

Transfer/Hold Policy

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Transfer/Hold Policy

Procedures for placing a caller on hold, being placed on hold by caller or transferring a call.

- **Transferring Calls:**

- Ask the caller's permission to transfer them and give reason for transfer.
 - Ex: May I place you on a brief hold so that I can attempt to transfer you to ____ for further assistance?
- Ask the caller if they are ok with being transferred to voicemail if we cannot reach the intended party.
 - Ex: Thank you! If they are not available, would you like for me to transfer you to voicemail so that you may leave a message for a return call?
- If the intended party answers, be sure to provide all necessary information before completing the transfer.

- **Hold Procedure – Placing a caller on hold**

- Ask the caller's permission to place them on hold and give a reason why we are placing on hold.
 - Ex: Can I place you on hold for a few moments so that I can get clarification from my supervisor?
- Check back with the caller in less than 3 minutes. If additional time is needed, ask permission to place them on hold again.
- Thank the caller for holding and follow-up with explanation
 - Ex: Thank you so much for holding. I was able to verify that your insurance is accepted

- **Hold Procedure – Caller asks**

- Caller asks if they can place agent on hold
- Respond politely "Yes ma'am/sir. I can stay on hold for up to 5 minutes."
- Returns within 5 minutes – continue call

- Does not return within 5 minutes –
 - At 5-minute mark – state “Mrs./Mr. _____, I apologize but unfortunately I cannot remain on hold any longer. Please call us back when you are available.”
 - Leave detailed notes in Merge – “Patient placed me on hold for more than 5 minutes and I disconnected call.”

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