**Escalated Call Process**

**What is an Escalated Call?**

Call escalation is the process of transferring a customer’s call to a **higher-level support**like supervisors or managerswhen a call center agent cannot resolve the customer’s issue due to the customer being irate, angry, upset, abusive, and demanding a supervisor. Worker has tried to de-escalate the situation by staying calm, practicing active listening, showing empathy, focusing on the customer’s needs, validating emotions, and effectively addressing their issues.

**Calls that should be escalated to County of Residence:**

1. Someone who is angry, upset, yelling, abusive, and demands a supervisor.  The worker has attempted to, but has not been successful in, de-escalating and cannot sufficiently address the issues because of the client behavior.

**Calls that Should be transferred to Agent’s direct supervisor:**

1. When the agent has questions about policy or is unsure of the answer to give to the client.
2. When the agent has questions about what action to take on a case they should review the case with their supervisor and follow up with the customer if needed.
3. When there is a complaint about a worker.
4. When the customer is disagreeing with case action, benefit amount ,etc. but not irate.
5. When the customer is questioning the worker’s answers, but not in a disrespectful manner.
6. When the agent is on a difficult call and needs assistance to handle the call.
7. When the customer feels mistakes were made on a case and wants a supervisor to review it.  The agent should review it with their supervisor and make any updates needed to process the case and follow up with the customer.  If the agent and supervisor find no errors, a fair hearing should be offered.
8. When the customer wishes to speak to a supervisor because they feel the agent’s conduct is unprofessional.
9. When the agent offers the client a supervisor.

Examples:

* A customer calls because they are upset with the way self-employment income is being budgeted on their case and feels it is not being budgeted correctly. The worker should review the case for accuracy. If assistance is needed, they should contact their direct supervisor. The worker will make any updates needed on the case. If the case is correct, the worker will explain this to the customer and offer a fair hearing if necessary.
* A customer calls because they are upset because a household member is included in their benefits and they are adamant the person doesn’t reside there. The agent offers a fair hearing but the customer continues to be upset, is yelling and swearing at the agent. The agent attempts to de-escalate the customer but is unsuccessful. This call should be sent to the county of residence for assistance.

**Escalated Call Procedure**

1. Go to a lead or your local office supervisor if you have questions related to policy or for clarifications.  Admins are available to assist with this type of issues only if your supervisor or lead is not present.
2. Attempt to deescalate the call, before sending it to a supervisor.
	1. Tell the client you’ll have to check policy and place them on hold to review the case/handbooks.  **Do this even if you know the answer so they know we’re attempting to help.**
	2. If the escalation becomes abusive or offensive, give a warning to the customer that the behavior will not be tolerated and if it continues you will disconnect the call.
	3. If they continue, end the call in a polite manner. You are under no obligation to tolerate abusive or inappropriate behavior from clients.
	4. If the call center agent has tried to resolve or de-escalate the customers problem, but the customer is not satisfied with the response, or the customer is frustrated by the interaction, forward to the Supervisor.
	5. If client insists on talking to a supervisor, explain to the customer that they will receive a call back within two business days, after the case is reviewed.
	6. All Agents will e-mail escalated call back requests to the county of residence of the case. Use the below e-mails accordingly and follow the below process.

Email the case information, programs open, and team assigned with the subject stating Escalated Caller – Program Area.  Include a brief summary of the issue and the interaction ID in the body of the email.

Example: Escalated Caller – LTC, CC, Bilingual, FS, BCP, etc.

* 1. If there is an issue with the case and it requires corrective action from the agent, direction will be given, and the direct supervisor will be cc’d in on the email.

If there is an issue from a personnel standpoint (ex: rude to customer, inappropriate behavior, etc.), the call should be emailed to and discussed with the direct supervisor so they can follow up with their worker