Call Screen

Presented by: Luis Gomez

COLLECTION MASTER

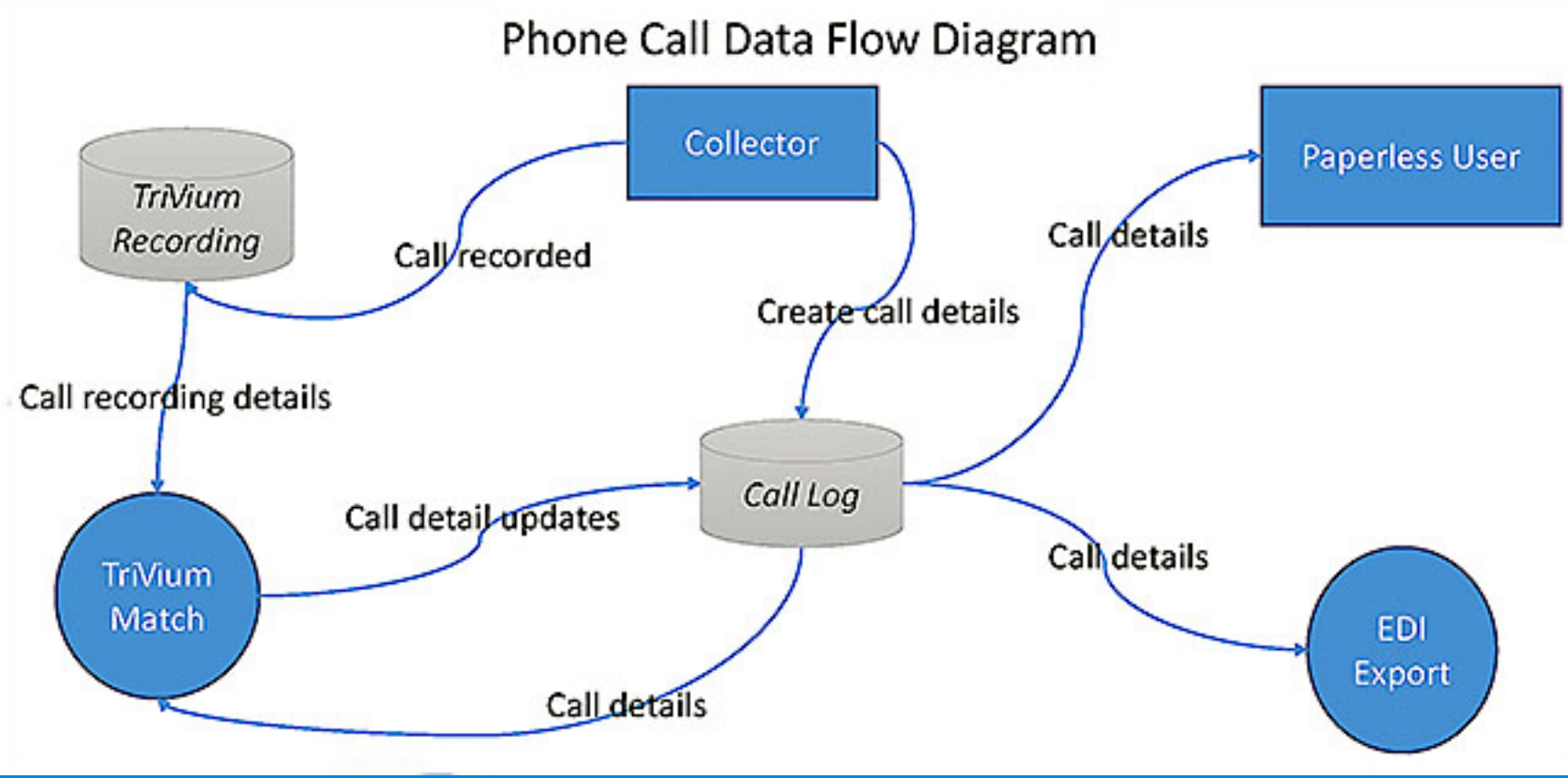
The Mastermind Series

Presented by VERTICAN TECHNOLOGIES

Collector’s Call Screen Overview

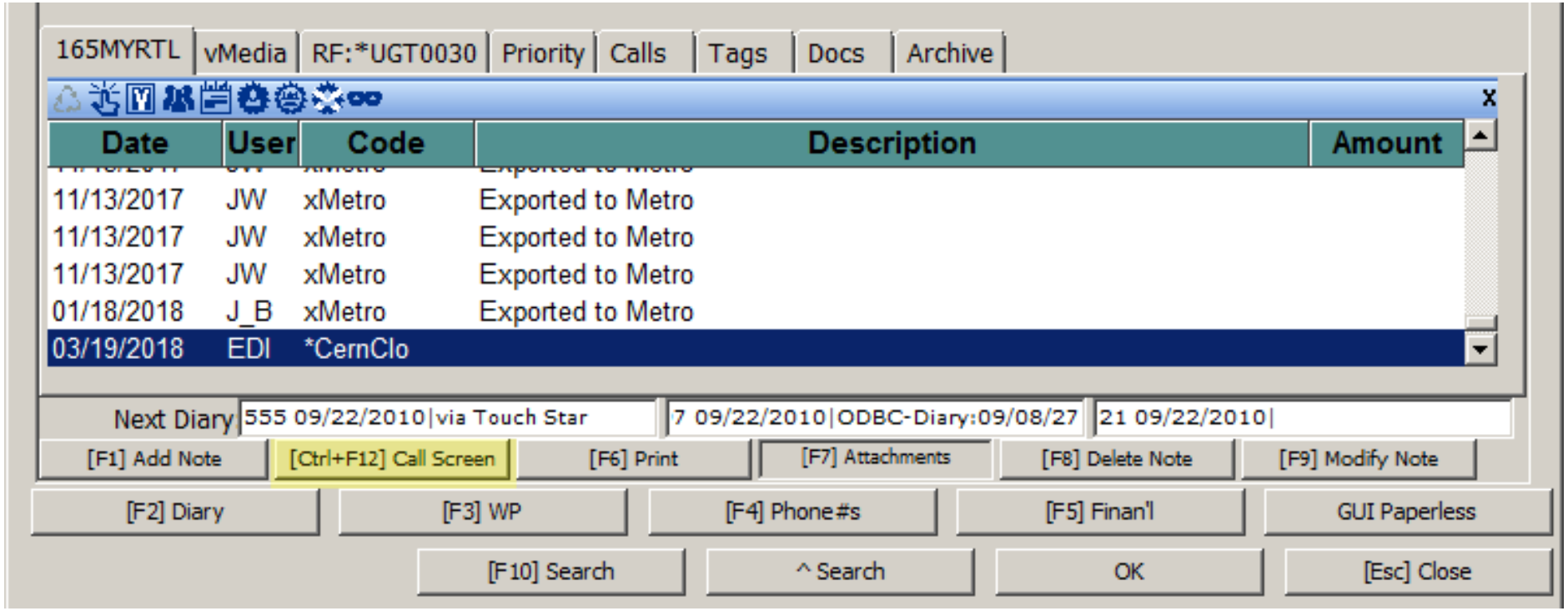
- Utilized for all contact attempts made to a consumer or any party related to a consumer such as:
  - Employer, Bank, Adversary Attorney, CCCS or other parties that specifically relate to the debtor
- All calls are logged into the Paperless Notes with a default system note that can be used to determine call results for EDI clients.
- Track the number of contact attempts in a given day.
- Provides the “Contact Results”
  - Right Party contact, Spouse, Left Message etc.
- Input a “Promise to Pay”
  - Logs “Call Results” in the “Consumer Correspondence” section of the screen

