Web Based Customer Service
Call Documentation System

Original Release Date: July 2008
Current Version: 1.000
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Document Revision History

Document revision history is summarized below.

<table>
<thead>
<tr>
<th>Document Version</th>
<th>Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.000</td>
<td>07/08/2008</td>
<td>Initial release of document</td>
</tr>
</tbody>
</table>
Introduction
This document describes the functionality of Allied’s web based customer service call documentation system. The customer service call documentation system is an integrated solution within the alliedbenefit.com web site. This system allows customer service agents to document customer service calls for later access and retrieval. The system also supports call routing and workflow, which allows other staff and departments to access customer service calls for resolution and closure. In addition to the online call documentation and search features, several web reports have been created, which can be used to analyze call statistics and manage open calls.
Definitions
Because there are many new concepts and ideas introduced in this document, the following section provides definitions of the most commonly used terms.

**Agent** – A customer service representative, usually one who takes calls from members or providers.

**Call** – A generic term used to describe a unique call instance or sequence of related calls by one or more callers who have an interest in a transaction or service managed by Allied.

**Call Owner** – The user who created the original customer service call. The call owner is a permanent property of a customer service call.

**Caller** – Any person calling in to Allied’s customer service department seeking information related to health care benefits administered by Allied or it’s affiliates. Every Call must include a caller name and caller type. The caller does not necessarily have to be one of the individuals directly associated with a health care transaction or a covered benefit.

**Closed Call** – A call that has been closed by a specific individual at Allied and presumed to be in a final and completed status from the perspective of Allied and the caller(s).

**Notes** – A generic term used to describe the process of documenting a call. The term notes is also used to describe the actual free form notes take by an agent in relation to the documentation of a call or an action taken on a call (e.g. routing to another agent or queue, closing a call, etc.)

**Open Call** – A call that is currently in open status and needs to be resolved and closed by Allied.

**Queue** – Within the context of the online customer service documentation system a group or destination specifically used for routing open calls. Users are assigned to specific queues and are responsible for managing the queues and either closing calls themselves or routing to specific individuals.

**Routing** – The act of routing an open call to another agent or queue. Call routing is the fundamental concept behind customer service web site workflow. Calls can be routed to another agent or a queue. When a call is routed to a queue, the assumption is that the call will be reviewed by the queue manager and then either resolved directly by the queue manager or routed to another queue or more commonly to another agent.

**User** – A user of the Allied web site and particularly the customer service system. A customer service agent or customer service support user is referred to generally as a user.
Customer Service Notes

For convenience and ease of access, the customer service call notes screen can be opened from any web page. The user simply clicks on the Notes hyperlink just above the menu items on the left side of the web page. Users must have the following credentials to access the customer service system.

- Must be an Administrator type user
- Must have the Customer Service Call Notes program option
- Must be a member of either the Allied Customer Service or Allied Customer Service Support groups

Click here to open the notes page
When the user clicks on the Notes hyperlink, the Call Notes page is opened. By default the Call Notes page starts in search mode. The following sections describe in detail the search capabilities and how to create new calls, edit/route existing calls, or add notes to existing calls.
Call Notes Search Screen

This section describes how to search for existing calls.

<table>
<thead>
<tr>
<th>Customer Service Call Notes</th>
<th>New Call</th>
<th>Search for Calls</th>
<th>Close</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Search Customer Service Calls</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reference Number</td>
<td>Caller Name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Claim Number</td>
<td>or Select</td>
<td>Select...</td>
<td></td>
</tr>
<tr>
<td>Subscriber Name</td>
<td>SSN/UID</td>
<td>or Select</td>
<td>Select...</td>
</tr>
<tr>
<td>Member Name</td>
<td>or Select</td>
<td>Select...</td>
<td></td>
</tr>
<tr>
<td>Provider Name</td>
<td>Provider ID</td>
<td></td>
<td></td>
</tr>
<tr>
<td>or Select Provider</td>
<td>Select...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group</td>
<td>Select group...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Search by Call Status</td>
<td>All Calls</td>
<td>Search by User/Queue</td>
<td>AllCalls</td>
</tr>
<tr>
<td>Search by Call Start Date</td>
<td>End Date</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Each item on this search screen will now be described.

