Customer Service | Call Flow Work Instruction (WI)

The following Work Instruction (WI) is for the Call Flow Overview process for a Customer Service center. This is based off a project from a previous client. All proprietary information and system screenshots have been redacted or replaced with generic terms and placeholder icons.

Company Logo Here	**CS-WI-###**	Call Flow Overview		
	Effective	[MM/DD/YYYY]	**Revision**	1.0

OBJECTIVE:

The purpose of this Work Instruction (WI) is to assist the Customer Service Representative (CSR) on the proper steps to facilitate a customer call for the following reasons: eligibility/enrollment, benefits, and claims.

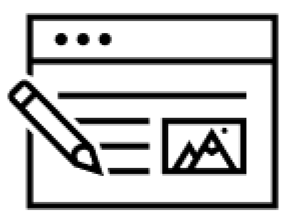
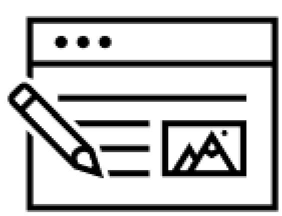
SCOPE:

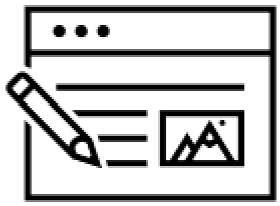
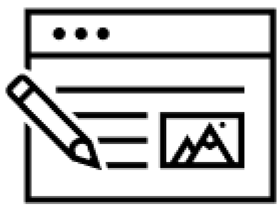
This Work Instruction applies to all CSRs that receive incoming calls from the following customer: providers, subscribers, and employers.

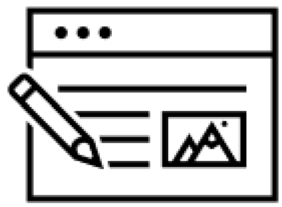
Section A. Call Flow Procedure

Part 1. Opening Calls

The purpose of this section is to establish the opening dialogue for an incoming customer call. Follow the steps below to best serve the customer and verify their information before proceeding with their request.

#	Step	Action
1	Pre-operation tasks	• Set your status to “Available” to begin taking calls. 
2	Receive incoming call	• Answer the call by picking up on the phone headset, or by clicking the “Pick Up” button on the screen.  • Answer the phone by using the following dialogue: *“Thank you for calling Customer Service, how may I help you?”*

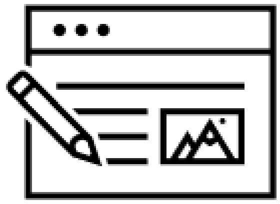
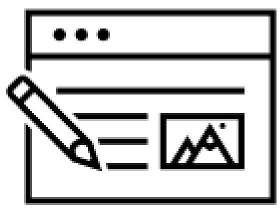
3	Respond to customer's request	• The customer may respond with his/her request, it is the operator's responsibility to listen actively and take ownership of the call. **<u>Example Dialogue:</u>** *"I can look into that for you…"* OR *"Of course, I can help you with that…"*
4	Select the type of customer calling	• Using the Up/Down arrow keys, select the type of customer calling in the [Redacted] System. • Press the Enter key to continue. **NOTE:** Options 4) through 7) are not used to begin call session. 
5	Select "Incoming…"	• Select the type of call as "Incoming…" then press the Enter key. 
6	Authenticate the caller	• Begin the authentication process by asking the caller questions based on the type of customer calling (refer to **<u>CS-WI-### Authenticating the Customer</u>** for additional instructions on this process. **<u>Example Dialogue:</u>** *"May I have the member's ID number?"* *"May I have the member's full name and date of birth, please?"* *"What is the best number to reach you at in case our call gets disconnected…Is there an extension number for this callback number?"*

7	Document caller information	• Press [redacted] key to open the Notes screen and begin documenting. Enter the following information: • Customer Service Representative Initials followed by the Operator ID # • Type of caller (provider, subscriber or employer) • Phone number (add extension if applicable) • Reason for the call 
8	Verify reason for the call	• Once the customer's information is authenticated, proceed to verify the reason for the call. The customer may be calling for the following: • Eligibility/Enrollment • Benefits • Claim Status • Etc. **Example Dialogue:** "How may I help you today, *insert customer name here*?"
9	Check for the customer's eligibility	• Check for HIPAA form (if applicable) • Check the plan effective date • Check the date of service (DOS)
10	Research a resolution for the customer	For specific call scenario procedures refer to additional Work Instructions, Job Aids, or SOPs in SharePoint. **Examples:** • CS-WI-### Benefits Calls • CS-WI-### Eligibility Calls • CS-WI-### Claims Call Overview

Part 2. Closing Calls

The purpose of this section is to establish closing dialogue for a customer call. Follow the steps below to best serve the customer and complete call notes before closing the call.

#	Step	Action
1	Ask customer if they need additional assistance	• When the customer's request is complete, ask if there is anything else they need assistance with. **Example Dialogue:** *"Is there anything else that I can help you with today *insert customer name here*?"*
2	Offer reference number and end conversation	• Offer a reference number for the call before ending the conversation. • If the customer does not have any other questions, end the conversation with the following dialogue or similar: *"Thank you for calling customer service and have a good day."*

3	Select “End Call”	• Complete the call notes for the patient in the system and press NumLock+0. • Use the Up/Down arrow keys to select “End Call” then press the Enter key. **NOTE:** Customer Service Representatives do NOT hang up; wait for the customer to hang up the phone. The only exception to terminating a call is if the caller fails to disconnect. 
4	Enter and confirm Tally Codes	• Enter the Tally Code as applicable for the call then press the Enter key (examples below). • Confirm the Tally Category I.D. then press the Enter key. **NOTE:** If the incorrect Tally is selected, send an e-mail to [redacted] to update the correct Tally. 
5	Document under another suffix	The next question that will appear on the screen is, “Would you like to document under another suffix?” • If Yes (Y)…Then press the letter ‘Y’ then answer the question, would you like to keep original notes from the first suffix?” • If No (N)…Then press the letter ‘N’ to advance to the next screen. If documenting under other suffix, choose another member from the list of subscriber and dependents, then press the Enter key.
6	Forwarding calls	The forwarding calls screen will then ask, “Would you like to forward this call?” • If Yes (Y)…Then press the letter ‘Y’ then enter the three-digit operator number on the next screen and press the Enter key. • If No (N)…Then press the letter ‘N’ to advance to the next screen.
7	Tag call as complete	Answer the last question to complete the call, “Would you like to tag this call as complete?” • If Yes (Y)…Then press the letter ‘Y’ to navigate back to the main call screen. • If No (N)…Then press the letter ‘N’ to advance to the next screen.
8	Complete call and return to the main call screen	• When a call is tagged as complete, it will automatically return to the main call screen.

Section B. Reference Documents

Document Number	**Document Title**
CS-WI-###	Authenticating the Customer
CS-WI-###	Benefits Calls
CS-WI-###	Eligibility Calls

Section C. Revision History

Revision and Date	Author	Description of Changes	Justification of Changes
1.0 [MM/DD/YYYY]	Kendra Johng	New Document	Created new Work Instruction to document the Call Flow Overview process.