Trivium Integration



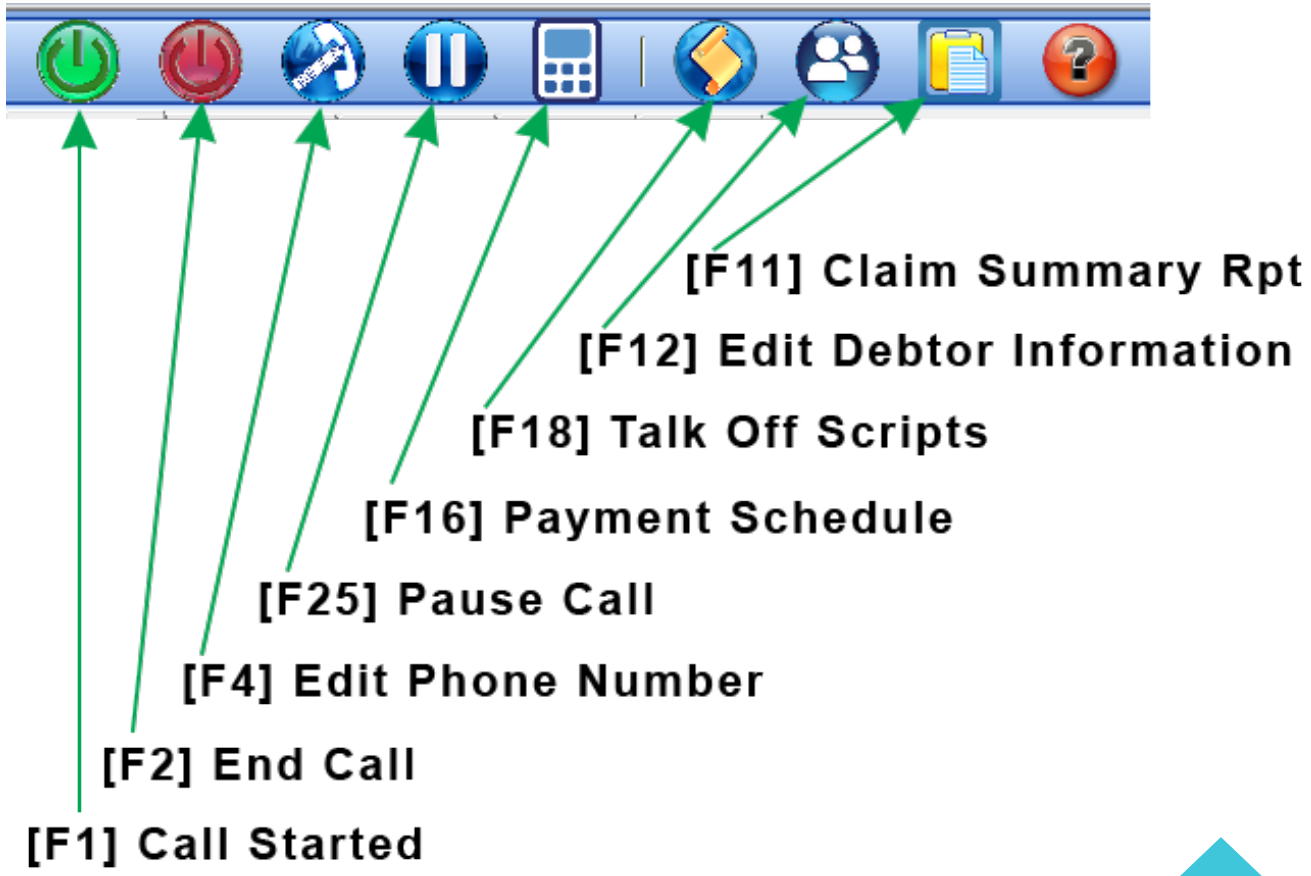
Start a Call

- Open the Paperless screen of a claim
  - **[Ctrl+F12 Start Call]** to access the Collector's Call Screen.



