-hand navigation pane includes sections for 'Call Handling', 'Contacts', 'Cases', 'Local Response', and 'Reference Data'. The main content area is titled 'New Contact' and shows a 'Summary' section with a 'CONSENT' heading. Below this heading is a text box containing a consent statement: "Do you consent (or has the person who you are calling on behalf of consented) to the British Red Cross storing and using the personal information that you provide on this call in order to provide a service? The Red Cross is committed to privacy and will use this personal data for the purposes it was collected." Below the text box is a 'Consent Status' dropdown menu, which is currently set to 'Consent not requested'. Below the consent section is a 'CONTACT INFORMATION' section with two lookup fields: 'Postcode (Lookup)' and 'Region (Lookup)', both of which are currently empty.

Keep in mind that on this screen, we will always input the details of the **caller**. Even if they don't require the support.

If the caller isn't happy for us to keep their details on the database, we can change the 'Consent Status' dropdown to 'Consent Requested but Refused'. Then to create an 'Anonymous Contact' we can add 'UK' in the postcode lookup, and 'United Kingdom' will fill in automatically in the 'Region' section.



The screenshot shows the Dynamics 365 'New Contact' form with the 'Consent Status' dropdown menu changed to 'Consent requested but refused'. In the 'CONTACT INFORMATION' section, the 'Postcode (Lookup)' field now contains 'UK' and the 'Region (Lookup)' field now contains 'United Kingdom'. The rest of the form, including the consent text and navigation pane, remains the same as in the previous screenshot.

If the caller is happy for their details to be stored on the system, we can change the consent status here to 'Consent granted'. When we do this, more fields will appear. When we're filling these in, we need to keep in mind that in this section we are thinking of the **caller**.

#### CONSENT

"Do you consent (or has the person who you are calling on behalf of consented) to the British Red Cross storing and using the personal information that you provide on this call in order to provide a service? The Red Cross is committed to privacy and will use this personal data for the purposes it was collected."

Consent Status	* Consent given	Consent Given By	* The Caller for themselves
Consent Decision Date	* 05/08/2020		

The 'Consent Given By' section on this page should stay as 'The Caller for themselves'. Because this page is focussing on **the person who has called** (even if they aren't the person who needs the support), this section is all about them. And as they are speaking to us and giving us their information, they have given consent themselves for us to keep their information on the system. We can then choose the day the consent was given in the 'Consent Decision Box'.

Once we have their consent, we can input the details of the **caller** on this page.

**New Contact** Noni Roberts  
Owner

Summary

---

CONTACT INFORMATION

First Name	* Smokey	Address Line 1	---
Last Name	* Robinson	Home Phone	---
Postcode	* SY12 2TM	Mobile Phone	* 07787676564
Postcode (Lookup)	* SY		
Region (Lookup)	* Shrewsbury		

Save the contact, then scroll down to the bottom of the page and click '+ New Case'.

**Smokey Robinson**  
Contact Noni Roberts  
Owner

Summary Related

---

Region (Lookup) \* Shrewsbury

---

Caller Cases (Save to Activate)

+ New Case Refresh

Search this view

Case Title	Case Number	Priority	Caller (Party)	Beneficiary	Owner	Sta
------------	-------------	----------	----------------	-------------	-------	-----

No data available.

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

When we open the new case, the details of the caller and beneficiary will automatically populate with the details of the caller.

The screenshot shows a 'New Case' form with the following elements:

- Header:** 'New Case' title, 'Normal' priority, 'Created On' field, 'New Case' case status, and 'Noni Roberts' owner.
- Navigation:** 'Summary' (active) and 'Timeline' tabs.
- Caller & Beneficiary (highlighted in red):**
  - Caller Full Name\*: **Smokey Robinson**
  - Who Requires Urgent Practical Support\*: **The Person who Called**
  - Beneficiary\*: **Smokey Robinson**
  - Territory: ---
- Summary Notes:** ---
- Support:**
  - Psychosocial Support Given\*:  No
  - Safeguarding Activated:  No
- Local Signposts (Save to Activate):** (empty)
- Local Referral (Save to Activate):** (empty)

Because the caller is calling **on behalf of someone else**, we need to make some changes to this section.

In the section where it says 'Who Requires Urgent Practical Support', we need to change that drop down so it says 'Someone Else'.

When 'Someone Else' is selected, the 'Beneficiary' field becomes empty.

In this field we can search for the beneficiary to see if their details are already recorded on our system.

If, for example, Smokey Robinson was calling on behalf of Mickey Mouse. We would type Mickey Mouse into this field, and if Mickey was on the system, we would have to confirm it's the same person by asking the **caller** to confirm that individual's full name and postcode.