- **New Call** – If there are no previous calls then press this button to immediately start a new call. New calls will be described in the following sections.
- **Search for Calls** – Press this button from the new or edit call screens to immediately load the Search Customer Service Calls screen.
- **Close** – Close this screen.
- **Reference Number** – All customer service calls are assigned a unique reference number. Customer service call reference numbers start with the prefix “CC” and are sequential, for example CC1000, CC1001, etc. For expediency, the CC prefix can be omitted when searching using this field.
- **Caller Name** – Enter the caller’s name in this field. You can enter the complete first and last name, partial first and last names, or just the last name. When entering partial names be sure to select the Soft Search option.
- **Claim Number** – Enter the 10 character claim number to search for calls that include the entered claim number.
- **Select (Claim Number)** – If this screen is opened from the claim inquiry page, this list will be populated with the claim number.
- **Subscriber Name** – Enter the subscriber’s first and last name or partial first and last names. If entering partial names be sure to select the Soft Search option. Since subscriber name is not required for customer service calls, this option will only find calls with subscriber names that match the entered values.
- **SSN/UID** – Enter the subscriber’s SSN or UID. Since subscriber SSN/UID is not required for customer service calls, this option will only find calls with subscriber SSNs or UIDs that match the entered value.
• **Select (Subscriber)** – If this screen is opened from either the claim or eligibility inquiry page, this list will be populated with the subscriber information.

• **Member Name** – Enter the member’s first and last name or partial first and last names. If entering partial names be sure to select the Soft Search option. Since member name is not required for customer service calls, this option will only find calls with member names that match the entered values.

• **Select (Member)** – If this screen is opened from either the claim or eligibility inquiry page, this list will be populated with subscriber family member information.

• **Provider Name** – Enter the provider’s first, last or full name or partial first, last or full name. If entering partial names be sure to select the Soft Search option. Since provider name is not required for customer service calls, this option will only find calls with provider names that match the entered values.

• **Provider ID** – Enter the provider’s TIN or NPI. Since provider TIN/NPI is not required for customer service calls, this option will only find calls with provider TINs or NPIs that match the entered value.

• **Select (Provider)** – If this screen is opened from the claim inquiry page, this list will be populated with the service and payment provider information.

• **Group Number** – Select a group to limit the calls to a specific group.

• **Search by Call Status** – Search for specific call types, i.e. All Calls, Open Calls, and Closed Calls.

• **Search by User/Queue** – Search for calls opened by or routed to specific users or queues. This list is populated with all customer service users, customer service support users and queues. This list also include the option to search for all calls or my calls (the currently logged in web user).

• **Search by Call Start Date** – Select the start date for the call search. All calls opened on or after the start date will be included in the results. Leave blank to select all calls.

• **Search by Call End Date** – Select the end date for the call search. All calls opened on or before the end date will be included in the results. Leave blank to select all calls.

• **Hard Search** – Use this option when searching for explicit information, e.g. call reference number, claim number, selected subscriber, selected member or selected provider.

• **Soft Search** – Use this option when searching for calls with partial or questionable information, e.g. partial names, etc. This option uses wildcard searching. These searches can be slower than hard searches, but they there is a higher likelihood of finding the desired calls when only partial information is known.
New Customer Service Calls
A new customer service is entered by clicking on the New Call button.

The Customer Service Call Notes screen will then be refreshed so that call information can be entered. The call data entry screen is shown on the next page.
Each item on the call notes screen will now be described.

**Caller Information**

- **Caller Last Name** – The current caller’s last name. This is a required field.
- **Caller First Name** – The current caller’s first name. This is a required field.
- **Caller Type** – The caller type. This is a required field.
- **Call Back Phone Number** – The caller’s call back number. This field is required if a Call Back is required.
- **Contact E-mail Address** – The caller/contact’s e-mail address. This field is not required.

**Call Information**

- **Ref#** – An auto-generated call reference number. Make sure to give this number to the caller for future reference.
- **Date** – The date and time of the original call.
- **Agent** – The name of the agent who took the original call.
- **Group** – Group selection list. The current group will be selected if this screen was opened from the eligibility or claim inquiry page. This field is not required.
- **Claim Number** – The related claim number. This field is not required.
- **Select (Claim Number)** – If this screen is opened from the claim inquiry page, this list will be populated with the claim number. Select the claim number from this list if it applies to the call to eliminate unnecessary data entry and potential data entry errors.
- **Subscriber Last Name** – The subscriber’s last name. This field is not required.
- **Subscriber First Name** – The subscriber’s first name. This field is not required.
- **SSN/UID** – The subscriber’s SSN or UID. This field is not required.
- **Select (Subscriber)** – If this screen is opened from either the claim or eligibility inquiry page, this list will be populated with the subscriber information. Select the subscriber from this list if it applies to the call to eliminate unnecessary data entry and potential data entry errors. This field is not required.
- **Member Last Name** – The member’s last name. This field is not required.
- **Member First Name** – The member’s last name. This field is not required.
- **Select (Member)** – If this screen is opened from either the claim or eligibility inquiry page, this list will be populated with family member information. Select the family member from this list if it applies to the call to eliminate unnecessary data entry and potential data entry errors. This field is not required.
- **Provider Last Name** – The provider’s last name. This field is not required.
- **Provider First Name** – The provider’s first name. This field is not required.
- **Provider ID** – The provider’s TIN or NPI. This field is not required.
- **Select (Provider)** – If this screen is opened from the claim inquiry page, this list will be populated with the service and payment providers. This field is not required.
- **Call Status** – Select the call status. This item can be updated during initial data entry. This item is required.
• **Call Reason** – Select the call reason. This item can be updated during initial data entry. This item is required.

