

## Assister Escalation Pathway

### Purpose

The purpose of this document is to provide a straightforward escalation process for Pennie-certified Assisters to utilize as a guide to escalate support on behalf of their customers or themselves. An escalation is defined as any scenario that blocks an Assister from enrolling their customers. First-call resolution and/or support are considered general inquiries that do not rise to the level of an escalation.

### General Inquiries vs. Escalations

The regular flow of Assister telephone calls to 1-844-844-4440 consists of the Assister presenting a question to a Pennie Customer Service Representative (CSR) for initial discussion and alignment for understanding. Additional fact finding, discovery and Q&A in determining possible options for solutions will be a part of the initial assessment. The call will be resolved by the CSR as closed if the Assister's questions are answered to the Assister's satisfaction and no further action is required (no ticket is created).

If first-call resolution is not possible, the Assister may request to speak with a supervisor to escalate the matter at hand. If a supervisor is unavailable to take the call, the CSR will submit an escalation ticket requesting subsequent follow-up to the Assister when the ticket has been reviewed and completed. If resolution is not reached with the supervisor, an escalation ticket will be created by the Contact Center supervisor for Pennie staff review. Instruction will be provided to the Contact Center for follow-up with the Assister once Pennie staff performs their review of the escalation ticket.

### Best Practices

- Note the ticket number, what it addresses, and allow for processing time.
- If a ticket is created, provide the best telephone number to receive a call back and the best availability to eliminate "phone tag" and repeated call back attempts.
- Supervisor access is available upon request and not a blocker to issue resolution.
- If additional action is needed to solve the existing issue after exercising this escalation guidance, send an email to [Assisters@pennie.com](mailto:Assisters@pennie.com). Please be aware that additional processing time will occur as Pennie staff collaborates with the Contact Center to compile and review the issue.

### Assister Escalation Path | CC: 1-844-844-4440

1	Clear Identification of Issue:	What is the root cause of the problem at hand?
2	Resolution/Expected Outcome:	What is needed to resolve the issue?
3	Lead/Supervisor Escalation:	Is there a need for escalation?
4	Ticket Creation:	Is additional action is needed to resolve issue?
5	Ticket Logging:	CSR provides Assister with the ticket#
6	Ticket Follow-up:	CSR provides estimated processing time for ticket processing; 5-7 days of processing time during OEP; escalations 3-5 days; 3-5 days of processing time outside of OEP; escalation 2-3 days; We prioritize access issues or issues stopping someone from enrolling
7	Account Comments:	Articulation of specific items discussed, including issue, resolution, and if action is needed; what was advised, etc.