University Services Feedback (USF) eForm Transition Project

A User Guide for Service Leads

19 July 2024 version

The Australian National University
TEQSA Provider ID: PRV12002 (Australian University) | CRICOS Provider Code: 00120C

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Introduction

University Services Feedback is a streamlined process to encourage feedback on any service at ANU through a quick and easy form. As part of the Smart IQ eForm transition project and following the University Feedback Service Feeback [policy](#) and [procedure](#), the current USF eForm is replaced by the USF portal in Microsoft PowerApps.

> - For general information about USF, please see the [USF website](#).

Audience

The Planning and Service Performance Division is responsible for delivering reporting dashboards for the Deputy Vice-Chancellor International & Corporate / Chief Operating Officer to facilitate monitoring of feedback received and the responsiveness of Service Leads.

The University Performance Team can monitor, review and respond to all feedback submissions received through USF portal.

The Service Lead is responsible for processing USF review and respond to submissions received in accordance with the University Service Feedback [policy](#), and identifying the submissions received that do not meet the definition of 'feedback' under the University Services Feedback policy and directing them to the appropriate channel.

Glossary

| Terms	Definition
Contributor	Member of the University community who submits feedback.
Service Lead (SL)	Division Director (or delegate) who is responsible for feedback received
Service Lead Division	The business domain for which the feedback is received
Respondent	Staff member who is tasked with communicating with Contributor and (or) resolving a feedback request. The service lead can elect to be the feedback respondent
Feedback type	A piece of feedback can be a compliment, feedback, or an idea for improvement
Service	A piece of feedback can submitted be to one of the following services: University strategy, direction and leadership, Alumni Relations and Philanthropy, Corporate Governance and Risk, Facilities, Finance and Business Services, Human Resources, Information Technology, International Strategy and Partnerships, Legal services, Marketing and Communication, Planning and Performance Measurement, Research Services, Scholarly information services, Service Improvement Group, Student Administration, Student Life, and Teaching support. Please note Services does not necessarily mean the responsible Service lead division

