VOICE TRANSFERS GUIDELINES

You should not transfer anything that you are trained to work with:

If I am voice skilled what can I do?
Mortgage Change
Lender Verification
Document requests
Confirmation that a payment has been received
Send invoice, dec, epi, checklist of coverage
Send receipt for payment confirmation for payment that was already submitted
Verification that email or document was received
Make a change in AMS
Provide information to the carrier if requested and they are authenticated

What should I not work no matter the skill?
Work an auto policy
Send anything to the AOR on the policy
Interpret or consult on coverages
If you are unsure if you should work something what do you do?
Reach out to T2 via chats for assistance.

***Please note that transferring a request that you are trained/skilled to work is considered **work avoidance** and it's subject to corrective actions. These instances are being tracked individually at the agent level.

Mortgage Change/Banks Skills

These call or policy types should be warm transferred:

- New Business: quotes, adding an additional LOB, reshop, rewrite. (IB Advisor->AOR)
- In-depth Billing Questions/Requests (IB FL/Non-FL)
- In-depth Coverage Questions//Requests (IB FL/Non-FL)
- In-depth Auto Policies Questions/Requests (IB FL Auto/IB Non-FL Auto/IB Michigan Auto)
- Payment Requests (IB Payment)
- Policy in New York (IB New York)
- Agency Billed (IB Commercial Agency Billed)
- Commercial (IB Commercial)
- VIP Accounts (VIP Skill Indicated by GUI)
- Spanish (Spanish) (Cold)

Transferring to another skill

When transferring a call to another skill, be sure to check if there are calls in queue. You can do this by clicking the button on max agent below:

Then search the queue you're looking to transfer to and see how many are in queue.

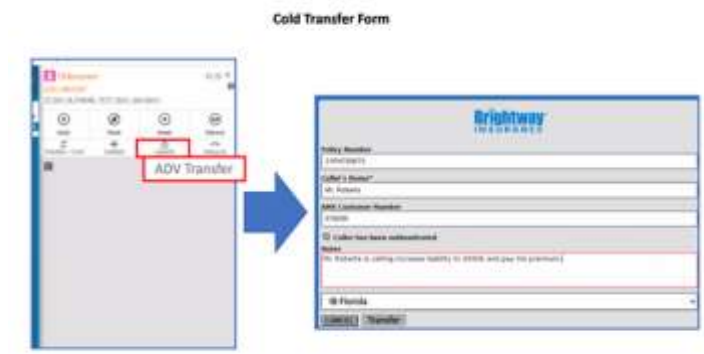
If there are calls in queue, please let the caller know that they will be placed into that queue and the next available rep will
assist them. Advise the caller of the possible wait time as well.

As a general reference, when a call is transferred to another skill, that transferred caller takes
priority over the other calls in the skill **(please do not communicate this to the customer, this is a general tip for the service center.)**

Cold Transfer Form Procedure/ADV Transfer

The cold transfer form lets you communicate some important details about the call to the next representative who will help this caller. This form helps us provide the best experience for our callers because it prevents the caller needing to repeat themselves.

1. From your MAX agent soft phone, click **Launch -> ADV Transfer.**



2. The advanced transfer form will be opened. The form may be blank, or some information may have been pre-filled by the phone system.

3. Fill in each of the fields using the available information for the customer from GUI/AMS

- **Policy Number** – the policy number for the policy that the call is in reference to
    - If the caller could not provide the policy number and it could not be found in GUI/AMS, leave it blank.
- **Caller's name** – the name of the caller as stated by the caller.
    - This is not necessarily the insured customer if it is someone calling on behalf of the customer. For example, if this is Linda calling from Chase Bank about a customer named John, you would put "Linda from Chase Bank."
- **AMS Customer Number** – the customer number you located in GUI/AMS when looking up the customer account.
    - If a customer could not be located, leave it blank.
- **Caller has been authenticated-** check this box if you were able to verify the caller by confirming the policyholder's name and address.

- It is important to check this box if the caller is verified, as it will alert the next representative not to re-verify the customer's information.
    - It is important NOT to check the box if caller could not be verified.
- **Notes** – a brief description of the caller's stated reason for calling. Some examples:
    - Questions about a renewal letter they received.
    - Needs to remove a vehicle from their auto policy.
    - Calling to update mortgage information
- **Transfer Skill** – Select the skill to transfer.

4. Click the **Transfer** button at the bottom of the form. The call will immediately transfer and end for you after the transfer button is clicked.

You can also fill out the ADV Transfer form, and cold transfer after waiting for the next department for 5 minutes.

TOOLS TO USE:

- **Wiki/Outplex Manual**
- **GUI:** it will give you useful pop-ups and guidance about what to transfer and where.
- Consult with your **TM** and local leadership before transfering.
- **T2 chat:** if instructed by your TM to obtain assistance.