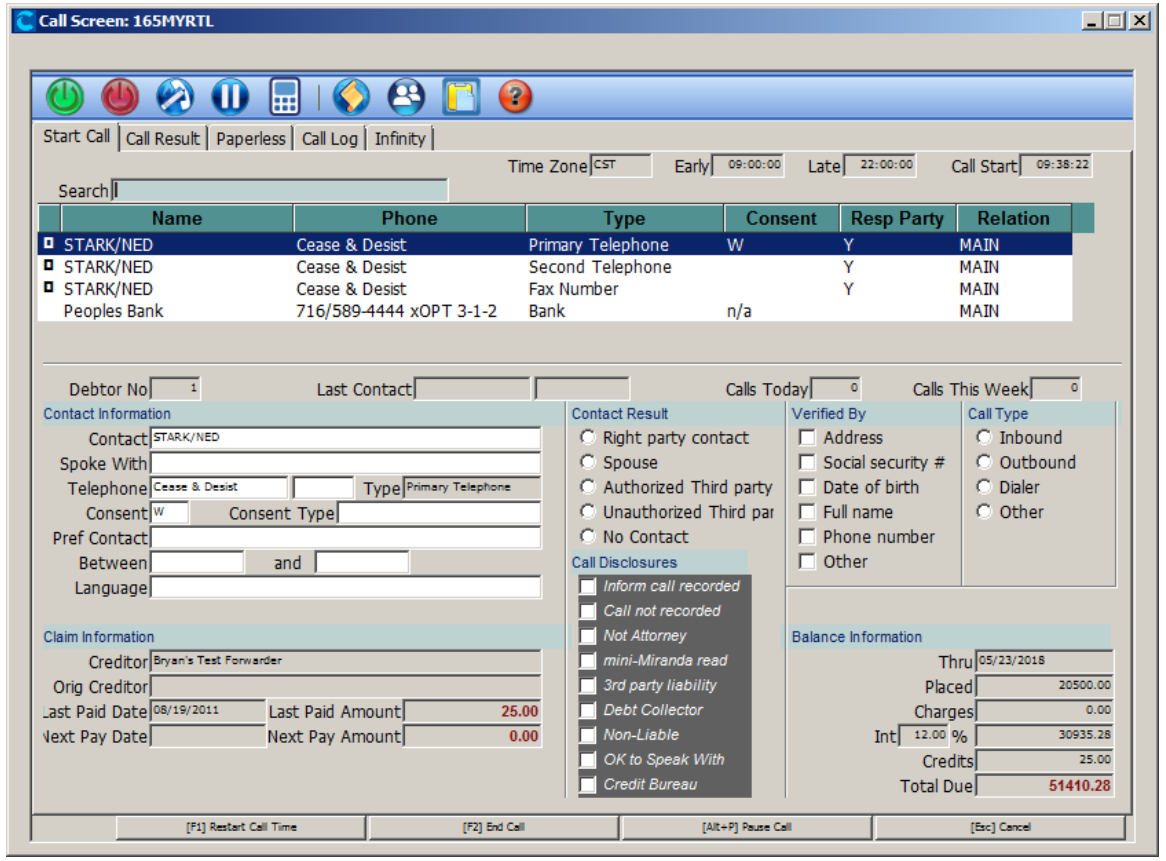
Call Screen Toolbar

- Icons are mapped to keyboard shortcuts.
- Shift = +10
  - Sample F18 = Shift – F8
- Ctrl = +20
  - Sample F25 = Ctrl – F5