• **Call Type** – Select the call type. This item can be updated during initial data entry. Call types include caller initiated calls, Allied initiated calls and call notes that are not related to an actual phone call. This item is required.

• **Reason Open** – Select the reason why the call is open. This item can be updated during initial data entry. This item is required if the call is in open status.

• **Call Back Required** – Select the call back required option. This item can be updated during initial data entry. This item is required.

• **Route To** – Select the route to agent or queue. This item can be updated during initial data entry. This item is not required.

• **Route To Reason** – Select the route to reason. This item can be updated during initial data entry. This item is required if the call is routed.

• **New Call Notes** – Enter the call notes. Call notes are optional but should always be entered anytime a call is opened, routed or closed. Call notes are required when a call is closed. Call notes cannot exceed 1000 characters.

• **Save** – Saves the current call.
Call Notes Data Entry Errors
Call notes data entry errors are detected when a call is saved. The system will detect missing or inconsistent fields and warn the user on a data entry error page. The user can then navigate back to the data entry page to resolve any errors.

![Transaction Errors](https://staging.alliedbenefit.com/admin/callnotes1.asp)

- Please enter the caller’s last name
- Please enter the caller’s first name
- Please select a caller type
- Please select a call status
- Please select a call reason
- Please select a call type
- Please select a call back option

Back

Done
Once the required fields and items have been properly entered, the call note will be successfully saved. Here is an example simple call note. **The call reference number should be given to the caller immediately.**
Once the note is saved, the following screen is displayed.
Retrieving Existing Calls
The customer service agent should always ask the caller if they are calling in regards to an existing call or if it’s a new call. For existing calls, the agent should ask for the reference number. If the caller does not have a reference number, the agent should search by subscriber and/or member. So for the previous note, if the caller provided the call reference number of CC1133, the agent would perform a hard search using the call reference number.

![Image of search form]

The call can then be opened by simply clicking on the Reference # hyperlink. The call is displayed on the following page.
Customer Service Call Notes

Caller Information
- Caller Last Name: CONNORS
- First Name: WALTER
- Caller Type: Subscriber
- Call Back Phone Number: 3125068080
- Contact Email Address: jdoe@alliedbenefit.com

Call Information
- Ref#: CC1133
- Date: 7/10/2008 11:22:55 AM
- Agent: ADMIN ADMIN
- Group: QL, INC (DEMO ACCOUNT): 9584
- Claim Number: 
- Subscriber Last Name: 
- First Name: 
- SSN/UID: 
- Member Last Name: 
- First Name: 
- Provider Last Name: 
- First Name: 
- ID: 
- Call Status: Open
- Call Reason: Benefits Verification
- Call Type: Select...
- Reason Open: Eligibility
- Call Back Required: No
- Route To: Select...
- Route to Reason: Select a routing reason...
- New Call Notes (1000 characters max): 

Call History

<table>
<thead>
<tr>
<th>Caller Name/Caller Type</th>
<th>Date/Time</th>
<th>CS Agent</th>
<th>Routed to</th>
</tr>
</thead>
<tbody>
<tr>
<td>WALTER CONNORS (Subscriber)</td>
<td>7/10/2006 11:22:55 AM</td>
<td>ADMIN ADMIN</td>
<td></td>
</tr>
</tbody>
</table>

Call Notes: The subscriber needed to know his yearly medical and dental deductible amounts.
Editing Existing Calls

Existing customer service calls can be opened for review or editing. There are specific rules for editing existing calls that are enforced by the system. These rules are summarized below in the following table.