Overview
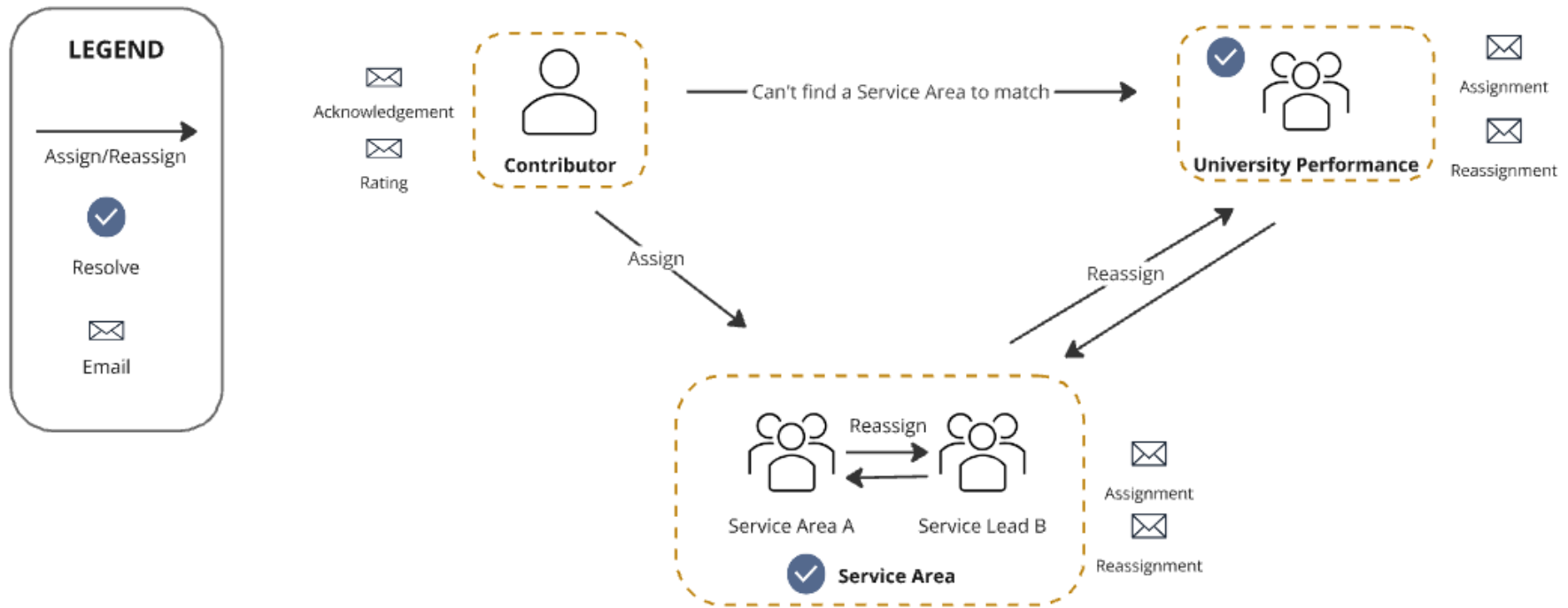
How to access the USF Portal

Navigate to the USF Power App portal by following the direct link in the notification email or by clicking this link: <u>Model App.</u> If you are unable to access that link, please <u>submit a request</u> to request support.

The Model App link is accessible in the notification email sent to service leads.
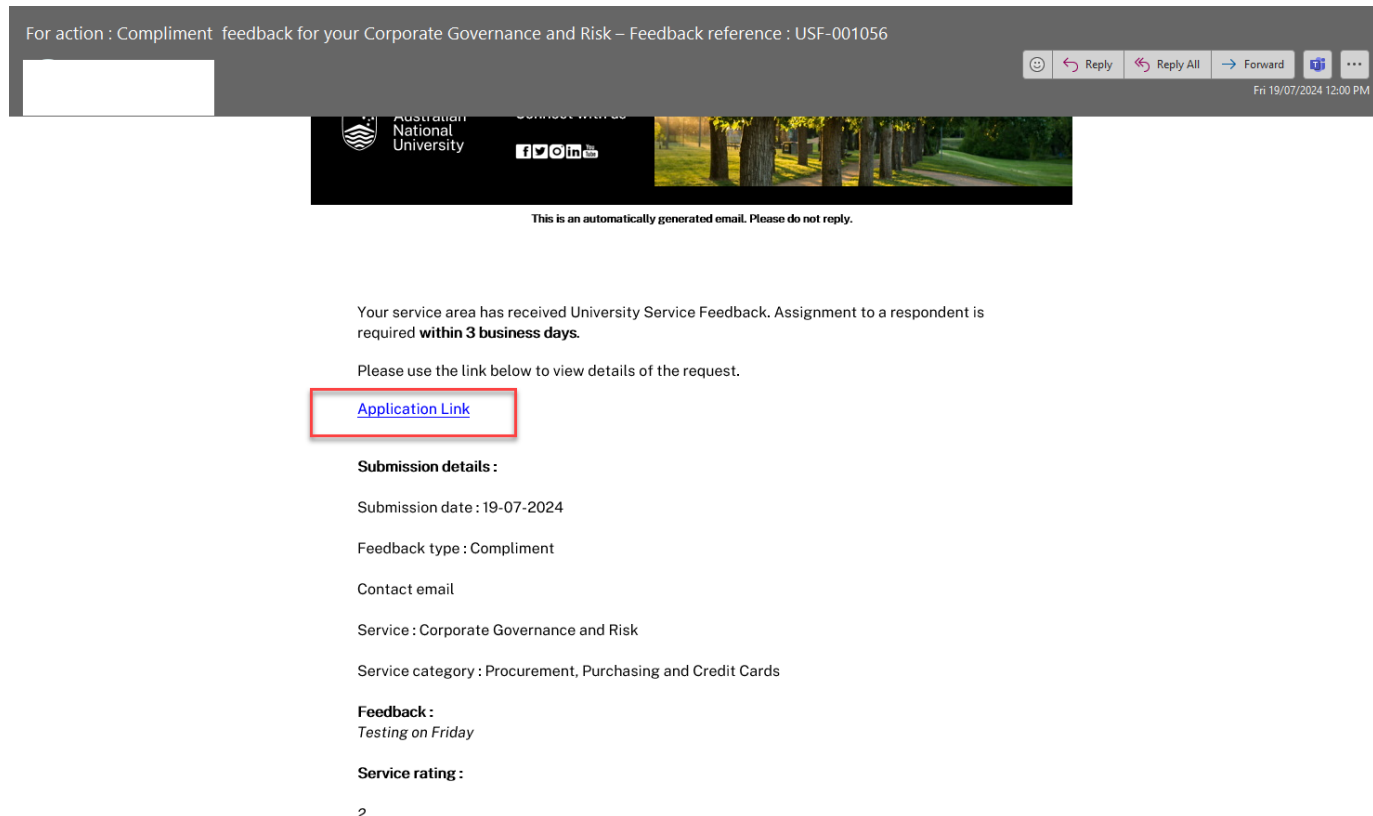
General Features

Key elements on the first page in USF review/decision portal in PowerApps:

