

CALL CENTER AGENT

# CCA QUICK REFERENCE GUIDE



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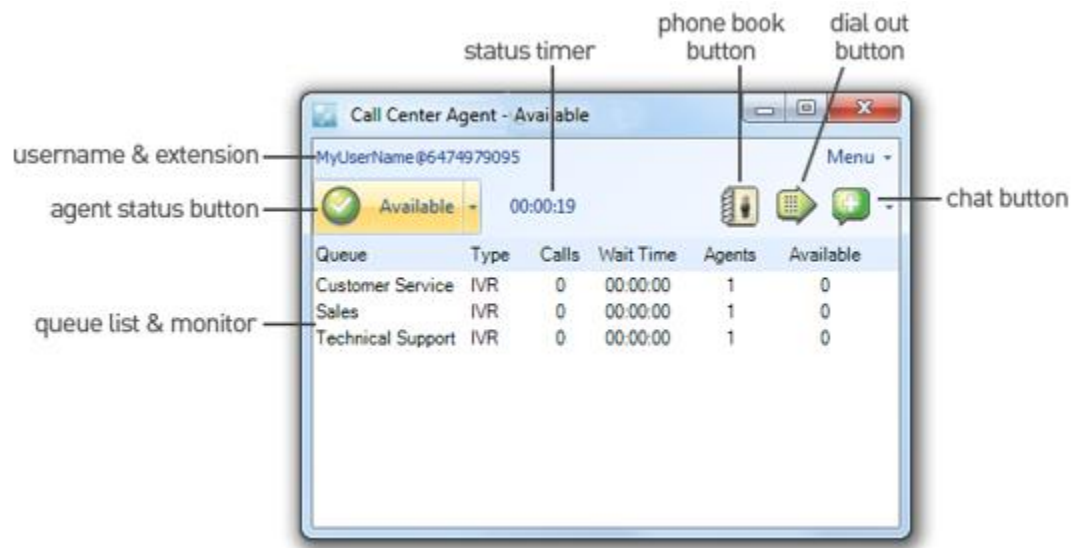
## CALL CENTER AGENT

# CCA QUICK REFERENCE GUIDE

This document describes how to use the Call Center Agent v10.3

**Bold type** represents screen names and items within the administrator portal.

## BUTTONS DISPLAY



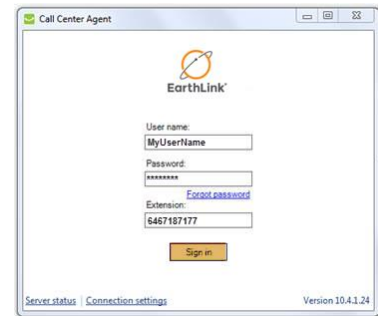
## 1. OPEN THE CALL CENTER AGENT

Start by launching the Call Center Agent from your Desktop Shortcut or navigate to **Start menu > All Programs > Call Center Agent**.

A **sign-in** window will open asking for three items, your **Username**, **Password**, and **Extension**. Your username and password should be provided to you before your first login, only your password is case sensitive.

In the **Extension** field, simply enter the **10 digit phone number** where you wish to receive calls – do not use any hyphens, letters, or special characters. Click **Sign in**.

**Note:** If you are having difficulty logging in, see [Connection Settings](#).

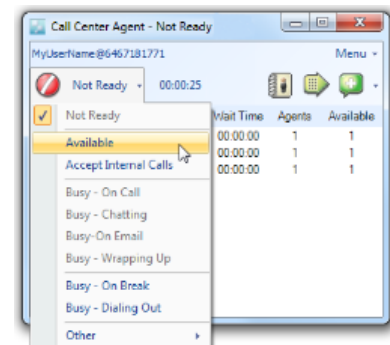


## 2. SWITCH YOUR AGENT STATUS TO AVAILABLE

When the application opens, the **display** window will list the **queue(s)** you are qualified to handle as well as the number of calls waiting in each queue. Your **agent status** will begin as **Not Ready**.

In order to receive calls in **queue(s)**, you must change your **agent status** to **Available**. To do this you can either click **agent status** once, or use the drop down menu and select **Available**.

**Note:** Available is the only **agent status** which can receive calls in queue.

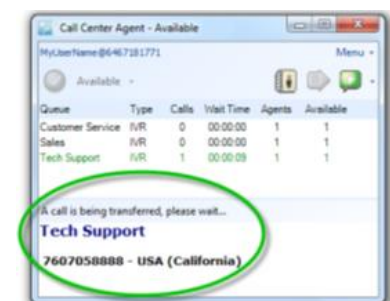


## 3. ACCEPT A CALL

The CCA will automatically come into focus when you are receiving a call. The display will show the **queue name** as well as the **caller ID** if available.

