Guidelines

Title:	Customer Service and Response Guidelines
Related to:	ODHSOHA 010-033 Customer Service and Response Policy
Effective date:	11/01/2025

Purpose

These guidelines are designed to support program and unit implementation of the Customer Service and Response Policy and support the creation and implementation of agency Customer Service Strategy.

Guidelines

1. The ODHSOHA Customer Service and Response policy requires a one-business day acknowledgment to all customer interactions, regardless of how contact is initiated and includes but is not limited to contact initiated by email, text, instant message, or phone. Customers include coworkers.
2. Responses are not required for phishing, spam, newsletters, information only emails, threatening or hostile contacts, etc. Threatening contacts should be reported to OHSE using the Workday incident reporting system.
3. Staff should use their best judgment for responding based on the intent of the contact, the ODHS and OHA Customer Service and Response policy, and the Department of Administrative Services expectations around quality customer service for all Oregon state agencies.
4. The agencies recommend each staff member or team consider the following options as ways to meet the one-day acknowledgement requirement and support quality customer service. The choice made by individuals, teams, or programs will depend on their workstyle, established workflows, capacity, leadership directives, statutory timelines, etc. The following are **options** for the one-day acknowledgment regardless of how contact is initiated.
    a. An auto reply or message (including voicemail) that is updated on a daily or weekly basis that provides up-to-date information about the individual's schedule and when the customer can expect a more personal response.
        A. Staff who work alternative schedules such as four 10-hour days should include that information in their auto reply
        B. For auto replies or messages related to an individual's planned time out of office, such as vacation or protected leave, the message should include an expected date of return and at least one alternate contact.
        C. For unexpected absences of more than five workdays, the manager of affected staff should work with OIS to set an appropriate auto reply to the extent possible.
        D. Outlook allows auto replies to be set up for internal response, external response, or both. When staff are in office, they should consider setting up auto reply only to respond to external customers.

b. A personal response to an initial contact or additional auto response information may be a response that:
    A. Provides or requests additional information or a referral.
    B. Resolves the customer's issue.
    C. Provides timeline information for additional or final response.
    D. Provides an alternate contact method or individual for urgent requests.

5. Within five business days of the acknowledgment, staff should establish anticipated timelines for completion of the response. Completion timelines vary but for programs without timelines established in federal or state statute or rule, collective bargaining agreements or other agency policy or processes such as procurement, the following are recommended:
    a. Completing most interactions within 15 business days.
    b. Completing almost all interactions within 30 business days.
    c. Providing information about current timelines based on the volume of work being processed and information being processed in the order it is received.
    d. Providing a link to a webpage that sets standards timelines and outlines any current delays related to systems issues, staffing, or unexpected call volume.
    e. Providing routine status updates, if appropriate, especially when completion timelines will extend beyond 30 business days.
6. An interaction is complete when the information requested in the initial contact is provided, even if that leads to additional contacts creating new tasks to be resolved for the same individual before a final resolution.
    a. Additional contacts create renewed timelines.
    b. Even when multiple tasks are involved in resolving individual issues, staff should attempt to close interactions with individuals within 30 days, or otherwise established timelines.

References

Oregon Enterprise Values and Competencies
DAS 107-001-040 Enterprise Customer Service Standards
DAS 50.010.03 Maintaining a Professional Workplace
ODHS Customer Service Website
OHA Customer Service Website

Forms referenced

Related policies

ODHS 010-022 Trauma Informed Organization Policy
ODHS 010-033-02 Customer Service Complaint Process
OHA 010-022 Organizational Resilience and Healing Approach
OHA 010-033-02 Customer Service Complaint Process
ODHSOHA 010-013 Auxiliary Aids, Alternate Formats, and Language Access Services
ODHSOHA 010-029 Digital Accessibility in Content Creation and Sharing
ODHSOHA 010-030 Digital Accessibility in Hardware, Software and Systems
ODHSOHA 010-033 Customer Service and Response Policy
ODHSOHA 010-033-02 Best Practices: Response Scripts for Phone and Email
ODHSOHA 010-034 Email Signatures and Auto Replies Policy
ODHSOHA 080-013 Employee Wellness Policy

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