A. Menu
- o **Feedback (for Service Lead review)**
- o Service Feedback Surveys
- o USF Dashboard

B. Column name with drop-down arrow (**C**)
- o The column Items and their order can be personalised by navigating the *Edit column*(D)

C. A drop-down filtration box for each column
- o Click *Filter by* or *Clear filter* to manage your preferred application list
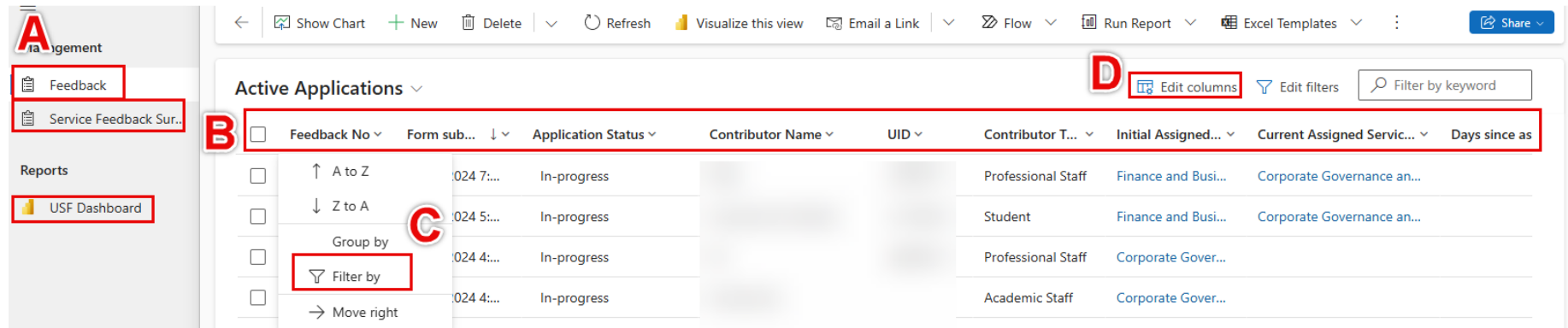
Customising Feedback Queue

The queue can be easily customised to assist with your workflow, all columns can be filtered, moved, removed or added by following the below example steps.

Edit Columns

- o   After clicking *Edit Column*, there will be a list popping up on the right of the screen.
- o   Clicking *Add column* If you want to check and select more Items for your column list.
- o   Clicking Reset to default when you do not need the added column Item.

- o   Add columns
  - •   Select the Items you want from this new list, and they will be added into the existing list. Close It otherwise.

- For the column items, you can drag them up and down to place them in the column order you prefer.

Please remember to click *Apply* every time when you attempt to make any changes and click *Cancel* otherwise.

Default setting

Active Applications ∨

Edit columns   Edit filters   [Filter by keyword]

	Feedback No	Form sub... ↓ ∨	Application Sta... ∨	Contributor Name ∨	UID ∨	Contributor Ty... ∨	Service ∨	New Assigned Service L... ∨	Days since assignm... ∨	Days since submissi... ∨
☐	USF-001055	18/07/2024 7:2...	In-progress			Professional Staff	Finance and Busin...	Corporate Governance and...		0 minutes
☐	USF-001052	18/07/2024 5:2...	In-progress			Student	Finance and Busin...	Corporate Governance and...		0 minutes
☐	USF-001051	18/07/2024 4:5...	In-progress			Professional Staff	Corporate Govern...			0 minutes
☐	USF-001049	18/07/2024 4:2...	In-progress			Academic Staff	Corporate Govern...			0 minutes
☐	USF-001048	18/07/2024 4:2...	In-progress			Academic Staff	Finance and Busin...	Other (I cannot find an op...		0 minutes
☐	USF-001046	18/07/2024 3:5...	In-progress			Student	Facilities & Services			0 minutes

After adding Status and moving it to the first column

Active Applications* ∨

Edit columns   Edit filters   [Filter by keyword]

	Status ∨	Feedback No ∨	Form sub... ↓ ∨	Application Sta... ∨	Contributor Name ∨	UID ∨	Contributor T... ∨	Service ∨	New Assigned Service L... ∨	Days since assign... ∨	Days si
☐	Active	USF-001055	18/07/2024 7:...	In-progress			Professional Staff	Finance and Busi...	Corporate Governance an...		1 day
☐	Active	USF-001052	18/07/2024 5:...	In-progress			Student	Finance and Busi...	Corporate Governance an...		1 day
☐	Active	USF-001051	18/07/2024 4:...	In-progress			Professional Staff	Corporate Gover...			1 day
☐	Active	USF-001049	18/07/2024 4:...	In-progress			Academic Staff	Corporate Gover...			1 day
☐	Active	USF-001048	18/07/2024 4:...	In-progress			Academic Staff	Finance and Busi...	Other (I cannot find an o...		1 day
☐	Active	USF-001046	18/07/2024 3:...	In-progress			Student	Facilities & Servic...			1 day

Saving and sharing a customised view

Once you have completed setting up a customized view, this can be saved for future use by selecting the queue name dropdown.