This screenshot shows the 'Caller & Beneficiary' section with the following state:

- Caller Full Name\*: **Smokey Robinson**
- Who Requires Urgent Practical Support\*: **Someone Else**
- Beneficiary\*: ---
- Consent from Beneficiary:  No
- Two red error messages:
  - ⊗ Required fields must be filled in.
  - ⊗ You must confirm the caller has consent from the beneficiary to discuss this case,

This screenshot shows the 'Beneficiary\*' search dropdown with the following state:

- Search input: Mickey
- Dropdown list:
  - Mickey Mouse, EH54 6GF
  - Mouse Mickey, IG4
- Buttons: '+ New Contact' and 'Change View'

If Smokey Robinson was calling on behalf of Marvin Gaye, on the other hand, we could search the system like so:

We can see here that when searching 'Marvin', no results are coming up on the system.

(Remember to ask the caller how to spell the beneficiaries name, so your search is accurate!)

Because Marvin Gaye isn't on the system, we're going to have to add his details to the database.

We can do this by clicking on '+New Contact' as seen in the picture on the left.

Clicking that button will cause a pop up to appear to prompt you to ask the caller whether the beneficiary has given them consent for us to keep their details on the system. When this pop up appears, you need to read from the bracketed text, as shown below.

## Consent Statement



"Do you consent (or has the person who you are calling on behalf of consented) to the British Red Cross storing and using the personal information that you provide on this call in order to provide a service? The Red Cross is committed to privacy and will use this personal data for the purposes it was collected."

Close

After closing this Consent pop-up, you will notice that a 'Quick Create – Contact' section has appeared on the left of the screen.

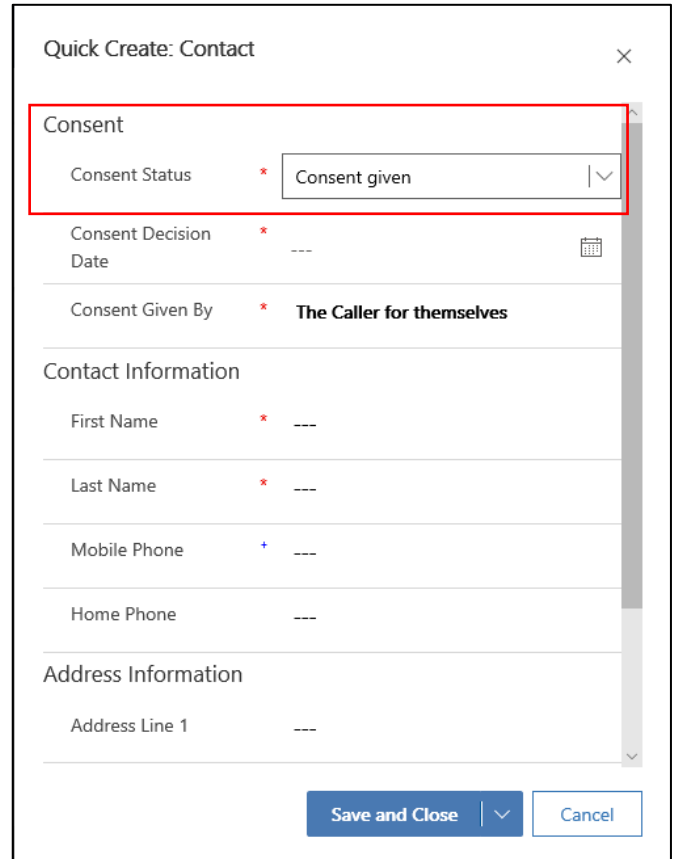
### Input the details of the Beneficiary

In this section, we are thinking about the **beneficiary**, so **the person who needs the support**.

You might notice that we're faced with the same questions on this 'Quick Create: Contact' section, as we saw when we were inputting the details of our caller.

The difference is, we are now thinking about the **person who needs the support**, or the **beneficiary**.

The first part for us to complete here is about consent. The script above was asking the caller if we had consent to keep the beneficiary's details on the database, so if they said 'yes', we can change this 'Consent Status' to 'Consent Given'.