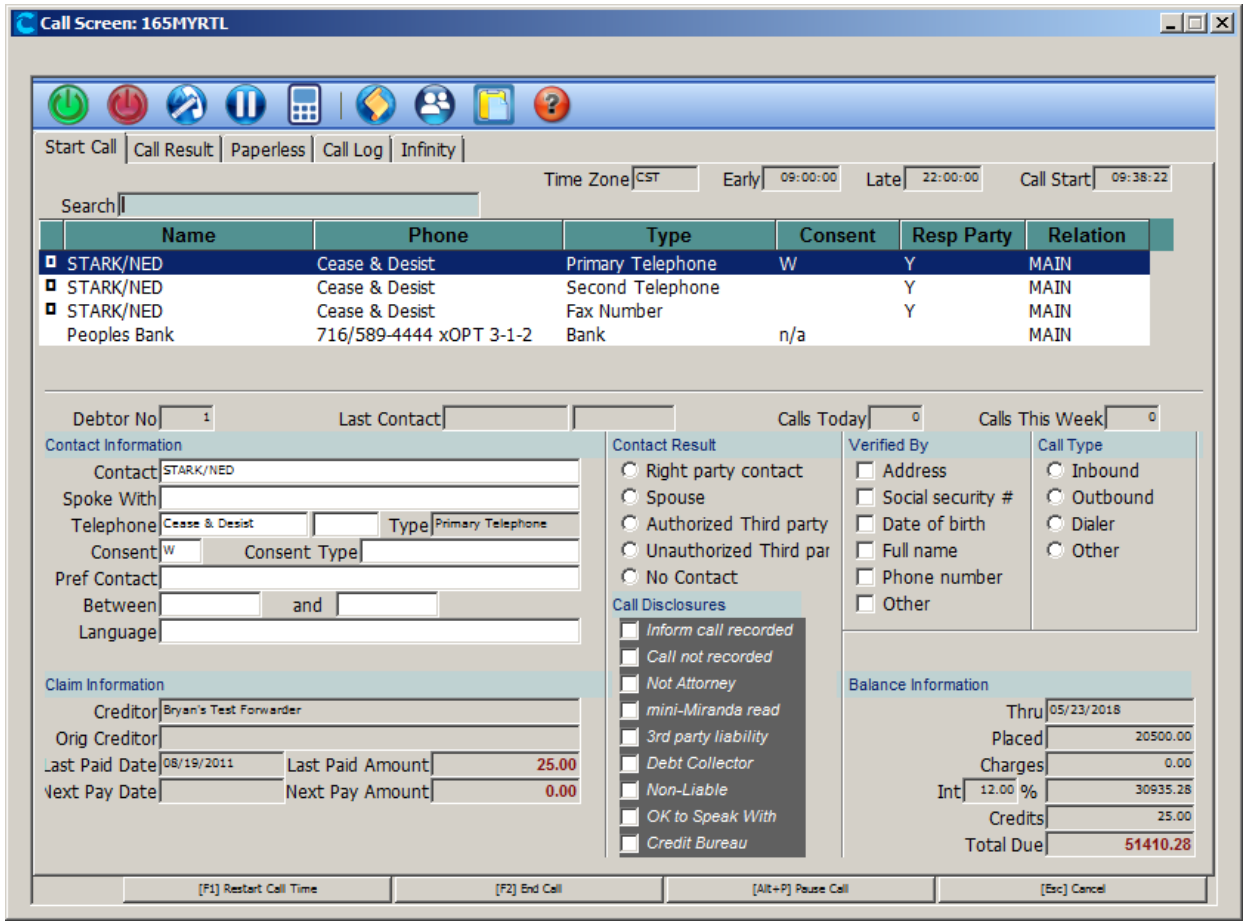
Start Call Tab

- Displays the phone information for all the consumers on the claim.
- Use the search & mouse to pick the desired phone #.
  - Use F4 Edit Phone # to edit consumer phone #'s
  - F12 – Edit Debtor
    - The desired phone # must be on the claim, you may use related parties as appropriate.
- Update Contact Information including
  - Consent
  - Preferred contact information
  - Preferred language.
- Select Contact Results
  - Depending on choice, you will be asked to name the person you talked with.