Accept the call by answering your phone; at this point the CCA will automatically adjust your **agent status** to **Busy – On Call**. Similarly when your call is over, hang up your phone and the CCA will automatically change your status to **Busy – Wrapping Up**, see [step 4](#).

**Note:** If you do not answer your phone in time, your **agent status** will automatically change to **Not Ready** and you will receive the following message: **Operation timed out (ring no-answer)**.



## 4. WRAPPING UP

After a call ends or is transferred, the CCA will automatically switch your **agent status** to **Busy – Wrapping Up**. This **wrap-up mode** provides the time to complete any paperwork or additional tasks.

If **Call Classification** is mandatory, the **Classification** window will open when a call has ended, please see [step 5](#) below.

To take another call, change your **agent status** to **Available** as in [step 2](#).

**Note:** Your team may have a limited **wrap-up time**. When that time expires the CCA will automatically change your **agent status** back to **Available**.



## 5. CALL CLASSIFICATION

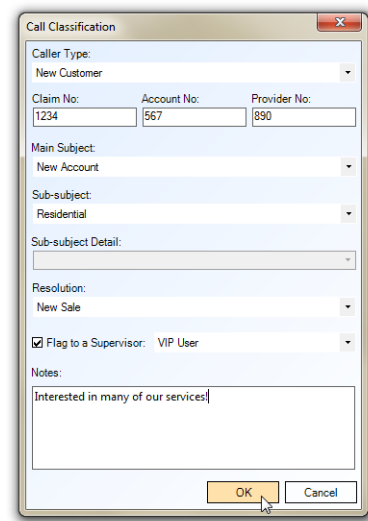
You may open the **Classification** window any time during a call by **clicking the Classify button** located on the middle bar.

Use the drop down menus to select the appropriate options for **Caller Type**, **Main Subject**, **Sub-subject**, **Sub-subject Detail** and **Resolution** fields.

**Claim No.**, **Account No.**, and **Provider No.** fields can be used for tracking customer account information.

Alert your supervisor of the call or event that you've just handled by placing a checkmark in the box labeled **Flag to a Supervisor** and select the **reason for flagging** from the drop down list on the right. Caller and disposition information, along with any other notes, will be emailed directly to your assigned supervisor.

Enter any additional information in the **notes** field and click **OK**.



## 6. TRANSFER A CALL

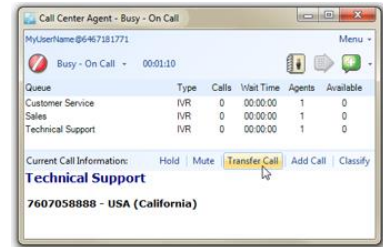
You may wish to transfer your currently active call to a different queue, to an outside line, or to a teammate.

Click **Transfer Call** located on the middle bar – the **transfer call** window will open.

To **transfer to a queue**, proceed to [step 6.1](#) below.

To **transfer to a phone number**, proceed to [step 6.2](#) below.

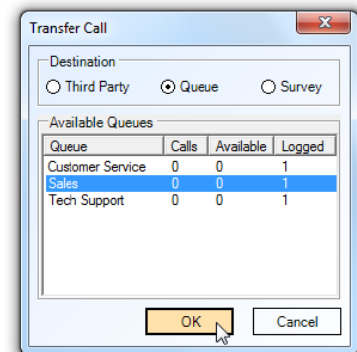
**Note:** To make an internal transfer, pull up a list of your teammates who are also signed in with the CCA by using the phone book. *Please see [step 8](#), [Phone Book](#).*



### 6.1 TRANSFER TO A QUEUE

Change the **Destination to Queue**, select an available queue and click **OK**.

Your connection with the caller will end and your CCA will enter **wrap-up mode**.



### 6.2 TRANSFER TO A PHONE NUMBER

Change the **Destination to Third Party** and enter the **phone number** in the field labeled **Destination Number** or choose a **recent number** from the drop down on the right.

Now you must choose between two different transfer types.

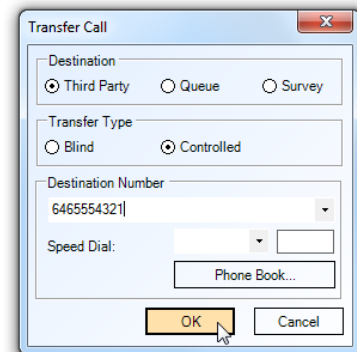
**Blind:** Call is immediately transferred.

**Controlled:** Allows you to speak with the third party first.

Select the desired **transfer type**, click **OK**.

A **confirmation** window will open, only click **Yes** once you've spoken with the third party. At any point you may click **No** to cancel the transfer and resume your current connections on hold.

