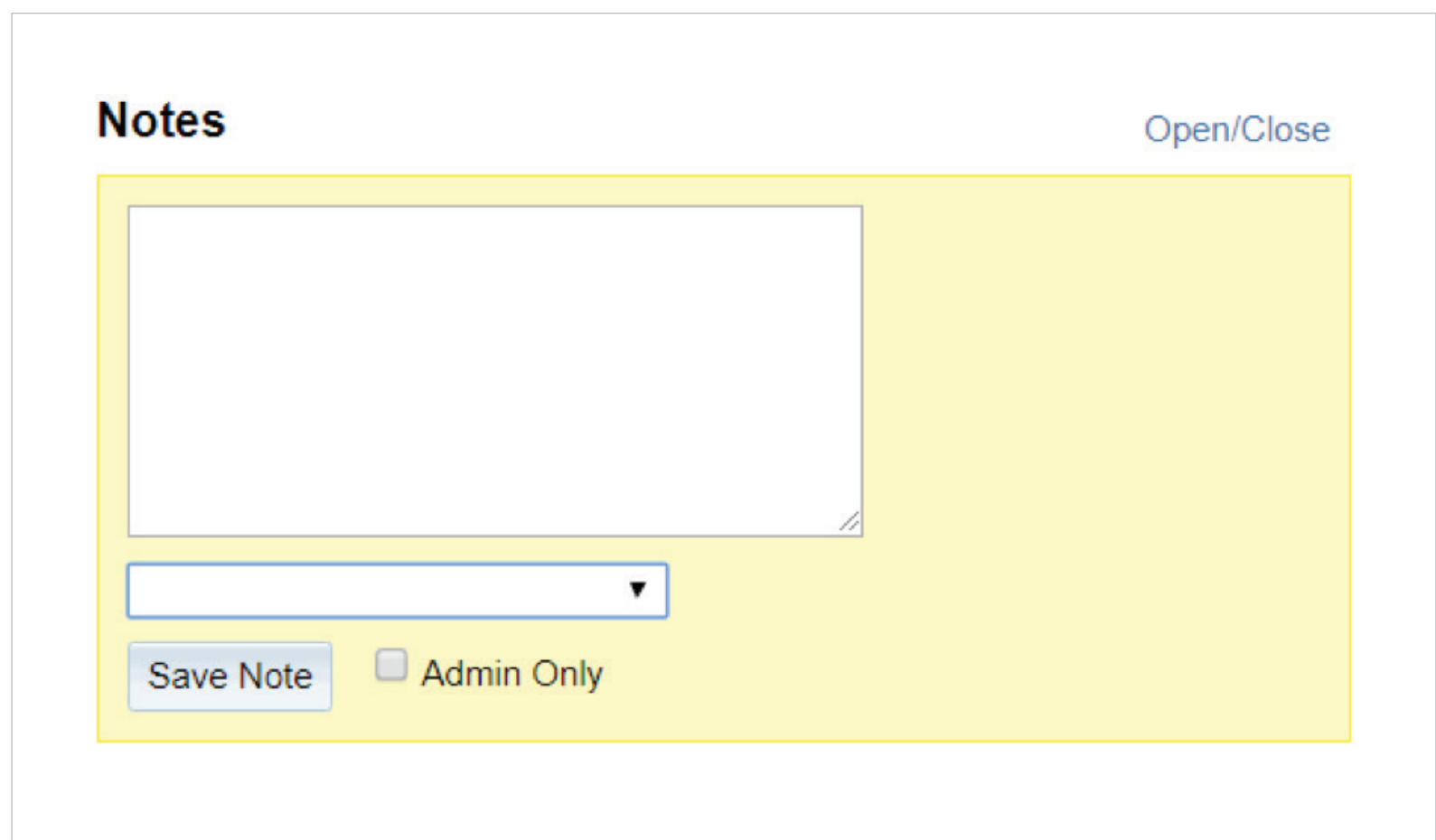


# New Member Records Menu Options

\$today\_long

Attention Agents,

Effective February 5th, there will be additional options in the drop-down menu (see below) under the Notes Section in the member record. **You can view the member record by selecting the Member's Tab in the top right corner of your back office, then select the member ID number.**

A screenshot of a web application interface. At the top left, the word "Notes" is displayed in bold black text. At the top right, the text "Open/Close" is displayed in blue. Below "Notes" is a large, empty white rectangular box with a thin grey border. To the right of this box is a yellow rectangular area. Below the white box is a white dropdown menu with a black downward arrow on the right side. Below the dropdown menu is a blue button with the text "Save Note" in white. To the right of the button is a checkbox followed by the text "Admin Only".

These new options begin with the word "Survey" and give you the option to send the member a Customer Satisfaction Survey, based on what you are talking to the member about. For example, if the member is calling about billing, you would select the note type "Survey – Billing" from the drop- down menu. If you are discussing benefits with the member, you would select "Survey-Benefits".

You are not required to send a survey to the member – this is available only if you wish to send the member the survey. A list of the new drop-down menu items is located below for your reference.

In addition, a copy of the Member Satisfaction Survey is located below. It will be helpful to use this customer feedback on an ongoing basis to improve our services and products.

[New Drop-Down Menu Options](#)

[Member Satisfaction Survey](#)

If you have any questions, please contact Agent Services or 800-319-7061.

Thank you,  
Your Agent Service Team