Policy CS-125   CSS to RSS call transfer scripting

Department	CSS (Customer Service Specialist) & RSS (Remote Service Support)
Effective Date	10/10/22
Version Number	10072022
Last Revised	10/7/22

Purpose/Policy Introduction

Our goal at NSM is to provide exceptional service to our clients. In the scenario of a client with a new repair need has placed a call and selected a prompt reaching Customer Service, the expectation is to transfer them to Remote Service Support using the documented policy and procedure.

Policy

All CSS team members must use the following scripting when a client has called in and has been identified as someone with a new repair that needs to be transferred to Remote Service Support.

Procedure

- Create a work order, verify demographics, current physician, insurance eligibility, and make/model/DOP
- Notate the stated repair need and client interaction in the Notes field of the work order.
- Transferring call to Remote Service Support via option 6 sub option 2 in the phone menu.
  - **Do not transfer call directly to Technician**

Note:
- Client must be with equipment
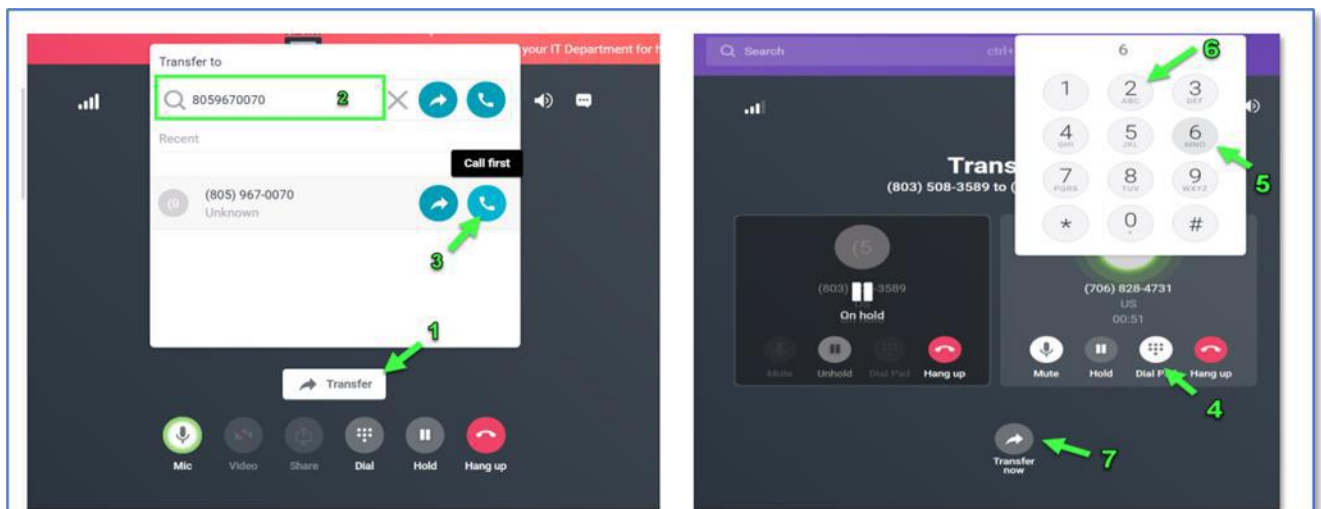- Do not use previous/closed work order

Transfer Scripting

Mr. or Mrs. (client name) I am going to transfer you over to our Technician team to evaluate your equipment and address these issues. They will perform a multi-point inspection via video call if anyone present has a smart phone but can do so verbally as well if that is not possible. Your work order number is (state work order #). Please have that ready when you speak with them.

While you are on hold you can press 0 at any time to leave a voicemail. If you are on hold for more than five minutes the system will go to voicemail for you to receive a callback. Please leave your work order number on the message. Please allow time for call back as we are experiencing high call volumes. You should receive a callback by the end of day.

It is possible when receiving a call back, for the number to display as out of state and/or spam

How to transfer call to RSS

1. Click "Transfer"
2. Enter your branch phone number
3. Click "Call First"

4. Select the Dial Pad
5. Enter 6 for Repairs
6. Enter 2 for New Repair
7. Click "Transfer now"

Definitions

Term	Definition
CSS	Customer Service Specialist
RSS	Remote Service Support
DOP	Date of purchase
Demographics	Date of birth, current address, phone numbers, emergency contact, etc.