Purpose

The purpose of this SOP is to serve as a reference for all team members on the use of Break and Worktime reasons in Touchpoint.

Teams Impacted

- Claims
- Customer Service
- Vendor Management
- Payments
- Client Relations

Procedure

1. Break Reasons in Touchpoint

The following codes are to be utilized when the schedule is coded for break or lunch events.

    a. 15 Minute Break

    b. 5 Minute Break

    c. 30 Minute Lunch

    d. 60 Minute Lunch

    e. System Issues – if an agent is experiencing system issues, and able to utilize touchpoint, they should use this code while troubleshooting the issue.

The option to type in a custom break reason will no longer be available.

2. Worktime Reasons in Touchpoint

    a. Worktime – used when the agent requires offline work. Agents should remain in aftercall when while completing work for inbound or outbound contact.

The option to type in a custom note will no longer be available.

3. Meeting Reasons in Touchpoint

This code is to be utilized during the indicated event:

    a. Meeting – scheduled or ad hoc meetings.

    b. Training – scheduled training events.

    c. Coaching – Schedule or ad hoc coaching with team lead.

The option to type in a custom note will no longer be available.

Approval & Revision

Date Created 6/4/2024	Created By Jason Dolan		Date Approved 6/7/2024	Approved By Charles (Chuck) Dunn
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]