Client Experience Tracking Form Quick Guide

Before Using the Form

☐ Watch our 5 min video tutorial that will walk you through the process of filling out the form by scanning the QR Code below.

☐ Familiarize yourself with the feedback categories on the form so that you will be ready to fill out the form when the time comes.

When Filling Out the Form

Open the Client Experience Tracker

☐ Tap on the green Client Experience Tracker icon on your tablet home screen to open the Client Experience Tracker.
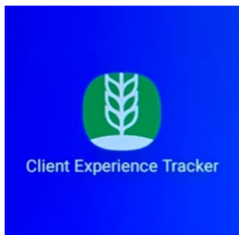
Client Information

☐ Though only the client's last name is required, it's also helpful for us to know the client ID or phone number because it will enable us to find the client's account when we begin the process of resolving the issue.

☐ If you do not know any of the client's contact information or their last name, if the feedback being reported doesn't relate to a specific client, or if the client involved doesn't wish to be identified, you may put *anonymous* or *unknown* in the "Last Name" section.

☐ Please also make sure to enter the preferred language of the client so that, if needed, we'll know who should call them back.

Site Location

☐ In the site location section, please begin to type and then choose the name of the distribution from the drop-down menu.

☐ If you don't know the name of the distribution, please describe the location to the best of your ability in the comments section.

☐ You may skip the "Campaign where incident took place" field.

☐ Please include the date the positive experience or issue took place and whether the client would like a call back. This will help us follow up with the client and provide them with further customer service.

Feedback Category

- Once you enter the client and site information, you can select the category or categories that this feedback is most closely related to.
- You may select multiple categories, but please try to limit the amount you select to 3 or fewer.
- If you are confused about which category the feedback might belong to, just select the one (or two) you feel best matches and try to describe it as accurately as you can in the comment section.

Case Origin

- In the Case Origin section, you will most likely select that this issue or feedback was an "Observation at Site," since you will be filling this out on a tablet while at a distribution.

Comments

- Please provide as much detail as you can about the issue or experience you are reporting, including what happened, who was involved, and any action that was taken while onsite to try to address the concern.
- For issues, this section is perhaps the most important, because it will help us understand what next steps are necessary to resolve the situation and make sure that we follow up thoroughly. The more detail, the better.

Volunteer/Staff contact information

- If you are comfortable entering your name and contact information, please do so in the final section.
- This is only in case we have some follow-up questions for you, or you indicate in the comments section that you would like us to let you know how we will be addressing the situation.
- It is also OK if you wish to leave this section blank.

Submit the Client Experience

- Click the orange submit button. You will see the orange button change to "Please wait…" and then will be directed to a message thanking you for your submission.
- You may submit another client experience to the tracker by clicking the link provided.

Exit the Client Experience Tracker

- To exit the Client Experience Tracker at any time, click on the home icon. This will return you to your tablet's home screen.