

Assignment Manager

Summary:

Assignment manager was constructed using the Siebel Vanilla "Service Request" Assignment Object. Some workflow columns and assignment attributes were created to utilize fields not included in the Vanilla assignment object. Assignment rules and criteria were built; employee skills were identified, and workload rules were defined to determine to whom a case will be assigned.

Assignment Rules:

Referred By – "White House" or "Congressional Office": The primary assignment rule, which overrides all others: if a case has a "referred by" value of "White House" or "Congressional Office," the case will be assigned to Joyce DeMoss or other specified member of the Ombudsman Office.

The remainder of the rules are based upon the loan servicing agent:

Servicing Agent - "Unknown": The client expressed concern that new cases often have the incorrect servicing agent listed. Since assignment manager will rely upon the "servicing agent" field to determine an appropriate owner of the case, this information must be entered correctly or the value of "unknown" must be selected until such time as NSLDS data is available on a regular basis. This is an important point to make in training: if the intake specialist is not confident that the correct servicing agent has been provided, then "unknown" should be selected. Any case with an "unknown" servicer will be assigned to Joyce DeMoss so that the appropriate servicing agent can be determined and the case can be assigned to the correct group.

Servicing Agent – "DCS": The case will be assigned to a member of the DCS team. Team members may not have more than 25 open cases at a time. A case will be assigned to the team member with the least number of open cases. If all team members have a maximum work load, then the case should be assigned to the DCS team lead, Martha Windsor.

Servicing Agent – "Direct Loans", loan type **NOT** "Direct Consolidation": The case will be assigned to a member of the Direct Loan team (Chris Joy is only current team member). Team members may not have more than 25 open cases at a time. A case will be assigned to the team member with the least number of open cases. If all team members have a maximum work load, then the case should be assigned to the DCS team lead (Joyce Demoss).

Servicing Agent – "Direct Loans", loan type - "Direct Consolidation": The case will be assigned to a member of the DL Consolidation team, specifically Lisa Howell.

Servicing Agent – not "DCS," "DL," "Unknown": The case will be assigned to a member of the NCS team. Team members may not have more than 25 open cases at a time. A case will be assigned to the team member with the least number of open cases. If all team members have a maximum work load, then the case should be assigned to Joyce DeMoss.