

**USA Services Tier I - Telephone  
Agency/Program Information Template Part II**

<i>Call Handling</i>	<i>Date Needed</i>	<i>Date Received</i>	<i>Definition</i>
<i>Kick Off Meeting</i>	To be conducted approximately 60 days before the desired "Go Live" date.		Joint meeting or conference call between USA Services, Agency and Aspen. Purpose: > Formal introduction of key contacts. > To review and discuss all "content" requirements listed in this document. > To discuss established timelines.
<i>Content Identification</i>	Please provide approximately 45 days prior to the "Go Live" date.		Identify, define, and provide content and resource material to be used for answering inquiries. If known, provide FAQ's and answers.
<i>Standard Call Flow</i>	Please provide approximately 45 days prior to the "Go Live" date.		Provide scripting for standard greeting, standard closing, and indicate which demographics must be collected (e.g. ZIP code, language, gender, source, etc.).
<i>Special Call Management Processes</i>	Please provide approximately 45 days prior to the "Go Live" date.		Required processes or escalation procedures for complaint handling, media calls, crisis calls, Congressional calls, Tier II support and other special call types.
<i>Tier II Process</i>	Please provide approximately 20 days prior to the "Go Live" date.		Please provide: > The Tier II telephone number > Hours of Tier II availability > Transfer procedures > Process for any business hour that Tier II is not available (e.g. IVR at Tier II, call back form, voicemail at Tier II)
<i>Quality Assurance Meeting</i>	To be conducted approximately 20 days prior to the "Go Live" date.		Joint conference call between USA Services, Agency, and Aspen. Purpose: > To review/discuss draft of content knowledge base designed for Tier I inquiry handling. > To clarify, refine, and confirm response protocol. > To identify additional sources of content, if necessary. > To discuss options for ongoing quality processes, including: joint calibration, ongoing agency feedback, and sharing of quality feedback from customers.
<i>Telecommunications</i>	<i>Date Needed</i>	<i>Date Received</i>	
<i>Toll-Free Number</i>			This section is only for those customers who have an existing toll-free number. Is the toll-free number live (operating) now? On what network (e.g. MCI, A,T&T) does it reside? Is there a network level IVR for this number? USA Services will help you work with your network contact (at the phone company) to redirect the phone number itself and the billing to USA Services.

<p><b><i>Interactive Voice Response (IVR) Requirements Meeting</i></b></p>	<p>To be conducted approximately 25 days prior to the "Go Live" date.</p>		<p>A conference call or meeting to discuss construction of business hours IVR and non-business hours IVR. Topics will include and are needed in English, Spanish or both as required:</p> <ul style="list-style-type: none"> <li>&gt; Greeting message.</li> <li>&gt; Topics/call flow.</li> <li>&gt; On hold message.</li> <li>&gt; After hours voicemail option.</li> </ul>
<b><i>Training</i></b>		<b><i>Definition</i></b>	
<p><b><i>Staff Training</i></b></p>	<p>To be conducted approximately 10 days prior to the "Go Live" date.</p>		<p>Staff training can be conducted by Aspen, the Agency, or jointly. Even if the agency selects Aspen as the training resource, it is preferred, but optional, that the Agency visit the staff to deliver a program overview.</p>
<b><i>Order Taking and Fulfillment</i></b>		<b><i>Define Requirements</i></b>	
<p><b><i>Order Processing</i></b></p>	<p>Please provide approximately 45 days prior to the "Go Live" date.</p>		<p>Define order processing requirements including if this service will be needed in English, Spanish or both.</p> <p>Examples:</p> <ul style="list-style-type: none"> <li>*How many items can be ordered?</li> <li>*Are the items free, for fee, or both?</li> <li>*How are publications promoted? Is there a catalog, internet, etc?</li> <li>*If there is a catalog, is there an expiration date?</li> <li>*Are there any special circumstances where out of the ordinary handling procedures should be drafted?</li> <li>*Are there special handling requirements for any population?</li> <li>*Are there priority handling options such as overnight shipping?</li> <li>*Process for handling complaints</li> <li>*Shipping and Handling costs</li> <li>*How does the customer pay?</li> <li>*What type of credit card(s)?</li> <li>*What is the delivery time?</li> <li>*What customer information is collected?</li> <li>*Do you want an order number?</li> <li>*Is there a stock status: available, temporarily unavailable, out of stock not to be reordered?</li> <li>*Where will the orders be transmitted?</li> <li>*How will the orders be transmitted (electronically via e-mail, FTP, etc.) and how often?</li> <li>*If the orders are transmitted electronically to the Pueblo FCIC Distribution Facility, will they be part of the CIC order file? (See USA Services employee for more details.)</li> </ul>