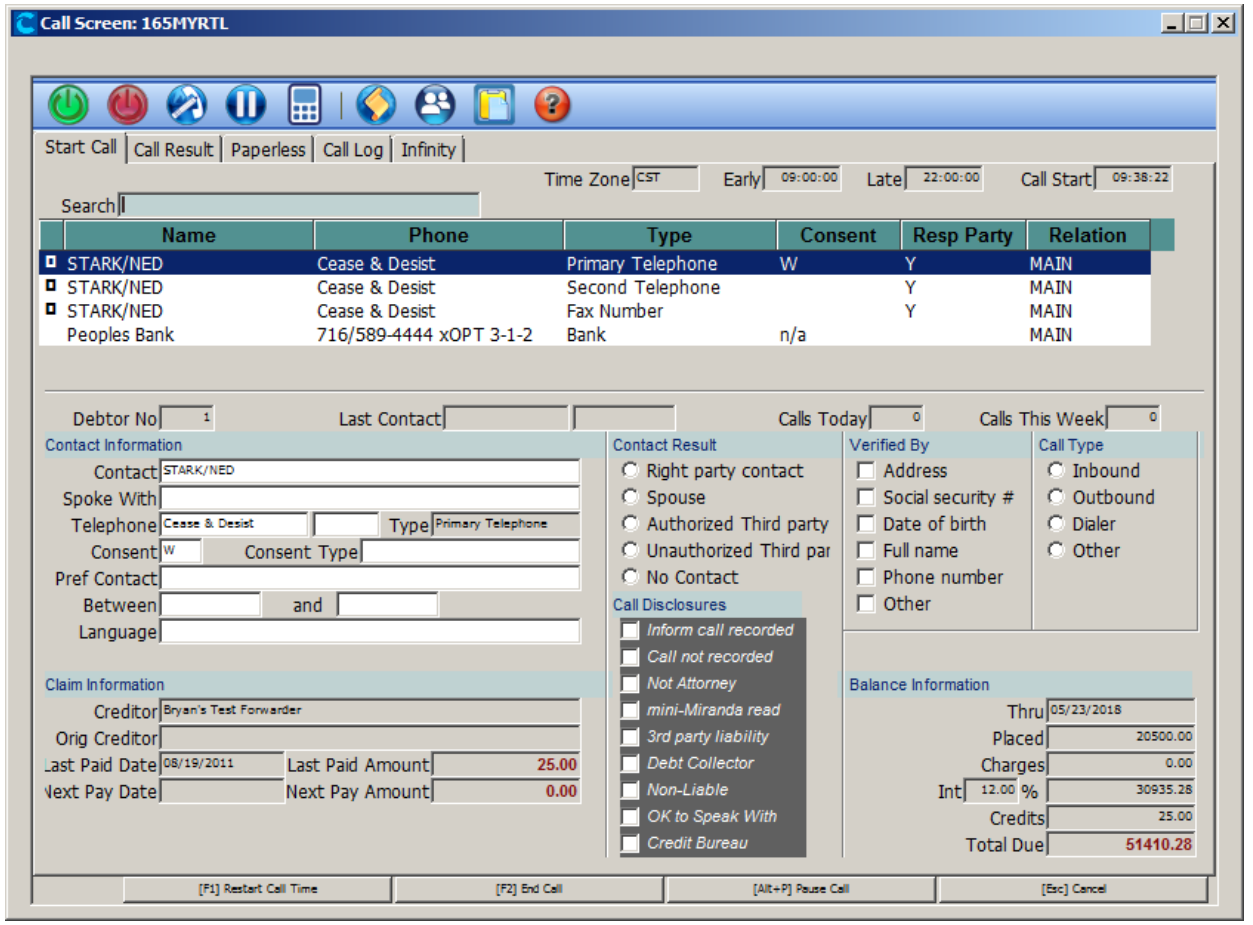
Start Call Tab (Continued)

- Select all appropriate Call Disclosers
  - We will cover CALL_SCREEN.INI/CUSTOM
- Select all appropriate Verified By
- Select Appropriate Call Type
- Claim & Balance Information is provided
- Remember you may use the Toolbar
  - Pause Call Ctrl-F5 / Alt-P
  - Ctrl-F12 to return to Call Screen
  - Shift-F6 Payment Calculator
  - F18 – Talk-Off Scripts
  - F12 – Edit Debtor
  - F11 – Claim Summary



Start Call Tab (Continued)

- Time Zones by Zip Code & Area Code will be used to mask Phone #’s and warn the collector.



