



## Contact Center Aisle Meeting Agenda

Aisle Meeting Agenda for the week of: 7/16/2012



### Reminders/Updates

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#### Procedure: Utility Account Transaction Processing CS 106.1

#### Talking Points.

The purpose of the procedure is to clarify how SPU expects employees to handle transactions for their own accounts, accounts of people you know, or co-workers and City employees who may have access to CCSS.

- A lot of time and effort, consideration and thought have gone into this procedure. SPU did not rush into development of this procedure, and it has gone through scrutiny of City attorneys and the City's Joint Labor/Management committees.
- This is a procedure that is in effect for all of the Customer Service Branch-not just the Contact Center.

#### What this means to you:

- It means that sometimes completing an account request will take longer than it used to..
- It means that we all have to put forth a bit more effort to ensure that we are following the policy-but this effort means that no one will have cause to question the activities of employees who work in CCSS
- Yes- sometimes it will seem like a real hassle, but it is important to follow the procedure, because it is for your protection.

#### Section A review: Key points:

- Request changes on your own account **via email** to a supervisor.
- Supervisors need to make requests about their own account to Debra or Susan. They will seek assistance from someone who is more familiar with CCSS to do the work, but they must authorize it.
- Notes are required on all accounts for employee transactions. Who authorized the work is a mandatory note to be made by the person who authorized the work.

#### Section B review: Key Points:

- If in doubt-check with a supervisor
- You can ask the requestor if they have access to CCSS-if you are not sure.
- It is okay to tell an employee "I'm sorry; I don't think I am allowed to do that, let me speak to a supervisor.
- If a supervisor authorizes you to do the work- it is okay but THE SUPERVISOR needs to note the account



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### Section C review-

- When in doubt refer to the policy and consult a supervisor
- Don't transfer the family member to a different UAR's direct line. It should be a "random" transfer. You can transfer the call into a queue or have them call back.
- If the second employee who gets contacted knows the family member also, they cannot perform the transaction either. That is why it is good to have them call back.
- **Walk in Center staff** are not allowed make changes, payment arrangements, or accept payments from any SCL, SPU, or other employees that have access to CCSS.

It will help if in advance you begin to inform family, friends, co-works, and others you know about this policy so that they can use as many self service options as possible.

**Emails-In IC**-If you get a web request in IC and it is from a family member or someone you know- transfer the email to the EM work in progress queue and advise your supervisor via email so that they can have someone else complete the transaction.

### Follow-up Action Items/Questions

### Delivery Date

- Why can we make payments on the 42<sup>nd</sup> floor and not 27<sup>th</sup>? What is the difference?

*Answer: Policy 106.1 is an SPU procedure. It doesn't apply to the cashiers on the 42<sup>nd</sup> floor who work for Dept of Finance.*

- Can employees take payments from ex-coworkers?

*Answer: No. Explain the policy to the ex-coworker, but be sure to give them other options for making their payment.*

- Can spouses of employees come in or call and make payments?

*Answer: We are seeking clarification on this issue to determine if the family member (spouse) of the co-worker falls under the same guidelines as the coworker. For now, it is in your best interest to follow 4A and email a supervisor, but we will get clarification from the Risk and Quality Assurance Director as the procedure instructs us to do, and we will get back to you*



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- Will we ever “Flag” employee accounts?

*Answer: There are no plans, currently, to flag employee accounts.*

- Can we go to other Walk in Centers and make payments?

*Answer: Yes. Other walk-in Centers are operated by the Dept. of Neighborhoods, so policy 106.1 doesn't apply.*