SELECTED TRANSFER SERVICES

HELPFUL TIPS FOR SELECTED TRANSFER SERVICES AGENTS:

Good Communication and Attention to Detail are the Keys to Successful Transfers and Satisfied Client Families

STARTING OFF ON THE RIGHT FOOT

Even with good service, solid products and best practices, you still need strong business relationships to succeed. In the case of a transfer request, from the moment a call comes in until the deceased is received at the intended location, success largely hinges on how well the transferring and receiving firms communicate and work together. Some key points to consider when working with another firm include:

- **Written and oral communication** are just as important as utilizing good follow-up and follow-through skills. No detail or arrangement should be left to chance as there are plenty of opportunities for misunderstandings and errors. And, don't forget the client family. It is equally important to keep them informed and consider their needs as well.
- It is important to remember that each firm must adhere to local, state and federal rules and regulations that may differ significantly. Both transferring and receiving firms should promptly inform each other of all required documentation and work cooperatively to **make sure that all paperwork and proper documentation is accurate, timely and complete.**
- **Planning and attention to detail** also are key to success. Making sure that your firm has procedures in place to handle all of the details goes a long way towards ensuring that the transfer goes well for both the transferring and receiving firms, and, in turn, for the client family being served.
- For firms who have signed up to become designated Selected Transfer Services Agents, it is important to **make sure that your firm understands and is familiar with the following documents** (available in your Agent Enrollment Booklet and for download from *www.selectedfuneralhomes.org/STS-Resources*)
    - Agent Terms and Conditions
    - Guidelines When Transferring Human Remains
    - Guidelines For Trade Embalming
    - Guidelines For Trade Cremations

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STAFF TRAINING: BEING PREPARED FOR EACH STEP IN THE PROCESS

Is your firm prepared to handle a transfer call when one comes in? Staff training is a key factor in ensuring success and minimizing associated risks. Agents should review, discuss and consider the following:

- Does your firm have an established transfer process or protocol? If so, is it written down, easily accessible and understood?
- What level of transfer experience does your firm's key contact(s) possess? Have they been involved in making transfer arrangements before? Do they need additional training?
- Is your staff informed about the discount your firm has decided to offer Selected firms calling about your transfer-related services? Agents agree to offer Selected firms a minimum discount of at least 10 percent reduction off of their standard transfer-related pricing. (Visit *www.selectedfuneralhomes.org/STS-Resources* for Agent Terms and Conditions.)
- What forms/paperwork does you firm need in order to comply with local, state, federal and—if required—international regulations? (Visit *www.selectedfuneralhomes.org/STS-Resources* for Sample Documents you can refer to or use.)

HELPFUL THINGS TO REMEMBER WHEN MAKING ARRANGEMENTS

Whether you are the transferring or receiving firm, it is good practice to cover all of the details at each level of the process. The following list is not intended to be exhaustive but rather to remind firms of the many particulars that go into arranging a transfer.

FIRST THINGS FIRST

- Always identify your firm as a member of Selected Independent Funeral Homes.
- Document the names of all people you are working with.
- Identify, understand and communicate who is doing what and what information and/or documentation will be needed before, during and after the transfer process.

WHAT ABOUT THE CLIENT FAMILY?

- Do you have all of the family's information?
- Who is keeping the family informed? Do they know how to get in touch with you?
- Has the next of kin or designated person released custody and authorized the shipment in writing?
- What are the family's wishes? Are there cost and/or scheduling considerations? Do they have any special requests and have you addressed those?
- Does the family have questions? Have you answered them all or promised to get back to them with an answer?

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SCHEDULING WITH THE AIRLINES

- Where are you transferring to? Is it domestic or international?
- If international, do you know what that nation's requirements are? (Visit the U.S. Department of State's website at *www.state.gov* for helpful information.)
- Who sets up the flight, when does the flight leave and when does it arrive?
- What are the minimum requirements of the airlines being used?

SHIPPING PREPARATION

- Who is picking up the deceased?
- Who is preparing the body? Who is doing the embalming? (Firms may use the program's suggested Embalming Report, found at *www.selectedfuneralhomes.org/STS-Resources*, or develop their own.)
- Are there any issues or concerns that need to be communicated to the receiving firm or to the family?
- What are your state's regulations? What does the state you are shipping to require?
- What type of shipping container is needed or being used?

CREMATION CONSIDERATIONS

- Are the remains being cremated? Who is doing the cremation? Has the proper identification and documentation been completed?
- Do you know or can reference the U.S. Postal Service requirements for shipping cremated remains?
- Who is delivering and/or receiving the remains to the desired location? How are the cremated remains being identified and stored
- Has the family been informed of the process and their options?

REQUIRED PAPERWORK

- Do you need a signed certificate of death, burial permit and/or burial transit removal permit?
- Do you need a health office and/or physician certificate to accompany the remains?
- What forms/paperwork does you firm need in order to comply with local, state, federal agencies and, if required, international regulations?
- Has the family completed all of their required forms?

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COMMUNICATION STRATEGIES

- Have you shared all of the details regardless of whether you are the receiving or transferring firm?
- When will follow-up occur? Who is responsible for that?
- Has the family been kept in the loop? Has the family been informed of any issues?

PROCESS EVALUATION

- Did you evaluate the process? What worked, what didn't, what did we learn? (Participants may use the program's suggested Service Satisfaction Survey, found at *www.selectedfuneralhomes.org/STS-Resources*, or use their own.)
- Would you recommend the firm you worked with? Would they recommend your firm?

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