of Attempts

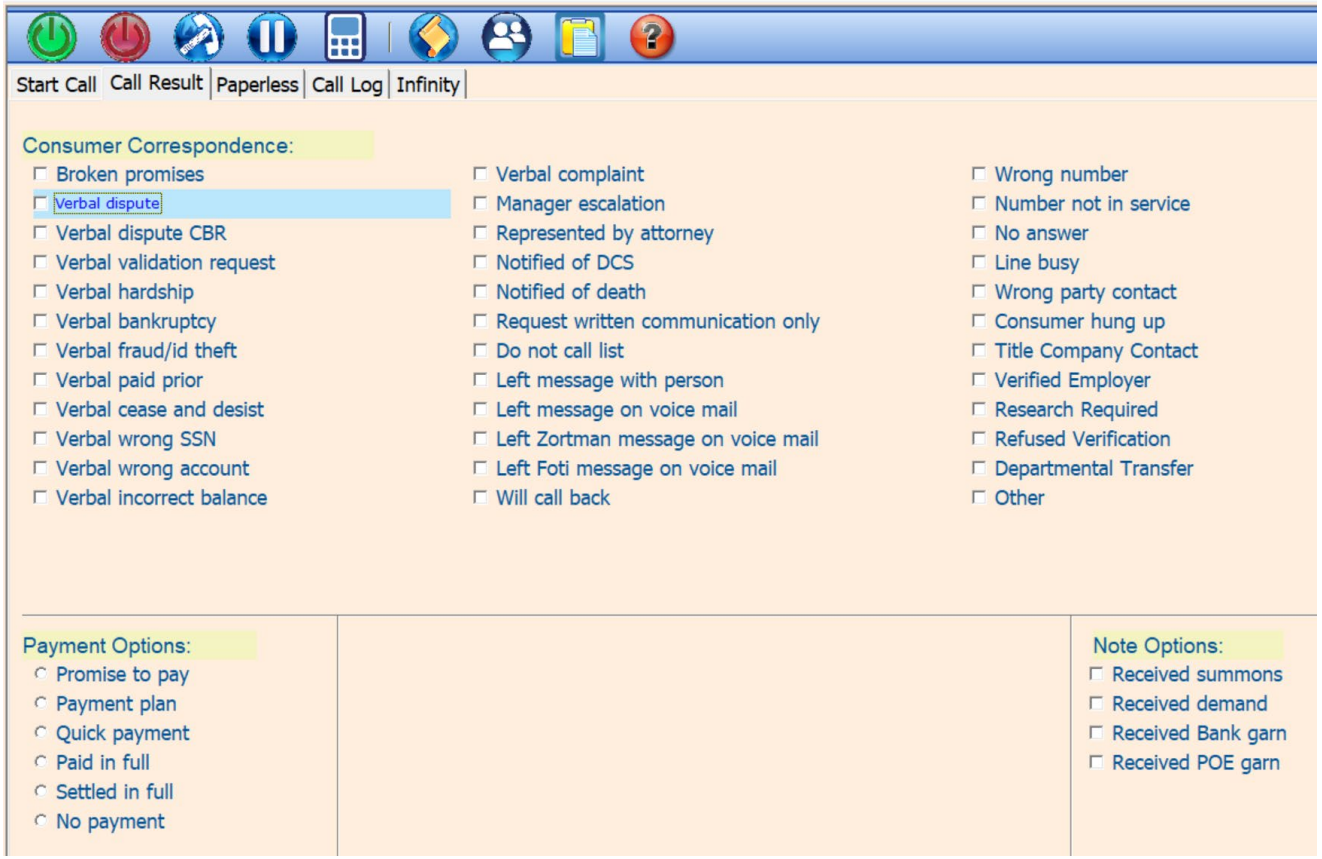
- See: **Call_Screen.INI/Custom**
- [MAX_ATTEMPTS_TODAY]
  - Governs the # of attempts allowed daily
- [MAX_ATTEMPTS_WEEK]
  - Governs the # of attempts allowed weekly
- [MAX_CONTACTS_WEEK]
  - Governs the # of attempts successful contacts weekly
- Multi-State allows you to pick values by State
  - DEFAULT also supported.

Talk-Off Scripts

- F:\CLSINC\CALL_SCREEN
  - \Clients
    - Specify ##### ,Sort Code or EDI Type (IE C_CON or TRAK)
- ||TITLE:
  - Title used to be displayed when selecting talk off scripts.
  - Or the title will be the name of the HTML document.
- Similar to Claim Summary, use “\SQL VARIABLES\” to populate values.
- Add Key Words to file name for Defaults
  - PRESUIT
  - POSTSUIT
  - JUDGMENT
  - BANKRUPTCY
  - DECEASED
- Script will generate an HTM document that may contain any valid custom HTM.

