

#4c

# Switchview & Automatic Call Distribution (ACD)

## Training Manual for Agents 2006

Updated 9/7/2006



## New Model



## New Terms

**Log-on** - Agents must log on to an ACD phone by entering their personal ID number.

**ACD phone** - A phone set specially equipped to receive ACD calls.

**Ready** - An agent is logged on to an ACD set, and has deactivated the NOT READY key.

**Not Ready** - The phone key used to STOP incoming calls to that ACD phone set after an agent has logged in.

**Agent** - A person logged on to an ACD phone set.

**Night Service/Day Service/Emergency Mode** - The program modes used to deliver the correct recorded message to the caller; also to activate and deactivate incoming calls.

**Queue** - Calls waiting to be handled by agents.



# ACD phone set - Currentmodel

PSS-1 Training #4-c Switchview

## ACD phone set - Current model

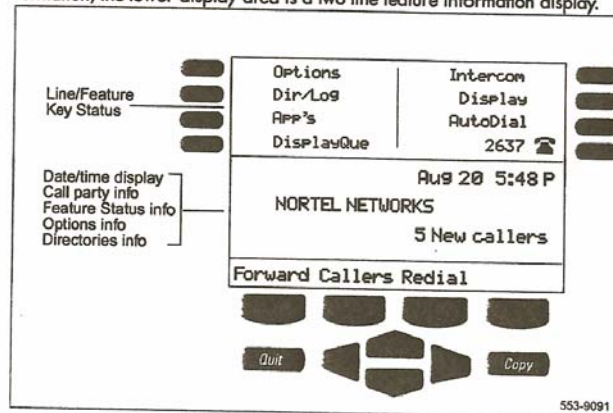


### Your telephone's display

This section summarizes the display features of the M3905. An example of an idle display is shown in the following figure.

#### M3905 Call Center telephone display

The upper portion of the display on the M3905 gives line and feature status information, the lower display area is a two line feature information display.



# Using ACD

## Logging on

Note: A 4-digit personal ID code is required in order to log on to the ACD system. Always log on using this ID code - do NOT use anyone else's ID code; as with other log-on passwords at UWMC, do NOT share your ID code with others.

1. Press **IN-CALLS** (lower right key)
2. Enter personal ID code. **NOT READY** will display on the LCD display  
After this two-step process, you are logged on to the ACD system; you are still not available to accept incoming calls.
3. Press **IN-CALLS** to open your phone line to incoming ACD calls.

## Answering incoming calls

A reminder to phone staff: we always answer the phone with [clinic name], this is {your name}. If you know the caller has been in the queue, the caller has already heard the recorded message identifying the clinic. You may then simply say "this is {your name}, May I help you?"

1. Answer incoming calls - your phone set will ring and the LCD display next to the **IN-CALLS** key will flash.
  - Steady light = at least one caller is waiting
  - Slow flash = more than one call is being held.
  - Fast Flash + queue is full - new callers will receive a busy signal.

# Monitoring the queue

**DISPLAY QUEUE** - press this key to display:

WAITING	MAND	LWAIT	TOFQ
3	2	120	0

WAITING = number of callers waiting in the queue

MAND = number of agents logged in to the system. - this doesn't guarantee they are actively taking calls.

LWAIT = the time in seconds the oldest caller in the queue has been waiting.

TOFQ = Time Overflow Queuing - not in general use.

## LOG-ON and **NOT READY** Policy

Staff assigned to telephone reception duties will log onto the ACD system at the start of their shift and will remain logged-on at when actively taking calls. Staff will log out during assigned rest breaks and lunch breaks. Before logging out during business hours, staff will check the display queue so that at least one other agent is still logged on. **Otherwise the callers will hear the Emergency Daytime message - and their calls will not get through.** Staff will not share logins.

The **NOT READY** key will be used sparingly, i.e., to complete post-call processing.

The last staff to log-out at the end of the day will check the display queue to ensure that ALL ACD sets are logged out. The first staff in the morning will do the same before logging in. **Phones that are logged in and not manned WILL ring.**

# Terminating calls

To immediately accept another call, press **IN-CALLS** or **GOODBYE**. If there are calls in the queue, the next caller will arrive instantly. OR -

# Using Not Ready

For post-call processing time, press **NOT READY**. As soon as you are ready to receive the next call, press **IN-CALLS**.

**CAUTION:** Do NOT press the **NOT READY** key if a new call has started to ring on your phone set - this would send the caller back to the queue - AFTER the caller heard your phone ring.

A few NOT READY rules

Use NOT READY for a few moments to finish a message, etc.

LOG OUT if you are not actively answering calls.

# Logging out

1. Press **NOT READY**. Be sure you do NOT have an incoming ACD call ringing on your phone set when you press NOT READY,
2. Press **DISPLAY QUEUE**.
3. Check "MAND" status:
  - During business hours: If status is "1", do NOT log out; the last person to log out during business hours sends the system into night service.
  - At end of business day: press **LOG OFF** - display screen will show "Make Set Busy Activated. Press **LOG OFF** a second time - display screen will show "Logged Out".

# Night Service

NOTE: Failure to follow proper procedures when activating Night Service will cause callers still in the queue to be sent immediately into Night Service.

The following instructions apply to the supervisor set.

In my clinic, the supervisor set is located \_\_\_\_\_

At 5 p.m. each business day:

After pressing **NOT READY** on your phone set, go to the Supervisor Set.

1. Press **NIGHT**. The Display Screen will show "Night Service, Select Mode".
2. Press **8** (or **T**) on the numeric keypad. The Display Screen will show "Transition Mode Selected. Night Service, Select Mode". This will stop any new callers from entering the queue. (New callers will hear the after hours message.)  
"T" = "Transition" mode
3. Return to your phone set. Press **DISPLAY QUEUE**. If WAITING = 1 or more calls, there are calls being held in the queue. You **MUST** answer these calls before logging out. If WAITING = 0, no calls are waiting, and you may log out. (All agents should log out at this time).
4. 4. Once callers in the queue have been processed, return to the Supervisor Set and select **6** (or **N for Night**) on the numeric keypad.

# "Morning"

aka: Night Service Deactivation

NOTE: This procedure must be followed at start of each business day.

1. Go to an agent phone set. Press **DISPLAY QUEUE**.
  - If MAND = 1 or more, an agent set was not logged off correctly. The starting staff member **MUST** log off all phones sets before continuing.
  - When MAND = 0, log on to your phone set, leaving your phone set in the **NOT READY** state.
2. On Supervisor Set, press **NIGHT**. The Display Screen will show "NIGHT SERVICE, SELECT MODE.
3. Press **3** (or **D**) on the numeric keypad. The Display Screen will show "DAY MODE SELECTED. NIGHT SERVICE, SELECT MODE."  
*"D" = "Day" mode*
4. Return to your phone, and begin answering incoming calls.  
*Remember to answer in a warm and caring voice - each caller gives you a fresh start to pave the way to greater satisfaction...*

*Remember:*

**YOUR voice is  
THEIR first impression!**