Saved views can also be shared with other team members by using the 'Manage and share' function found on the same dropdown.

Reviewing Feedback as Service Lead

Feedback Page

Please find the pending feedback item for your area from *Feedback – Current Assigned Service Area – Initial Assigned Service Area (if current blank)*, then click on the *Feedback No.* to proceed with your review.

You can also use the filter function on the specific column drop-down list introduced above to shortlist review items.

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General

Feedback Submissions

This section describes the general details about the feedback item, including the contributor details, contributor type and their service experience.

- The Service experience text will contain the free-text response from the contributor

Assign and Closure

This tab will contain the action functions for assigning and resolving a feedback item.

Reassignment

The reassignment section allows you to reassign the feedback item to the correct service area if it has not been properly attributed.

- You are shown the initial assigned service area
- You can choose whether to reassign the feedback to another service lead
    - If the feedback has already been reassigned this will already be marked as 'Yes'
- You can select a new service area using an autocomplete to change the 'Current assigned service area'
    - If the feedback has already been reassigned, this will already be populated. If it needs further reassignment, remove the populated service area and enter a new one
- You must leave comments if reassigning the form
    - If the feedback has already been reassigned this will be populated with the previous service lead's comments
- If you are reassigning the form, you must press **Save** to submit the reassignment (see the 'Submitting the form' section for more details).
- If you intend to look up the Service Area from the Service Area list, you can click the search button on the right.

Application Status Details

This section allows you to respond to the feedback item with the resolution details. See the "Submitting a Feedback Resolution" section of this guide for more details.

- If you have been correctly assigned the feedback item, you must confirm that you are the correct service lead in order to update the application status and complete the resolution

Application Status Details

Are you the new assigned Service Lead?	Yes
Application Status 🔒	In-progress
Resolution Description	---

Resolution Details

This section allows you to attach respondent information to the form to be copied on the outcome information.

- If the submission is out of scope, you must give a reason from the dropdown list. See the "Submitting a Feedback Resolution" section of this guide for more details. Otherwise, please select 'No' to proceed.

Resolution Details

Enter Respondent's Name	---
Enter Respondant's UID	---
Submission Out of Scope	---

Useful Links

This section will automatically populate with useful links based on the responses given in the rest of the form.

- This section may be blank or hidden depending on the responses given in the form.

Useful Links

This relates to academic progress and/or is to be dealt with under relevant *Academic progress.*

This feedback has not been made in good faith; is vexatious or malicious *Harmful Behaviours Disclosure Response and Support| Australian National University (anu.edu.au)*

This is a matter to be dealt with under the *Student Complaint Resolution Policy.*

This is a matter to be dealt with under the *Staff grievance* or *Unsatisfactory Performance and Misconduct Policy.*

Attachments

All uploaded attachments can be downloaded from this tab.

- To download a document, click on the document title and then the file name on the subsequent page.
- The New USF form attachment function for Service Lead and UP team is still under development.
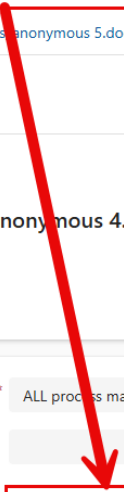
Uploading a new document