<table>
<thead>
<tr>
<th>Action</th>
<th>Call Owner</th>
<th>Routed Agent/Queue</th>
<th>Other Agents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search all calls</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Close open calls</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Reopen closed calls</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Add new call notes to open calls</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Route open calls to other agents/queues</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Update other call properties (e.g. call reason, call routing, callback options, etc.)</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

Please note the following when editing existing calls.

1. All fields and selection lists are populated with the previously entered values.
2. The original call date and time and agent are displayed under the call information.
3. The Call Type selection list is NOT initialized with the previous Call Type selection. This item must be selected each time a call is edited.
4. The Call Notes text entry area is clear and ready to accept new notes.
5. Prior call history is displayed on the bottom of the screen in descending chronological order. The call history includes the caller name (it’s possible that different callers are calling back for the same call, especially with provider offices), call date and time, the customer service agent and the routing information.
Managing Customer Service Calls
The following section describes the typical ways in which customer service agents, customer service support personnel and queue managers should use the system to manage customer service calls. The following example illustrates the basic approach to managing customer service calls. The example is based on a provider requesting a claim review for possible incorrect provider discount.

Here is the scenario:

Step 1. Customer service agent #3 creates a new call for provider John Bates, MD inquiring about a claim for member MaryAnn Connors. The provider is requesting a call back from a customer service supervisor. Agent #3 routes the call to the Repricing queue.

Step 2. User #1, who manages the Repricing queue logs on to the web site and notices a new customer service call in their queue.

Step 3. User #1 uses the customer service search screen to view all open Repricing calls.

Step 4. User #1 then opens the call and routes to User #2 (repricing clerk) for review.

Step 5. User #2 logs on to the web site and notices that a new customer service call is open.

Step 6. User #2 performs the necessary research, resolves the claim issue and routes the call to Agent #1 who is a customer service supervisor.

Step 7. Agent #1 (customer service supervisor) calls the provider back and closes the call.

Step 8. Agent #2 accesses the closed call at a later date.

The entire process is summarized on the following pages.
Step 1a. Locate the claim from the claim history view

Step 1b. Open the claim and then click the Notes link
Step 1c. Create a new call

<table>
<thead>
<tr>
<th>Customer Service Call Notes</th>
<th>New Call</th>
<th>Search for Calls</th>
<th>Close</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Customer Service Calls</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reference Number</td>
<td>Caller Name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Claim Number</td>
<td>or Select</td>
<td>Select...</td>
<td></td>
</tr>
<tr>
<td>Subscriber Name</td>
<td>SSN/UD</td>
<td>or Select</td>
<td>Select...</td>
</tr>
<tr>
<td>Member Name</td>
<td>or Select</td>
<td>Select...</td>
<td></td>
</tr>
<tr>
<td>Provider Name</td>
<td>Provider ID</td>
<td></td>
<td></td>
</tr>
<tr>
<td>or Select Provider</td>
<td>Select...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group</td>
<td>Select group...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Search by Call Status</td>
<td>All Calls</td>
<td>Search by User/Queue</td>
<td>All Calls</td>
</tr>
<tr>
<td>Search by Call Start Date</td>
<td>End Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hard Search</td>
<td>Soft Search (can take longer)</td>
<td>Clear Fields</td>
<td></td>
</tr>
</tbody>
</table>

Click here to open a new call.
Step 1d. Enter the call information

The IQI group was already selected.

Select the claim from the claim list.

Select the subscriber from the subscriber list.

Select the member from the member list.

Select the provider from the provider list.

New Call Notes (1000 characters max)

Please review this claim and confirm it was repriced correctly under the IQI contract.
The call has been saved successfully.

<table>
<thead>
<tr>
<th>Customer Service Call Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Customer service call notes have been successfully processed!</strong></td>
</tr>
<tr>
<td>Please make sure to give the caller the call reference number: <strong>CC1143</strong></td>
</tr>
</tbody>
</table>

[Return to CS Notes Screen] [Close]
Step 2. User #1 logs on to alliedbenefit.com

Notice that the Notes link shows that one (1) open call is in this user’s queue.
Step 3. The user searches for open calls in the Repricing queue.

