Phone Use – Procedures and Etiquette

GENERAL DESCRIPTION: This procedure covers phone etiquette guidelines, personal long distance, and instruction on phone and voice mail.

PRIMARY RESPONSIBILITY: Department directors; Superintendent

PROCEDURAL STEPS:

Phone Etiquette

The telephone is one of our links to the outside world, and subsequently, conveys what kind of organization we are and what message is being communicated. The following guidelines pertain to those positions which receive and transfer incoming calls, but are also helpful in any position.

1. Speak directly into the mouthpiece. If this is a problem because of using other equipment while on the phone, consider using a headset to free up your hands.

2. Do not eat or chew gum while talking on the phone.

3. Answer the call within two to three rings whenever possible.

4. In general, identify the organization and yourself when answering. Refer to your department director for the preferred way to answer.

5. Avoid covering the receiver with your hands. If necessary, put the caller on hold.

6. When placing a call on hold, ask the caller, “Do you mind holding?” or “May I put you on hold?” Remember to wait for the answer.

7. If the caller cannot hold, offer to take a message, transfer to another party, or arrange for them to return the call.

8. When returning to the caller, remember to thank them for waiting. When transferring a call, call the department or person and make sure they can take the call before putting it through. If necessary to transfer to a person’s voicemail, ask the caller if they mind and give them a direct number to use in the future (if applicable).

9. If the person is able to take the call, give them the caller’s name, their request, and any other relevant information.
10. When asking the caller for their information, an appropriate way to ask is: “May I tell her who’s calling please?”—not “Who is this?”

11. If the person is unavailable, avoid using “He’s in conference” or “She’s in a meeting.” These are overused. The most appropriate response is that someone is “not available” or “unavailable.” Try to indicate when the person will be available (e.g., “She’s not available, but I expect her back in the office at 3:00 p.m.”).

12. Other inappropriate responses:
   - He isn’t in yet (and it’s 10:00 a.m.)
   - She’s out for coffee
   - He’s gone for the day (and it’s 3:00 p.m.)
   - She’s playing golf
   - He’s in, but he’s busy

In general, try to use a positive tone and avoid sounding abrupt. Phone etiquette is built from following these few basic guidelines and can be summarized in one word: “Courtesy.”

**Personal Long Distance**

1. A CESD employee who makes a personal long distance phone call or fax will complete a “Personal Long Distance Telephone Log,” showing the date of the call/fax, the area code and number, and the city/state.

2. The phone log will be submitted monthly to the accounts payable clerk.

3. The accounts payable clerk will return the form with the actual cost of the calls/faxes.

4. The cost of the calls/faxes will be withdrawn from the employee’s paycheck through payroll deduction.

**Phone and Voice Mail**

1. **Logging into Voice Mail:** When logging in to the phone system for the first time, your default password will be 12+ your phone extension.
   
   - Get dial tone, then press MSG/INBOX button or dial 4221
   - Enter your mailbox number and # key (if at your phone, press # only)
   - Enter your 4-digit password and # key
     - The first time you log in, you will use your 6-digit default password. The system will then ask you to change your password. Press 84 to change your password.
     - Your new password must be at least 4 digits long. When the system prompts you for the old password, key in the default password.
2. **Logging into Voice Mail from Out of Office:**
   - Dial the voice mail telephone number: 503-675-4221
   - Enter mailbox number and # key
   - Enter your password and # key

3. **Options at Main Menu:**

   2  Play your messages (see options below)
   75 Compose a message – for sending message to multiple mailboxes (see options below)
   82 Record outgoing greetings – what the caller hears (see options below)
   84 Password change – minimum 4 digits, maximum 16
   85 Personal Distribution List – 9 list, 99-mailboxes
   829 Personal verification – your spoken name; caller hears this to verify; plays when voice mail is forwarded to your extension (see options below)
   83 Log off

   **2 Play Message Options**
   1 Skip backward 5 seconds
   3 Skip forward 5 seconds
   # Pause a message
   2 Resume playing a message
   4 Go to previous message
   5 Bypass a greeting
   6 Save message and skip to next
   9 Call sender (internal calls only)
   71 Reply to sender (internal calls only)
   73 Forward message to another mailbox
   5 Can record a message to the person receiving
   79 Sends a copy of message to the person
   76 Delete a message (also restores by prompt)
   86 Go to a specific message

   **75 Compose a Message**
   75 Enter first mailbox number on list followed by #
   5 Hear tone and begin recording message
   # End recording
   2 Review – listen to prompts for tagging, if desired
   79 Send message

   **82 Record Outgoing Greeting**
   1 Record outgoing greeting – listen to prompts
   3 Record temporary greeting – listen to prompts
   5 Hear tone, start recording
   # End recording
   2 Review (play back) greeting
4. **Transferring Caller**

- With caller on line, press Transfer
- Dial phone extension
- Wait for the person to answer
- Tell them who is on the line and ask if they can take the call
- If OK, press Transfer again and hang up
- If person does not answer, press the button next to the occupied line to go back to the caller and ask if they would like voice mail
- If yes, follow the directions below

5. **Transferring Caller Directly to Voicemail:**

- With caller on line, press Transfer
- Dial 4218; hear “Express Messaging to Mailbox…”
- Enter person’s mailbox number and # key
- Press Transfer again to end the process

6. **Leave a Message Directly in a Mailbox**

- Get dial tone and dial 4218
- Enter mailbox and # key
- Record message and hang up
- To access system off-site, dial 503-675-4218 and follow directions above