Welcome to Five9!

Using Five9 is easy! This allows us to track and record calls.

Start by going to https://login.five9.com/

Your username:_____

Your password:_____

Select "Agent"

To use some of these Five9 applications, you need to download and install Java Runtime Environment in your computer.

Agent
Communicate with your customers and prospects

Customer Support
Access the support team, documentation, cases, and solutions

CRM Integrations
Configure integrations with leading on-demand CRM vendors

Training
Access Five9 University for role-based training and certification for administrators

Tools & Add-Ons
Install and configure add-ons for your applications

My Settings
Change your password and other personal settings

The full set of terms and conditions of service are contained in your current contract. If you require a new copy, please contact your account manager. Please note that as stipulated in your contract, all local and long distance rates reflected in VCC are post surcharge.

If you are using a CHROMEBOOK please select "WebRTC" as your Station Type and type in your provided Station ID. If you are on a desktop or regular laptop please choose "Softphone".
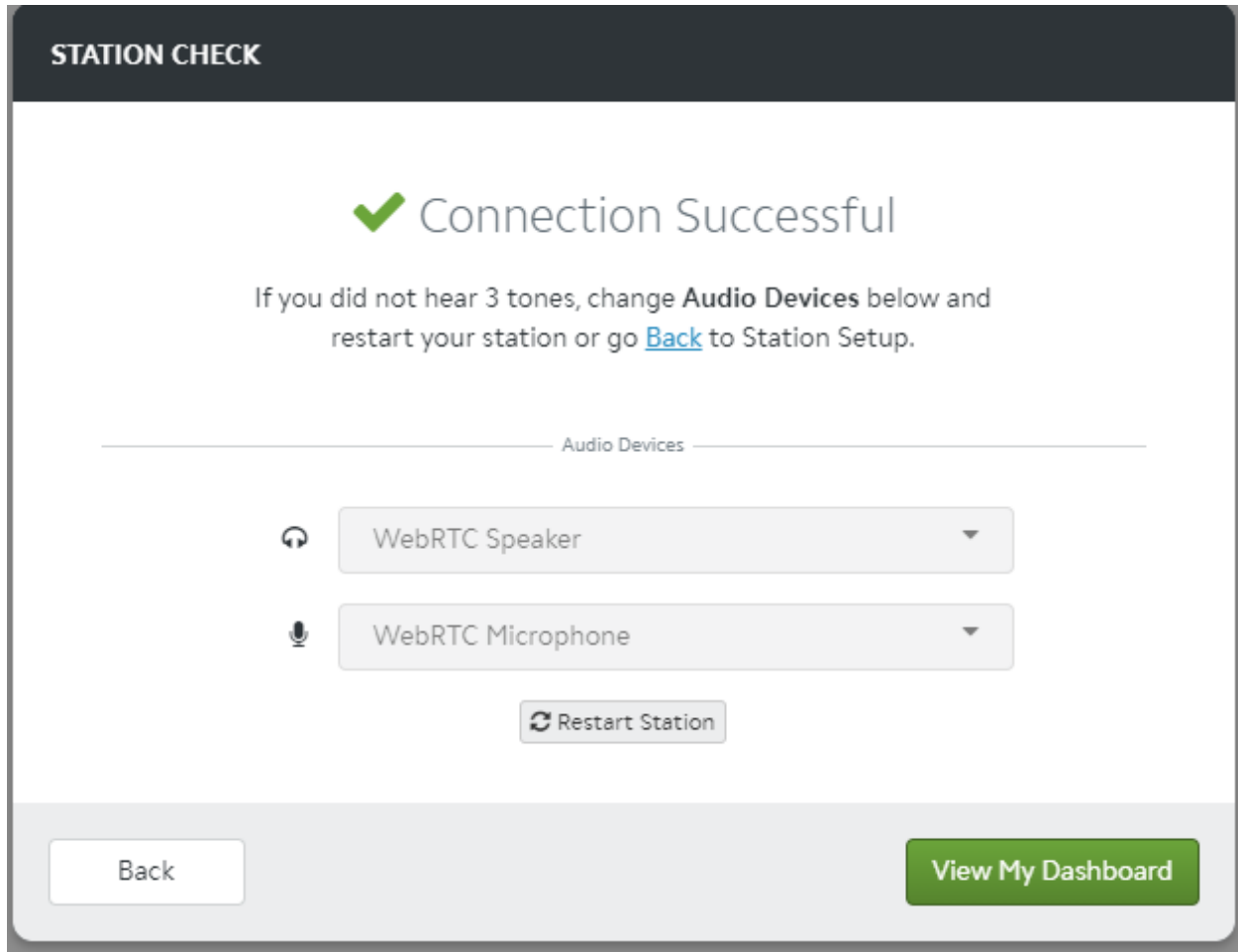
STATION SETUP

Station Type	Softph...	**WebRTC**	PSTN	Gateway	None
Station ID	Will be provided				

Log out   Next

Microphone Permission:

After selecting WebRTC, agents may be prompted to grant access to their browsers to use their Microphones for audio. Agents should select "**YES**" and "**SAVE FOR FUTURE**" option.

WebRTC will use the default Audio Device on Sound Settings. Make sure that headphones are marked as the Playback and Recording default on OS.

For Chromebook Settings:

1. Click on the System Tray (where the clock is), and look at the volume slider.
2. Select the small arrow > to navigate to the Audio Settings.
3. Make sure that the headphone and mic are selected.

To Dial Out:

Go to the "CALL" icon on the left-hand side. Type in the number you want to call, area code first.

To end the call you will have to select a "Disposition" reason – this should always be "Open Enrollment".

Steps when enrolling over the phone

Clearly state your name, the company you are calling on behalf of, and the reason for your call

Enroller: *"Hello, my name is Georgia and I am calling on behalf of the XYZ School District. I'm calling today to discuss your benefit options. Is now still a good time?"*

2. Initial Notice of Recording

Enroller asks: *"I want to let you know that our call is being recorded for purposes of completing the application process and we use your voice signature as your authorization to participate in any of the plans you decide to enroll in through payroll deduction. This recording is saved and may be shared in the future upon request by either the insurance carriers for any plans which you enroll in, as well as your employer who manages any premiums being deducted from your paycheck. Is that okay?"*

Once the employee responds *"Yes"* and the record is open, enroller verifies personal information.

3. ALWAYS offer *ZOOM!*

From the group's benefit portal, the employee can click on the ⬤ Zoom icon on the top right. Give them your meeting ID and share your screen.

4. Verification of Employee's Personal Information

Enroller asks: *"Before we begin reviewing the benefit programs available to you, I need to verify some of your personal information. This ensures that I have the right record pulled up in the enrollment system, as well verifying the accuracy of what [Group Name] has provided to us.*

Example:

DO: Would you please verify your date of birth and last four of your social?

DO NOT: Is your date of birth August 14 and the last four of your social 5661?

✓ name	✓ employment information
✓ date of birth	✓ date of hire
✓ social security number	✓ payroll deduction mode
✓ address	✓ salary, applicable for disability plans only
✓ phone number	

5.   Acknowledgment of Pre-Existing Condition Limitation on Plan

Enroller asks: *"Please note that the plan in which you have enrolled in [PLAN NAME] has pre-existing limitation provision or exclusion period that would apply towards any existing medical condition present at the time in which you are enrolling in this plan and have a claim submitted during the initial [# of months] from the effective date of coverage. Do you understand the pre-existing condition limits?"*