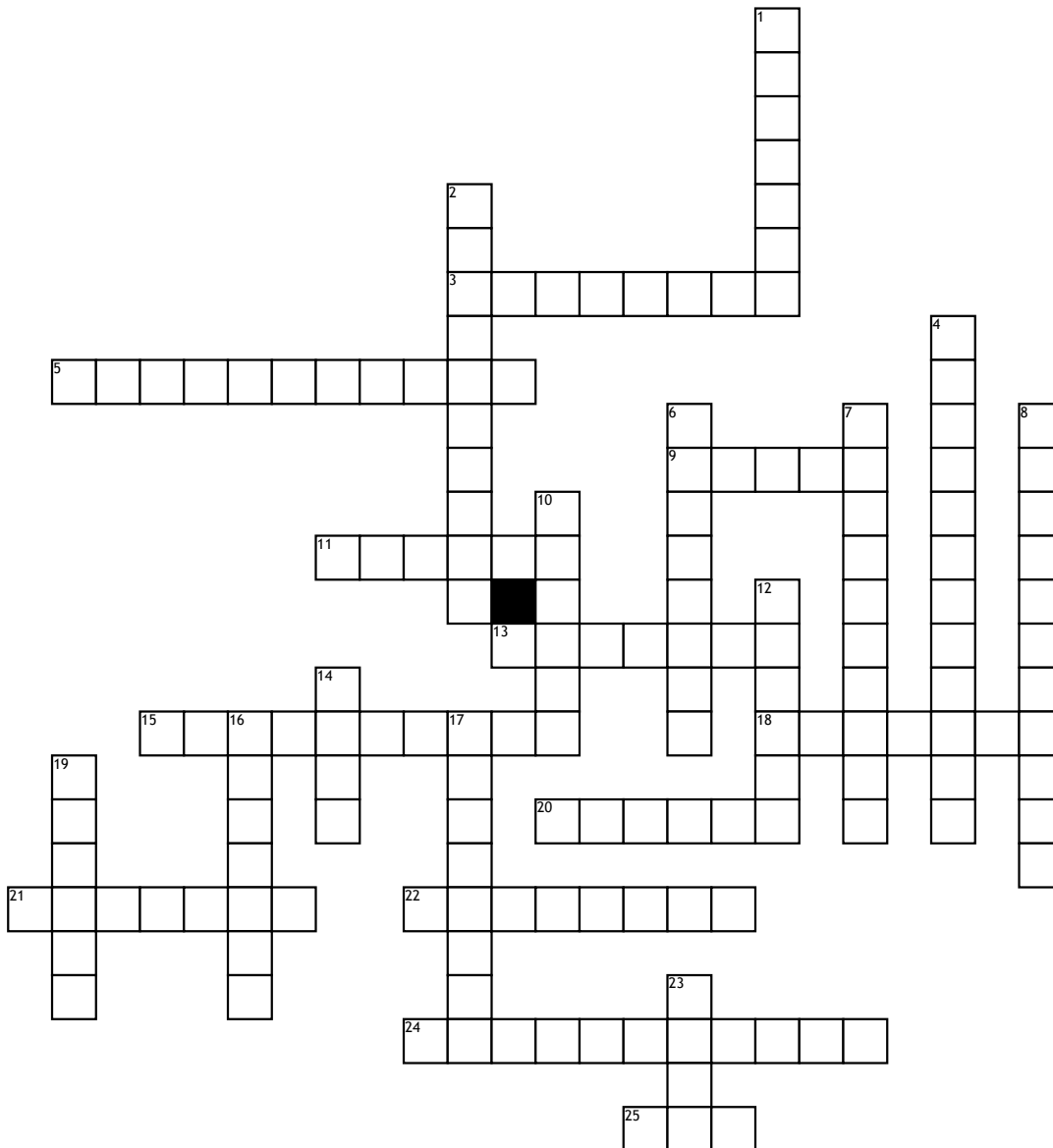


Documentation



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 deductibles, 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 needed 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"