

## Problems in the Field:

If you have problems in the field call them in As Soon As Possible. It is easier to fix a problem on Monday than fix the problem on Friday and have a weeks worth of issues to correct also. If you are working on a case where there are other counselors available, check with them to see if they are having the same problem. Sometimes they can help out.

## DAR's:

Daily Activity Reports (DAR's) are a report generated in Reportback and used to determine your pay and to calculate your call in data (production). DAR's are essential for daily case management, participation, reports, and app submission verification. DAR's are due in by 8 am PT the following day. If there is a problem and for some reason you can't get your DAR's done by 8 am PT you must inform by e-mail or phone call the reason for missing the deadline by 8 am PT. Its very important to meet this deadline. Monday's DAR's are the most important as they are for the entire previous week. Make sure that you date your DAR for the day the production was done. Please note that if you have a change in a previous day's total, you must make note of it, and resend the DAR for that date. This may be on the same excel sheet or on a separate one, as the current DAR. Your paperwork is also due in the CA office by end of business on Monday. If your paperwork will not be in on time for any reason, call or e-mail us and let us know by Monday 8am PT. Please be on time regularly.

When filling out your DAR's there should only ever be one line per day, unless you worked on more than one case on a given day. If you are working a full day enter the day type in the Day Type ID1 box and leave the Day Type ID2 box with the 0 in it. If you have a two half days on the same date such as ½ day train, ½ day travel, these should both be on the same line. The first should go in the Day Type ID1 box and the second in the Day Type ID2 box. (Please note that your DAR will show a .5 in the DayTypePercent column anytime you have something in the Day Type ID2 column. If you also have something in the Day Type ID1 box you get .5 for each and therefore a full day. DO NOT change the DayTypePercent.) If you only have a half day, place the type in the Day Type ID2 box leaving a 0 in the Day Type ID1 box. Do NOT make a separate line for each half day for the same date.

If you are having problems with your Reportback or e-mail you must e-mail or phone in your DAR information. If you phone in your information you are still required to submit your DAR as soon as is possible. This information either e-mail or voice mail, is due in by 8 am PT the following day (the same as DAR's). This should contain all the same information you put in your DAR's in Reportback. How many people were contacted, interviewed, the number of each type of app, the total value of each type of app. If you were not enrolling, but traveling, conducting group meetings, training, or in the office, these need to be called in as well.

### EXAMPLES:

Spoke to 15, Interviewed 6, NEC Referrals 2, Enrolled: 3 ACC for \$2500, 2 CI for \$3450, 4 UL for \$2875.  
Or ½ day travel, ½ day training.

## Primary Insured and Insured fields:

In our new system the employee name will go in the primary insured fields and the dependent name will go in the Insured field. Also make sure you mark that this is a S(pouse) form in the correct column C(hildren) also need to be marked correctly. If it is the EE who is insured then the EE's name will go in both sets of fields. Never leave these fields blank.

## Double Check Your Work:

All counselors should take a couple of minutes and double check their work. It can literally save us hours on this end. Make sure the SS#'s are correct and in the SS# format. Enter them all as 000-00-####. Make sure Dependents are properly marked and their names are entered properly (Last name, First name [make sure there is a space between the comma and the first name]) in the Insured field. Make sure your Product type is accurate. Make sure your MODE is correct. Make sure you enter correctly P or E, whether it is a paper or electronic application. It is our policy with the new system that you should use ALL CAPS. Always use Caps for Paper or Electronic and for Employee, Spouse or Child. It looks more professional if we are consistent, Caps are easier to read, and it is Policy. Make sure all the paperwork is facing the same way and that all the forms for an employee are together Make sure your EE# is on all paper you send in (place it in the upper right corner if it doesn't have a designated place preprinted on it.

## Variances:

Variances are checked to ensure apps have not been cancelled, lost, or misplaced. This protects you and the employee. If there is a discrepancy between what you call in and what your application register has on it when we get it you will be contacted to explain the discrepancy (or variance). If you call in \$9000 and your app register only has \$8000, we need to know why there is \$1000 less than what you called in. On the other hand if your app register has \$500 more on it than what you called, in we need to know why we have \$500 more than expected. Counselors should not call in estimates of what they wrote because they are pressed for time. If you take the time to give us an accurate Call In number, you will save yourself time later when you are asked to explain the variance. If you have a cancellation or an employee comes back and wants to increase an amount from a previous day, let Jennifer or Scott know when you call in the next time and we will correct the numbers. This prevents the EOI office from having to call you while you are busy enrolling or on a day off.

## Prompt Responses:

When EOI calls you we are seeking missing information that will help get applications issued. Many requests are time sensitive. If for some reason we have to call you, (send you an e-mail or leave you a v-mail) please respond promptly. This means some time in the same day or at the latest early the next morning. If you are having problems with cell phones or e-mail, ask another counselor to let us know for you, or possibly even call the numbers in for you. We are a team and need to function as one.

## We are here to help:

Remember no one is going to be upset because you are calling when there is a problem. We are here to help and we can't do that if you don't let us know there is an issue. If you call us with a problem, we are more than happy to walk you through it to find a solution. EOI prefers to help you correct problems early so we don't have to spend the extra man hours to correct things that could have been prevented. We are here to help, when you need it.

## Naming your documents:

Each report should be named with the following information. Case Name, Type of Report (APP REG, DAR, Census, or Census Dep), Counselor #, and the date in this format Year(2012)-Month(05)-Day(08). Please note the zeroes in the example above. Month and Day must be 2 digits so for 1 thru 9 must be 01 thru 09. Remember the APP REG, Census, and Census Dep all use Mondays Date. The DAR uses the date the production was done on.

Application Register Example:

**Banner APP REG 208 2012-07-30.xls**

Daily Activity Report Example:

**Banner DAR 208 2012-07-30.xls**

Census Report Example:

**Banner Census 208 2012-07-30.xls**

Dependent Census Report

**Banner Census Dep 208 2012-07-30.xls**

# Contact Information

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DAR's

Scott Crone (Application Coordinator)

Andie Marino (Office Administrator) Questions regarding Daily Callin Production Reports.

IT Support

Kyle Peterson (Customer Service)

Erica Koontz (Customer Service)

800-229-4364

Santa Ana Office

714 542 1042

FAX Line

Ext 2020

Daily Call Ins

Ext 1241

Scott Crone

714 881-1241

Direct Line

Ext 4647

Andie Marino

312 428-4647

Direct Line

Ext 0 or 1250

Front Desk

714 881-1250

Direct Line

Ext 1247

Kyle Peterson

714-881-1247

Direct Line

Ext 1243

Erica Koontz

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Direct Line