Documentation

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | 1 |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | 2 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  | 3 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | 4 |  |  |  |  |  |
|  |  |  |  | 5 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | 6 |  |  |  | 7 |  |  |  | 8 |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | 9 |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | 10 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  | 11 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | 12 |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  | 13 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  | 14 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  | 15 |  | 16 |  |  |  |  | 17 |  |  |  |  |  |  | 18 |  |  |  |  |  |  |  |  |  |
|  |  |  |  | 19 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | 20 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  | 21 |  |  |  |  |  |  |  |  | 22 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | 23 |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  | 24 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  | 25 |  |  |  |  |  |  |  |  |  |  |  |  |

|  |  |
| --- | --- |
| **Across**  **3.** When ni request cancel and you leave vm for aor or send agency notification you will need to \_\_\_\_\_\_\_\_day/time you attempted to contact aor and phone number and time the member would like to be called back.  **5.** You need to document if a call \_\_\_\_\_\_\_\_\_\_\_ and OBC was unsuccessful.  **9.** You do not need to document when taking a payment in zoom or sending an \_\_\_\_\_ through zoom because it auto documents the policy.  **11.** If you navigate from the Notes tab to either Search or Customer Highlights once information has already auto-populated, the data is lost and you’ll need to input the information manually. This is a limitation with \_\_\_\_\_\_  **13.** When making other changes \_\_\_\_\_\_\_ of what auto documents, you will need to document (ex: increase deductible, add discount, etc.)  **15.** When call disconnects and obc was \_\_\_\_\_\_\_\_\_\_ and the reason for the call was resolved, it is not necessary to notate call was disconnected and obc was made.  **18.** You need to document when generating and/or \_\_\_\_\_\_\_POI/MOI to the caller  **20.** What do you need to notate when exclude/delete driver?  **21.** Providing information NOT \_\_\_\_\_\_\_ on the policy and/or billing system will need to be documented (ex. Quote or calculations)  **22.** You need to document when \_\_\_\_\_\_\_\_ form is sent  **24.** The Interaction Management Client won't function properly when multiple tabs are open if ZOOM is not the first tab and first application. If you’ve opened another tab/application prior to ZOOM, you need to close all tabs, re-launch IE8, and open ZOOM as the first tab. Dragging ZOOM to the first tab does not fix the issue. Zoom needs to be the first \_\_\_\_\_\_\_\_\_\_\_ on the task bar after the Start button.  **25.** MCRs should document when a \_\_\_ referral is sent to servicing associates. | **Down**  **1.** A BAM History Comment is needed when a Billing Advantage \_\_\_\_\_\_\_ is taken through BAM and not ZOOM.  **2.** If coverage is not the same, document the coverages that are specifically different and/or \_\_\_\_\_\_\_\_\_\_ coverages selected  **4.** Documentation is need when ni does not want to speak with aor for \_\_\_\_\_\_\_\_\_\_\_  **6.** You do not need to document when the caller was only \_\_\_\_\_\_\_\_ and transferred to another department (i.e. Titan, PCIO, etc.) and no action was taken on the policy or billing account.  **7.** \_\_\_\_\_\_\_\_\_\_ processes and information provided during payment calls still needs to be documented (ex: added youthful driver, coverage explanation, etc.)  **8.** When ni request to cancel policy and you warm transfer to aor you will need to document what?  **10.** Associates do not need to add \_\_\_\_\_\_ notes to describe details of the discussion or processed changes that are automatically documented or visible on the policy or billing account. Unless otherwise noted to document the policy/account is stated on the process page  **12.** When ni request to cancel what is the main thing you should document always?  **14.** When quoting to add/replace vehicle, document: VIN, year/make of vehicle if generic rate symbol used, and \_\_\_\_ of quote if appropriate.  **16.** It is acceptable to add additional notes to the standard form notes for any call type when the situation is more \_\_\_\_\_\_\_ and additional information is needed.  **17.** Any \_\_\_\_\_\_\_\_ work with caller via email, OBC, etc. would need to be documented even if no changes were made  **19.** A BAM History Comment is needed when \_\_\_\_\_\_ money within the account.  **23.** If the coverage is the \_\_\_\_, document "same coverage/deductibles" |