Clicking to upload a New USF Form Attachment will open the document page

- You must first give the document a title and press save
- You can then upload the document and save.
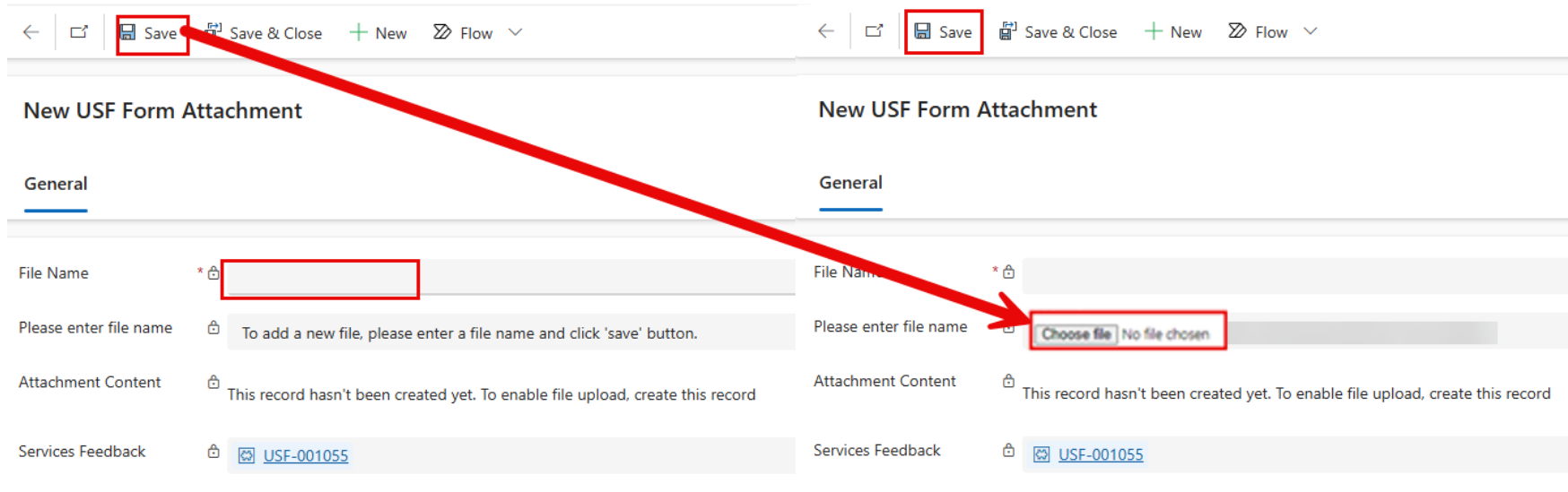
Feedback Timeline

This tab displays a timeline of feedback notes that have been left on the record and allows you to create new feedback notes.

This can also be used to easily upload documents to store on the record or share with other service area staff members.

Creating a feedback note

Clicking on the 'Enter a note' field will allow you to create a new feedback note.

- You must enter a title for the note
- You can optionally provide body text for the note
- You can optionally upload any document(s) of 10MB or less
- You must save the note by pressing 'Add note'

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Submitting a Feedback Resolution

To submit a feedback resolution after reviewing and updating all tabs of the feedback item, you must navigate to the **Assign and Closure** tab and the **Application Status Details** block.

- Please ensure that you are the correctly assigned Service Area before proceeding with submitting a resolution.

Application Status Details

Are you the new assigned Service Lead?	Yes **1**
Application Status 🔒	In-progress
Resolution Description	--- **2**

Resolution Details

Enter Respondent's Name	---
Enter Respondant's UID	--- **3**
Submission Out of Scope	--- **4**

1. You must nominate whether you are the correctly assigned Service Lead
2. You must provide a description of the resolution for this feedback item, this will be provided to the contributor
3. You may include the name and uid of the feedback respondent in order to be copied on the outcome details and provide contact details to the contributor.

4. You must respond to whether the submission is out of scope. If not, you must choose the "No" option.

Note: Useful links may populate to provide information based on your selection in this field.

Submitting the form

Click *Save* or *Save & Close* to submit the form.

Please note that this *Save* and *Save & Close* button will submit the resolution details or reassignment rather than saving the changes only.
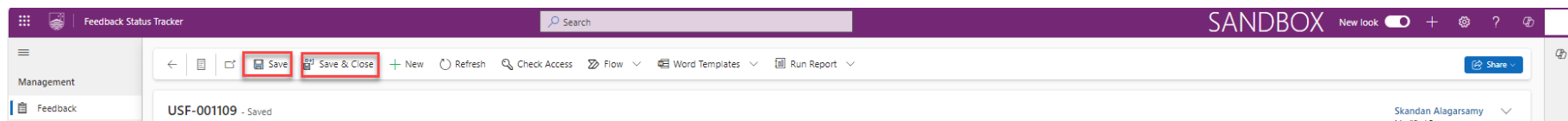
Summary of Automatic Emails

At various stages, the USF portal will send you automatic notification emails to inform you of a feedback item's status and alert when action is needed.

All email notifications will originate from the USF notifications inbox on behalf of the University Performance team, please do not reply directly to this inbox.

Email Content	Who will receive this email	When you will receive this email
Notification of Submission	Contributor (if contact provided), Service Area, or University Performance (if no Service Area is assigned)	When contributor submits a feedback item
Notice of Reassignment	Service Area or University Performance (if no Service Area is assigned)	When Service Area or University Performance reassigns a feedback item
Outcome and Rating	Contributor (if contact provided)	When Service Area or University Performance completes a resolution on a feedback item