

# Customer Service Center Operations Manual

Remote Processing  
CSCOM-802

Original Date: 12/15/2015

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## OVERVIEW

OnBase may be used to transfer work from a work center to a CSC or from a CSC to another CSC. The two types of processes offered by OnBase are:

- **DESIGNATED WORK** (Refer to [Designated Work Process Below](#)) – work is manually scanned (upon authorization from CSMA/District Office) into OnBase from one location to a designated CSC for processing. The designated CSC is solely responsible for processing the scanned work. The following transactions may be processed using this method:
  - Supplemental Liens.
    - Work must be processed within 3 days of receipt from customer.
    - An email notification is received by both the scanning and processing CSC upon receipt and completion of a batch of Supplemental Liens.

OR

- **UNDESIGNATED WORK** (Refer to [Undesignated Work Below](#)) – work is indexed in OnBase and processed as business allows in any CSC (per CSC Management directives). The following work may be processed using this method:
  - SR-22/FR-44/Insurance Orders/Insurance Notices **END REVISION>>>>>**

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## DESIGNATED METHOD

### SCANNING BATCH WORK FOR PROCESSING TO ANOTHER CSC

#### Front Counter CSR:

1. Inform the customer/institution that their work will be available for pickup in 3 days.
  - Ensure the customer/institution provides their Federal ID number or Dealer Number.  
**NOTE:** If the customer does not have or is unable to provide his federal ID number, use CSC-specific assigned generic customer number for transferring work.
2. Contact District Management for approval to scan and submit batch work to another CSC using OnBase.  
**Important:** The scanning CSC may only scan and submit batch work to the CSC designated by CSMA/District Office.
3. Verify the authenticity of secure documents (such as titles, raised seals, etc.) and appropriate signatures.

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4. Scan batch documents into OnBase using back office scanner (refer to [ONB-142](#) for processing steps)  
**END REVISION>>>>>**

- If a customer submits multiple batches of documents to be processed, each batch must be scanned separately into OnBase.

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5. Receive e-mail confirmation of completed batch scan.
6. File the original batch paperwork and payment (if applicable) in a secure place until the batch work is processed and an email notification is received. **END REVISION>>>>>**

### PROCESSING BATCH WORK FROM A CSC/WORKCENTER

#### CSC Management/Designee

1. Review email submitted by OnBase indicating the batch work is ready for processing.
2. Assign Front Counter CSR(s) to process work.

#### Processing CSR

1. Access workflow in OnBase.  
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2. Log into MySelect and open the deferred settlement. **END REVISION>>>>>**
3. Ensure that the batch work is processed on the correct deferred settlement.
4. Refer to appropriate VLIC/DLG procedures for business requirements:

Transaction Type	Related VLIC/DLG
Supplemental Liens	<a href="#">VLIC-3.620</a>

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5. Process the batch work in MySelect and OnBase (refer to [ONB-142](#) for processing steps).
6. Close the deferred settlement.
7. Request the manager or designee to send the deferred settlement report to OnBase. **END REVISION>>>>>**

#### RECEIVING COMPLETED WORK FROM PROCESSING CSC

##### CSC Management or Designee:

1. Review email from OnBase indicating work is completed.  
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2. Assign a CSR to complete processing.

##### Assigned CSR

1. Open OnBase and determine if any work was returned.
  - Refer to [ONB-142](#) for the process of returned work.
2. Retrieve and print the "Transaction Activity Deferred Settlement Report" from OnBase. **END REVISION>>>>>**
3. Contact the customer/institution to advise them that their work is ready (if applicable).
4. Collect total amount due for the processed work (if applicable).
5. Record batch payment in MySelect.  
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6. Date stamp the "Transaction Activity Deferred Settlement Report".
7. Give the customer the following:
  - a. unprocessed work, Customer Information Form and original payment (if applicable), and
  - b. the stamped "Transaction Activity Deferred Settlement Report" and/or receipts.
8. Hold all original paperwork in accordance with back office scanning guidelines. **END REVISION>>>>>**

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#### UNDESIGNATED METHOD

##### CSC Manager

1. Assign Front Counter CSR to process work as business allows.

##### Processing CSR

1. Access workflow on OnBase
2. Refer to appropriate VLIC/DLG procedures for business requirements:

Transaction Type	Related VLIC/DLG
SR-22/FR-44/Insurance Orders	<a href="#">VLIC-4.430</a>
Insurance Monitor Notices	<a href="#">VLIC-4.425</a>

3. Process the work in MySelect and OnBase (refer to [ONB-141](#) for processing steps) **END REVISION>>>>>**

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#### POINTS TO REMEMBER

##### Designated Points to Remember

- If the customer wants his work processed immediately, he is **NOT** eligible for this process.
- The processing office is responsible for end of day auditing.

- Documents do not have to be re-scanned into OnBase once they have been processed remotely.

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**Undesignated Points to Remember**

- The CSC Manager or designee is not required to complete an audit after processing undesignated work.

**END REVISION>>>>>**

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