Quick Create: Contact

Consent

Consent Status \* Consent given

Consent Decision \* ---

Date ---

Consent Given By \* The Caller for themselves

Contact Information

First Name \* ---

Last Name \* ---

Mobile Phone + ---

Home Phone ---

Address Information

Address Line 1 ---

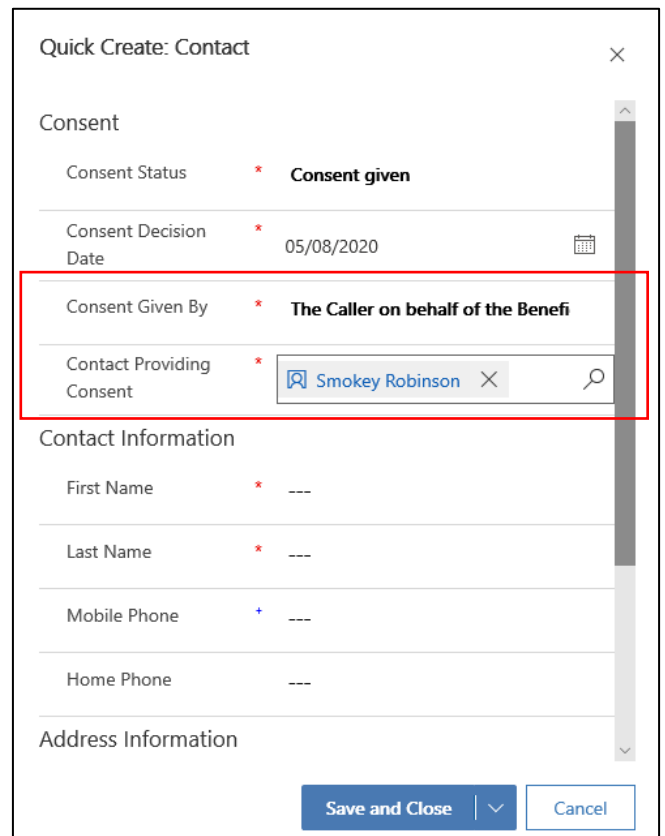
Save and Close | Cancel

Once this has been selected, you'll see more fields appear for you to fill in. But before we input the details of the beneficiary, we need to make it clear **who has provided consent** for us to keep their details on the database.

Because we haven't **spoken** directly to Marvin Gaye, the consent for us to keep his details on the database has been given **by the caller on behalf of the beneficiary**, so that's what we should choose in the dropdown next to 'Consent Given By'.

Once this has been chosen, we'll have to detail **who** has given this consent in the field that says: 'Contact Providing Consent'. In this instance, that's Smokey Robinson, so we need to type his name in, then select his name from the drop down that will appear.

Then we can input Marvin Gaye's details in the database, and click 'Save and Close' for this information to save onto the database, and for us to return to the case.



Quick Create: Contact

Consent

Consent Status \* Consent given

Consent Decision \* 05/08/2020

Date ---

Consent Given By \* The Caller on behalf of the Benefi

Contact Providing Consent \* Smokey Robinson

Contact Information

First Name \* ---

Last Name \* ---

Mobile Phone + ---

Home Phone ---

Address Information

Address Line 1 ---

Save and Close | Cancel

After clicking 'Save and Close' on the 'Quick Create: Contact' page, we'll see that Marvin Gaye's name is now in the 'Beneficiary' field on the case.

We then need to make sure that the caller has consent from the beneficiary to discuss this case with us, once they have confirmed this, we can click 'Consent from Beneficiary' from 'No' to Yes' (See screen-shot below).

You're then ready to continue with your case, and fill in the necessary details in summary notes.

If you need future help please call Tech Support Line on **0203 841 2324**.

Quick Create: Contact

Contact Providing Consent \*

Contact Information

First Name \* Marvin

Last Name \* Gaye

Mobile Phone + 07676876857

Home Phone ---

Address Information

Address Line 1 15 Grapevine View

Postcode \* SY12 2HH

Postcode (Lookup) \*

Region (Lookup) \*

Save and Close | Cancel

Dynamics 365 Contact Centre

Save & Close Save & Route New Save Flow

New Case Normal Priority Created On New Case Case Status Noni Roberts Owner

Summary Timeline

Caller & Beneficiary

Caller Full Name\*

Who Requires Urgent Practical Support\* Someone Else

Beneficiary\*

Consent from Beneficiary  No

You must confirm the caller has consent from the beneficiary to discuss this case, before saving the record

Summary Notes

Support

Psychosocial Support Given\*  No

Safeguarding Activated  No

Local Signposts (Save to Activate)

Local Referral (Save to Activate)

Active | unsaved changes Save

New Case Normal Priority Created On New Case Case Status Noni Roberts Owner

Summary Timeline

Caller & Beneficiary

Caller Full Name\*

Who Requires Urgent Practical Support\* Someone Else

Beneficiary\*

Consent from Beneficiary  Yes

Territory

Summary Notes

Support

Psychosocial Support Given\*  No

Safeguarding Activated  No

Local Signposts (Save to Activate)

Local Referral (Save to Activate)