PART 1: LAUNCHING INCONTACT MAX AND MAKING OUTBOUND CALLS


2. Click the grid icon on the right corner of the page within the platform.

3. Select "Launch Max"

4. In the new pop up window that appears, select "integrated softphone" then click "connect"

5. You are now in the Max agent interface.

- **Agent State:** Where the agent can set their state or log out of the system
- **Agent Leg:** Click connect to connect agent leg before initiating a call
- **Call History:** Displays information on recent calls

**To make an outbound call:**
1. Click "New" on the bottom left side of the panel
STEP 1 FOR BOTH: PLACE CLIENT ON HOLD

If needed, you can also mute your phone so the client cannot hear you speak.

A new window panel with a search field will appear. Use the search field to locate "Transfer 211 Eng/Span" then select "Call".

Once the Line or department is selected click the blue "Transfer" Icon.

PART 2: TRANSFERRING CALLS TO GENERAL INQUIRIES AND TO THE NURSE TRIAGE LINE

GENERAL INQUIRIES

After placing the client on hold, click "Transfer/Conf"

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NURSE TRIAGE LINE

(A) After placing the client on hold, select the "Nurse Line" icon listed in the main panel. A new window will appear for language, then select "Call".

(B) Once the Line or department is selected click the blue "Transfer" Icon.

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