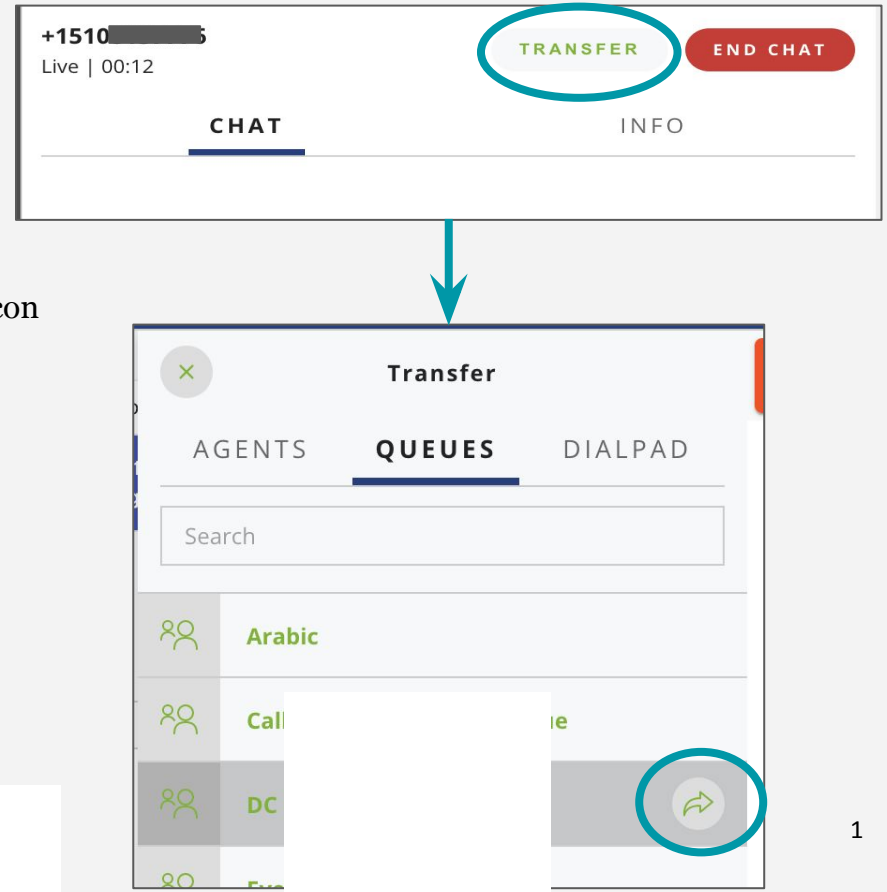
TRANSFERRING TASKS // INSTRUCTIONS

To transfer a task:

1. If you are on **a call**, put the voter **on hold**
2. Click the **transfer button** to open the **transfer menu**
   a. The transfer button for calls is the green arrow icon at the bottom of the task box
3. **Search** for the agent or queue you want to transfer to
   a. Dialpad will start a call; it is not used for task transfers
4. **Hover** over the agent or queue you want to transfer to
5. Click the **transfer button** at the right



When should I transfer a task?

- If you're **logging off for the day**
  - If you have an unfinished text or chat open where the voter has not responded, you should **requeue** the task at the end of your shift so another volunteer can continue the conversation
  - **Don't forget to make an OVL ticket** so the next volunteer knows what you've done!
- If a captain or staff want to **talk to a voter directly**
- If you have received **a task that should have gone to another contact center.**
- If a **voicemail potentially needs to be escalated** and you were unable to reach the voter, **requeue** the task so a volunteer can call them back at a later time.

Who should I transfer a task to?

- Transfer to an **agent** if there is a specific person on Twilio who needs to take the task
    - Transferring a call task to an agent will connect them to the voter directly, not start a three-way call. (If the volunteer the voter wants to speak with is not on your shift, you should look up the ticket and help the voter.
- Transfer to a **queue** (requeue) if the task can be taken by any online volunteer in your contact center *or* when the task should be handled by another contact center
    - **Queue names** connect to **contact centers.** Always check the queue name against the contact center name before transferring.
- The **dial pad** is only used when conference calling with a board of elections and the voter.