Documentation

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| **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" |