

Call Transfer Guide
Updated 5/18/2023

Banking

Digital Banking Related: Customer Service: 800-908-6600 or ext. 22231 (WARM TRANSFER)

Specialists no longer in RingCentral

Bill Pay: direct number to transfer to 888-896-4998 or provide 800-908-6600 and press 2

Existing Loans

Step 1: Warm transfer to x892 Loan Admin

Step 2: Reach out to Clara x4077, Ben Fisher x4010, Kyeper x5892

Step 3: If no answer, explain experiencing high volume of calls, take a message and TAT for callback would be 1 business day. Email service@quonticbank.com with contact information and question(s)

Step 4: If customer is upset due to lack of response, email Keith Grande at kgrande@quonticbank.com Will contact within the same day. (HubSpot Ticket **Subject Line: Customer Complaint – Name – Issue**)

Fraud:

CX Specialists: create a ticket and assign to the correct pipeline

Receptionists/Loan Admin: please email fraud@quonticbank.com with the contact details and question/issue.

TAT will be 1-2 business days

- If customer has filed a report with Fraud, goes to Fraud
- If customer needs to file a report, goes to 800-908-6600 (or CX Specialist)

Mortgage Lending:

New Mortgage & Loans:

Step 1: Encourage customers to visit our website @ Quontic.com and fill out the forms under **Mortgage** (depending on the type of loan they are looking for) and a loan officer will call them back

Step 2: If insists on speaking to someone,

CX Specialists/Loan Admin: **Warm** Transfer to Extension 4054 (receptionist line)

Receptionists: find a loan officer

Already applied, needs their pre-qualification (pre-approval) letter

Step 1: Advise caller to reach out to their loan officer

Step 2: **Warm** transfer to x4054 Receptionists

Step 3: **COMPLAINTS ONLY:** Caller complains loan officer not helping, email James Hooper at jhooper@quonticbank.com with contact details to include loan officer information

Business Loans / CRE/ LAND Loans/Commercial Loans: We do not offer PPP, SBA, Land Loans or Commercial Loans, we only offer residential lending

Go to Mortgage Page and click speak to mortgage consultant if interested in residential(3 quick questions then someone will contact them within 1 business day)

If escalation is needed, email email James Hooper at jhooper@quonticbank.com with contact details to include loan officer information. **Advise the customer that you will escalate to a Senior Manager that will ensure they are contacted within one hour.**

Accounting/Invoices/Billing:

Step 1: **Warm** transfer Ruben Felix X9737

Step 2: If no answer, take a message and TAT for callback would be 1 business day. Email rfelix@quonticbank.com and apinvoices@quonticbank.com/accounting@quonticbank.com with contact information and question(s)

First Homes Club/ grants: email with **Subject Line First Home Club/Grants** send to James Hooper jhooper@quonticbank.com with name, phone number, email address, question(s)

Reverse Mortgage/ HECM: Not available currently

If escalation is needed, email James Hooper jhooper@quonticbank.com.
Send caller details and issue. Advise the caller that TAT is 1-3 business days.

Loan Payoffs:

Step 1: advise caller to please email payoff@quonticbank.com

Step 2: if they insist on speaking with someone, transfer x892 Loan Admin. No answer Bianca x873, or Shafin x930, Kyepher x5892

Step 3: Escalate to Ben Fisher x4010

If still no answer, explain experiencing high volume of calls, take a message and TAT for callback would be 1 business day – send message to service@quonticbank.com

Loan Deferments:

Step 1: Warm Transfer to x892. No answer Clara x4077, Ben x4010, Kyepher x5892

Step 2: If no answer, explain experiencing high volume of calls, take a message and TAT for callback would be 1 business day – send message to service@quonticbank.com

Closing confirmation:

Step 1: Warm transfer to Andrea Hernandez x5874

Step 2: If no answer, explain experiencing high volume of calls, take a message and TAT for callback would be 1 business day. Email closing@quonticbank.com with contact information, loan/application number or property address

Step 3: If insists on speaking to someone, URGENT, call Andrea Hernandez x5874 email ahernandez@quonticbank.com **Subject line: URGENT CALLER NAME**, email contact details and issue

Appraisals:

Step 1: Terri Nichols x2215

Step 2: If no answer, explain experiencing high volume of calls, take a message and TAT for callback would be 1 business day. Email appraisal@quonticbank.com with contact information, loan/application number or property address

Wholesale/ Investor Program:

Step 1: Warm transfer to James Hooper x5878

Step 2: If no answer, explain experiencing high volume of calls, take a message and TAT for callback would be 1 business day. Email jhooper@quonticbank.com with contact information and question(s)

Encompass Support:

Step 1: Warm transfer Ryan Wong x0837 (check after 6/18/23 for update) MLS support group line and provide 888-631-6012 if disconnected while during warm transfer

Step 2: If no answer, explain experiencing high volume of calls, take a message and TAT for callback would be 1 business day. Email MLS@quonticbank.com with contact information and question(s)

Existing PPP Loans: WARM TRANSFER 800-908-6600, press 1

IT – next page

IT:

Step 1: Warm transfer to IT Department x6008

Step 2: If no answer, have caller email IT@quonticbank.com with contact information and question(s) which will generate a ticket

Invoices/Billing: Ruben Felix x9737

Step 1: Warm transfer X9737 Ruben

Step 2: If no answer, explain experiencing high volume of calls, take a message and TAT for callback would be 1-2 business day. Email rfelix@quonticbank.com and apinvoices@quonticbank.com with contact information and question(s)

HR/Employment Verification:

Step 1: Advise caller to email HR@quonticbank.com for all questions/concerns or we can email HR for them with contact details and issue/question

Legal Department:

Only Option: Advise caller to email legal@quonticbank.com with contact information and question/concern

Marketing: 9/9/2022 Per John Maas email marketing@quonticbank.com with callback information

Chinese Translation:

Mortgage-5/18/2023 no one available but they find someone to assist:

Step 1: Warm transfer to x892 Loan Admin

Step 2: If no answer, explain experiencing high volume of calls, take a message and TAT for callback would be 1 business day. Email service@quonticbank.com with contact information and question(s)
Digital Bank—no one available

Spanish Translation:

Mortgage:

Step 1: Warm transfer to x892 Loan Admin

Step 2: If no answer, explain experiencing high volume of calls, take a message and TAT for callback would be 1 business day. Email service@quonticbank.com with contact information and question(s)
Digital Bank:

Step 1: Warm transfer Cynthia Chocolatl x5896

Step 2: If no answer, explain experiencing high volume of calls, take a message and TAT for callback would be 1 business day. Email customerservice@quonticbank.com with contact information and question(s)

Steve Schnall

Rob Russell:

Step 1: **Warm** transfer to x4054 Receptionists

George Lazaridis:

Step 1: Transfer to x4054 Receptionists

Step 2: If no answer, explain experiencing high volume of calls, take a message and TAT for callback would be 1 business day. Email glazaridis@quonticbank.com with contact information and question(s)