MEM – CC – Creating and Completing Contact Logs

Purpose:
This procedure explains the process of how to create and complete a contact log for Contact Center-related calls.

Identification of Roles:
Operations Manager (OM)
Customer Service Representative (CSR)

Performance Standards:
The Member Services / Contact Center Customer Service Representatives (CSRs) are responsible for responding to 80% of calls within 30 seconds of the call entering the appropriate queue. Quality Assurance for all Member Services calls must be at least 90%. However, enrollment should be completed correctly 100% of the time.

Path of Business Procedure:
Step 1: Calls are routed by an Automated Call Distributer (ACD) into an enrollment queue and answered by the next available CSR.

Step 2: CSR access the member's file and will verify that the caller is Health Insurance Portability and Accountability Act of 1996 (HIPAA) authorized to obtain information and/or make changes to the member's file.

a. Verify the person calling is listed as the member, the case name or the name in Social Services Number Information (SSNI).
b. Verify the mailing address on file.
c. Request the caller's current phone number.

Step 3: CSR will create a contact log in OnBase.

a. Click 'Create' and then click 'Helpdesk Contact Log' in Workview.
b. Enter the caller's name (first and last) and phone number. Phone number must include area code.
c. Enter the caller's State ID number if they have one.
d. The 'Contact Reason' is a required field. Click the dropdown and choose the most appropriate 'Contact Reason'. This field must be selected before continuing to 'e'.
e. The 'Detailed Reason' is also a required field. Select the most appropriate 'Detailed Reason' that fits with your 'Contact Reason.'
f. You must also select either DHS Contact Center or ELIAS Level 1 Helpdesk.
g. 'Type of Request' should only be selected if a follow-up is needed.
h. Type in full narration of the call:

1. Enter the caller's questions
2. Your answers should only use abbreviations that are on the approved abbreviations list (See Approved Abbreviations List).
3. Any requests you made for publications, specify the publication you ordered (Application, Right to Appeal, Wellness Brochure, etc.).
4. The time frame you gave the member for any publications to be sent.

i. Once you have completed the Contact Log, click the 'Save' and 'New' or the 'Save' and 'Close' buttons on the top of the screen.

Forms/Reports:

N/A

RFP References:

N/A

Interfaces:

OnBase
SSNI

Attachments:

N/A