Call_Results Tab

- Consumer Correspondence Section
  - Field Level Events may be utilized to trigger diary codes
    - Comments, queue, add new etc.
    - See Call_Screen.ini/Custom
    - [CALL_RESULT.Result Code]
- Payment Options Section
  - Each option may have additional information
  - Promise2Pay – Payment by Diary Code
  - 1099 Notification
    - Settled in Full
    - See Call_Screen.ini/Custom



Call_screen.ini defaults

- See: **Call_Screen.INI/Custom**
- [DEFAULTS]
  - Contact.Result
  - Call.Type
  - Language
  - Promise2Pay
  - 1099Notification

Call_screen.ini defaults

- See: **Call_Screen.INI/Custom**
- [CALL_RESULT._____]
  - Setup FLE for each event
    - Diary.add
    - Diary.del
    - Paper.add
    - Paper.Comment

Call_screen.ini defaults

- See: **Call_Screen.INI/Custom**
- [REQUIRE_MINI_MIRANDA]
  - Itemize the Call Result Options that requires Mini Miranda to be read to the caller.
- [REQUIRE_CALL_RECORDING]
  - Itemize the Call Result Options that requires the caller must be informed the call is recorded.
- [REQUIRE_CALL_RESULT]
  - If selecting one of these Contact Results, a consumer correspondence must be selected.

Call_screen.ini defaults

- See: **Call_Screen.INI/Custom**
- [CALL_RESULT_OPTIONS]
  - Allows you to control the order and Call Result Option Description.

Call_Log.ini

- See: **Call_Log.ini**
  - **Warning Not User Serviceable**
  - Defines the behavior of the call screen **[Look don’t touch!]**
- [PREFERRED_CONTACT_METHOD]
- [CALL_RESULT]
- [PREFERRED_LANGUAGE]

Call_Log.ini

- See: **Call_Log.ini**
  - **Warning Not User Serviceable**
  - Defines the behavior of the Call Screen **[Look don't touch!]**
- [TRIVIUM.AGENT_RESULT]
- [TRIVIUM.LANGUAGE]
- [TRIVIUM.CONTACT_TYPE]
- [TRIVIUM.CONTACT_RESULT]
- [TRIVIUM.CONSUMER_CORRESPONDENCE]
- [TRIVIUM.PIF_TYPE]
- [TRIVIUM.SIF_TYPE]

Call_Log.ini

- See: **Call_Log.ini**
  - **Warning Not User Serviceable**
- Defines the behavior of the Call Screen **[Look don’t touch!]**
- **[TRAK.RESULT]**
- **[YGC.PCODE]**
- **[vX.PCODE]**

Call_Log.ini

- See: **Call_Log.ini**
  - **Warning Not User Serviceable**
  - Defines the behavior of the Call Screen **[Look don't touch!]**
- **[vX.Inbound.AdvaFile]**
- **[vX.Inbound.Consumer.RPC.001]**
- **[vX.Inbound.Consumer.RPC.002]**
- **[vX.Inbound.Consumer.RPC]**
- **[vX.Inbound.Consumer.Spouse]**
- **[vX.Inbound.Employer]**
- **[vX.Inbound.Insuranc]**
- **[vX.Inbound]**

Call_Log.ini

- See: **Call_Log.ini**
  - **Warning Not User Serviceable**
  - Defines the behavior of the Call Screen **[Look don’t touch!]**
- **[vX.Outbound.AdvaFile]**
- **[vX.Outbound.Consumer.RPC]**
- **[vX.Outbound.Consumer.Spouse]**
- **[vX.Outbound.Employer]**
- **[vX.Outbound.Insuranc]**
- **[vX.Outbound]**

Call_Log.ini

- See: **Call_Log.ini**
  - **Warning Not User Serviceable**
  - Defines the behavior of the Call Screen **[Look don’t touch!]**
- **[DISCIWE.CALL_TO_FROM]**
- **[DISCIWE.CALL_TYPE]**
- **[DISCIWE.CALL_RESULT]**

Q
A

The Mastermind Series

To learn about upcoming trainings:
https://vertican.tech/mastermind/

To view past trainings:
https://vimeo.com/ondemand/verticanmastermindseries/