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| **Checklist 5—Customer Service** | **Project Assigned To** | **Date Completed** | **Completed By** | **Notes** |
| ***Phones*** |  |  |  |  |
| Meet with insurer’s manager for the customer services section to discuss the insurer’s procedures, staffing and duties required as a result of the order. |  |  |  |  |
| Interview the customer services manager (and/or other personnel as appropriate) to discuss the insurer’s customer services functions and operations to determine how phones, e-mail requests, etc., are handled by the insurer. Document same. Be sure to obtain information regarding the insurer’s night/weekend answering service and automated call distribution system (ACD). |  |  |  |  |
| Meet with the insurer’s customer service representatives to inform them of the receivership processes and take control of the customer service process. |  |  |  |  |
| Secure switchboard. |  |  |  |  |
| Secure account numbers for phone lines. |  |  |  |  |
| Obtain customer service representatives’ passwords for ACD and other systems so as to ensure that the receiver has full access and rights to any ACD system. |  |  |  |  |
| Meet with insurer’s phone programmer—adjust outgoing phone message. |  |  |  |  |
| Distribute prepared phone script, provider refusal forms, accord forms, etc. |  |  |  |  |
| Train customer service reps on phone script, advising that all responses to inquiries are to be consistent with information on script. |  |  |  |  |
| Increase the number of call senter staff to handle incoming calls, if necessary. |  |  |  |  |

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| **Checklist 5—Customer Service** | **Project Assigned To** | **Date Completed** | **Completed By** | **Notes** |
| Take advantage of large agent network, if applicable, to provide a mass email and physical mailing of key information to active agents. |  |  |  |  |
| Determine need for bilingual reps. |  |  |  |  |
| Determine need to maintain phone logs to determine types and number of calls, types of questions raised and need for additional types and updated scripted responses so that the information is current and meaningful. |  |  |  |  |
| Obtain Department of Insurance complaint logs. |  |  |  |  |
| Establish and monitor dedicated phone line. |  |  |  |  |
| Review customer service representative’s daily/hourly logs. |  |  |  |  |
| Manage customer service representative’s phone/time schedules. |  |  |  |  |
| Monitor backlogs, or development thereof, and determine how to minimize/control. |  |  |  |  |
| Modify instructions to night/weekend answering service as needed. |  |  |  |  |
| ***Web site*** |  |  |  |  |
| Provide copy of phone script to Webmaster for inclusion on Web sites. |  |  |  |  |
| Provide Webmaster with other information to be posted on Web sites. |  |  |  |  |
| Develop, post to the website and maintain Frequently Asked Questions (FAQs) for the public. |  |  |  |  |
| Provide information to the possible electronic filing of proof of claim (Claim Net), as appropriate. |  |  |  |  |
| Monitor/distribute for response any consumer inquiries received via Web site. |  |  |  |  |