<table>
<thead>
<tr>
<th>Customer Service Call Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Customer Service Calls</td>
</tr>
<tr>
<td>Reference Number</td>
</tr>
<tr>
<td>Claim Number</td>
</tr>
<tr>
<td>Subscriber Name</td>
</tr>
<tr>
<td>Member Name</td>
</tr>
<tr>
<td>Provider Name</td>
</tr>
<tr>
<td>Group</td>
</tr>
<tr>
<td>Search by Call Status</td>
</tr>
<tr>
<td>Search by Call Start Date</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

Search Results

<table>
<thead>
<tr>
<th>Caller Name</th>
<th>Subscriber/Member</th>
<th>Caller Type</th>
<th>Subscriber UID</th>
<th>Call Reason</th>
<th>Call Date/Time</th>
<th>Reference #</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUSIE SMITH</td>
<td>Provider</td>
<td>Repricing/Network</td>
<td>Open</td>
<td></td>
<td>7/11/2008 4:17:15 PM</td>
<td>CC1143</td>
</tr>
<tr>
<td>WALTER CONNORS/MARYANN</td>
<td>999900027</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Calls routed to the Repricing queue

Open calls only

This is the desired call
Step 4. User #1 routes the call to User #2 who is a repricing clerk.

- **Caller Information**
  - **Caller Last Name**: SMITH
  - **First**: SUSIE
  - **Call Back Phone Number**: 5129068080
  - **Contact E-mail Address**: 

- **Call Information**
  - **Ref#**: CC1143
  - **Date/Time**: 7/11/2008 4:17:15 PM
  - **Agent**: CSAGENT3
  - **Group**: IQI, INC (DEMO ACCOUNT) - 3584
  - **Claim Number**: 0006157401
  - **Subscriber Last Name**: CONNORS
  - **First**: WALTER
  - **SSN/UID**: 988800027
  - **Member Last Name**: CONNORS
  - **First**: MARYANN
  - **Provider Last Name**: BATES
  - **First**: JOHN
  - **ID**: 933995782
  - **Call Status**: Open
  - **Reason Open**: Repricing
  - **Call Back Required**: Yes - CS Supervisor
  - **Route To**: USER2
  - **Route to Reason**: Repricing
  - **New Call Notes (1000 characters max)**: Please verify that this claim has been repriced correctly.

- **Call History**
  - **Caller Name/Caller Type**: SUSIE SMITH (Provider)
  - **Date/Time**: 7/11/2006 4:17:15 PM
  - **CS Agent**: CSAGENT3
  - **Routed to**: Repricing
  - **Call Notes**: Please review this claim and confirm it was repriced correctly under the IQI contract.

- **Internal processing, no related call**

- **Enters additional call notes**

- **Original call information**
The call was successfully updated.

<table>
<thead>
<tr>
<th>Customer Service Call Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer service call notes have been successfully processed!</td>
</tr>
<tr>
<td>Please make sure to give the caller the call reference number: <strong>CC1143</strong></td>
</tr>
</tbody>
</table>

[Return to CS Notes Screen]  [Close]
Step 5. User #2 logs on to alliedbenefit.com

Notice that the Notes link shows that one (1) open call is in this user’s queue.
Step 6. User #2 researches the claim request and routes the call back to the customer service supervisor (Agent #1).
The repricing clerk confirms the claim was processed correctly.
Step 7. The customer service supervisor calls the provider back and closes the call.

The customer service supervisor has several open calls.
The customer service supervisor’s open call list is shown below.

![Customer Service Call Notes](image)

This is the call of interest
The final call notes.

The call is being closed.

Allied initiated the call and called the provider back.

I called the provider's office and explained to the office manager, Susie Smith that the claim was repriced correctly. She was satisfied with the explanation and the call was closed.

Call History

<table>
<thead>
<tr>
<th>Caller Name/Caller Type</th>
<th>Date/Time</th>
<th>CS Agent</th>
<th>Routed to</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A - No call</td>
<td>7/11/2008 4:44:22 PM</td>
<td>USER2</td>
<td>CSAGENT1</td>
</tr>
<tr>
<td>Call Notes:</td>
<td>This claim was processed correctly.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Caller Name/Caller Type</th>
<th>Date/Time</th>
<th>CS Agent</th>
<th>Routed to</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A - No call</td>
<td>7/11/2008 4:34:15 PM</td>
<td>USER1</td>
<td>USER2</td>
</tr>
<tr>
<td>Call Notes:</td>
<td>Please verify that this claim has been repriced correctly.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Caller Name/Caller Type</th>
<th>Date/Time</th>
<th>CS Agent</th>
<th>Routed to</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUSIE SMITH (Provider)</td>
<td>7/11/2008 4:17:15 PM</td>
<td>CSAGENT3</td>
<td>Repricing</td>
</tr>
<tr>
<td>Call Notes:</td>
<td>Please review this claim and confirm it was repriced correctly under the IOL contract.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Step 8. Future access to the same call by another customer service agent (Agent #2).

The call is correctly shown as closed.
Notice that since the call is closed, and Agent #2 is not the original call owner Agent #2 can only add notes.