**Note:** You can also transfer to a **third party** with the **Phone Book**. See [step 8](#).



## 7. DIALING OUT **\*\*UPDATED**

To place an outbound call, click **Dial Out** located on the top row – the **Dial Out** window will open.

Select the **ID** you wish to display from the **Caller ID** drop down menu.

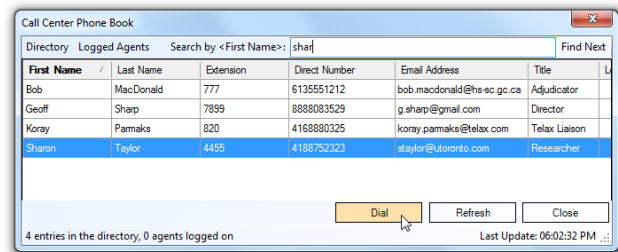
Now enter the **phone number** you wish to dial in the field labeled **Destination** or select a number from the **Recent Destinations** list below. Click **OK**. The system will first call you at the extension that you signed in with, only once you answer your phone will your destination be dialed.



## 8. PHONE BOOK

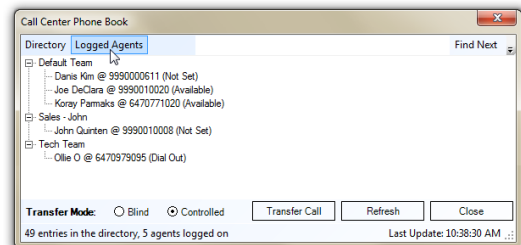
Click **Phone Book** located on the top bar and the **Phone Book** window will open. Use the buttons in the upper left corner to switch between its two listing modes:

**Directory:** populated by your team's administrator, each column can be sorted ascending and descending or used as a search field.



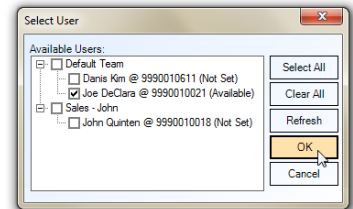
**Logged Agents:** a real-time listing of your teammates that are currently signed in with the CCA and their **agent status (on-call, on-break, available)**.

Select a **contact** or **teammate** from the appropriate list and then click **dial**. If you already have a **call in progress**, the **phone book** can be used to **transfer** rather than dial.



## 9. START A CHAT SESSION

Click **Chat** located on the right side of the top bar. When the **Select User** window opens, place a checkmark next to the **members** you wish to add to your chat session and click **OK**.

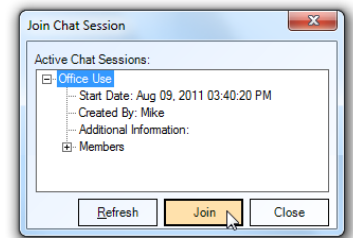


### 9.1 JOIN AN ACTIVE CHAT SESSION

To join an **active chat**, navigate the mouse to **Menu > Chat > Join Chat Session**.

In the **Join Chat Session** window, the name of the **active chat** sessions will be displayed. Click on the name and click **Join**.

More information regarding chat sessions and their members can be displayed by clicking the + expansion buttons.

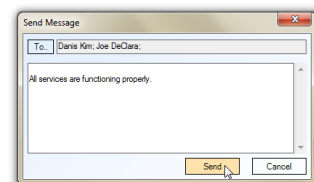
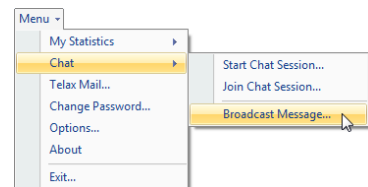


### 9.2 BROADCAST A MESSAGE

From the **main application** window, navigate the mouse to **Menu > Chat > Broadcast Message....**

The **Select User** window will open. Place a checkmark next to the **team name** or **member names** you wish to broadcast your message to and click **OK**.

Write your message and then click **Send**.





## 10. CONNECTION SETTINGS

If you are unable to sign in or connect with the CCA, click on **Connection Settings**.

When the **Connection Settings** window opens, verify that you are using the correct **Client ID** in the **Licensing Information** box.

Also check to see if the **HTTP Service Providers** section is blank, in this event click **Reset Service Providers** and **Connection Settings**. This will automatically detect and populate the correct **Proxy settings**.

After clicking **Reset...**, confirm that there is at least one proxy entry populated in the **HTTP Service Providers** section.

Now click **OK** and try to log on once more as you did in [step 1](#).

**Note:** A **proxy setting** entry can also be added manually by clicking **Add**.

If you are still unable to connect, please consult your supervisor / local system administrator.

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