**Escalated Calls to a Supervisor (Updated 12/7/21)**

**Step One –** While on a call, select Consult.



**Step Two –** Enter the name of the person you are trying to reach. Click the phone under their name.



This places the original call on hold while you complete the consultation.



**Step Three –** Consult with the supervisor regarding the case/escalated individual. If the call needs to be transferred, proceed to Step Four.

**Step Four –** Select Instant Conference, the active consultation will display. Click the Phone Icon to combine the calls.



Note: Please be sure the supervisor is in a **Not Ready - Supervising** status prior to consultation. If the supervisor is in any other status or unable to be reached, please inform the customer an email will be sent and a return call will be made. Please follow up with a detailed email to the supervisor including the case number, any updated contact information, and the reason for the call.