Sales Support Operational Procedures

V3.6 April 2023

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Sales Support

Sales Support (also referred to as Agent Relations) is a support team dedicated to assisting both Independent Sales Operators (ISO) and sales representatives for various lifeline providers including Assist Wireless, enTouch Wireless and Safetynet Wireless.

The purpose of the group is to provide a variety of back office support queries primarily initiated by customers. These include, but are not limited to, account maintenance, troubleshooting, account and billing research. Our main goal is to ensure that all customer-facing agents have the necessary support to deliver great customer service experience to all customers.

This support team operates out of the Dallas Corporate Office under the supervision of the Operations Department. The Sales Support team serves all Independent Sales Operators (ISO) and Store Employees in the following states:

Assist Wireless

- Arkansas
- Maryland
- Missouri
- Oklahoma

enTouch Wireless

- Arizona
- Arkansas
- California
- Colorado
- Florida
- Georgia
- Hawaii
- Michigan
- Minnesota
- Mississippi
- Missouri
- Nebraska
- Nevada
- New York
- Idaho
- Indiana
- Iowa
- Kansas
- Kentucky
- Louisiana
- Maryland
- North Dakota
- Ohio
- Oklahoma
- Oregon
- Pennsylvania
- Puerto Rico
- Rhode Island
- South Carolina
- South Dakota
- Tennessee
- Texas
- Utah
- Washington
- West Virginia
- Wisconsin
- Wyoming

Responsibilities

Sales Support is responsible for the back office support to all agents in the field. We are the first point of contact when agents have questions, requests, or concerns that cannot be resolved in the field.

Agents will submit their queries by calling into the Agent Relations 800 number, via chat and email.

Email requests will be processed on a first-come first-served basis. The turnaround time for the email to be processed can take up to 15 minutes depending on the queue volume.

When the agent calls directly into the phone queue, the request will be processed over the phone at the time of call.

When the agent chats in via the chat queue, the request will be processed real time via chat.

Team Evaluation

Sales Support is committed to providing excellent service in a professional and timely manner to all of our agents in the field and to other departments.

The team is evaluated on a weekly basis to ensure the level of service provided meets KPIs (key performance indicators) and company standards based on the following criteria:

ASA (Average Speed of Answer) KPI: Below 120 seconds . This is the time that measures how long it takes to answer calls during a normal business day. Sales Support is committed to answer all calls within the first 120 seconds after the call goes through the welcome IVR.

Average Handling Time. The average handling time refers to the length of the call from the moment it is received to the moment it is released by the caller. Agent Relations strives to maintain an average handling time of 5 minutes. This ensures all problems are addressed in a timely fashion and agents are able to get back to serving the customers in-store.

Abandon Percentage - KPI: Below 20% This refers to the amount of queued calls that disconnect before reaching an agent. We strive to have less than 20% of calls abandoned.

Call Dispositions - KPI: 0% No Disposition A call disposition describes the outcome or reason for a call. By tracking dispositions, we can gain valuable data that can be used to optimize our processes and diagnose areas of improvement.

Call Etiquette. All Sales Support agents are trained to provide a professional and pleasant experience to all of our callers. To ensure that all callers are being treated with consistency and respect, all calls are monitored, recorded, and evaluated by the following principles:

- Call opening
- Tone of voice
- Information clarity
- Response time
- Caller rapport
- Call closure

Total Decisions Rendered. This refers to the total number of orders worked. This is measured hourly and differs from representatives that are taking phone calls and representatives whose main focus is real time review. Representatives who are assigned to take phone calls are expected to review between 9 and 12 orders per hour. Representatives who are assigned to only review orders are expected to review between 12 and 15 orders per hour.

Average Audit Time The average audit time refers to the time it takes a representative to review a real time order. Sales Support is committed to review orders in less than 3 minutes.

Correctable Denials A correctable denial is when an order that was supposed to be denied is approved. We strive to have less than 30 correctable denials a month as a team.

Scripts

Call Opening Script & Verification Process

The Federal Communications Commission (or FCC) will require wireless providers to refine their customer authentication procedures. As part of this process, we are unable to ask callers for personal identifying information such as their **name, date of birth, last four digits of their SSN or email, billing or service address.**

Call Opening Script & Verification Process

Upon answering a call we must verify we are speaking to the account holder and verify the account PIN.

Note for all customers except CA and TX: *If the caller doesn't know their account number, they can contact NLAD and ask for their Subscriber ID (SUB ID). We can use the Subscriber ID to locate the account in Fusion.*

Scripts

- Opening
    1. *"Thank you for calling (Company Name), My name is (Agent Name). May I please have your (Company) account number?"*
        - If the customer provides the account number, proceed to step 2
        - If the customer provides their phone number, that is okay, you can use it to locate their account in Fusion but you CANNOT ask for it.
        - If the customer does not know their account number, we can ask if they are calling from their device and use the number displayed on the caller ID to look up their account.
            - *"Unfortunately, We would need to speak with the account holder to provide any information. Your account number is listed on your monthly statement. If you have one available you can see the account number on the top right corner of the invoice. If you do not have an invoice we can email or mail one to your address on file."*
                - Do not provide the address on file. If the customer asks what address is on file use the following script to inform them we cannot disclose that information.
                    - *"Unfortunately we cannot disclose that information. The address on file is what was used upon sign up."*
    2. *"May I ask who I am speaking with?"*
        - If the caller provides the correct name listed in Fusion, proceed to step 3.

- If the caller provides a name other than what is listed in Fusion or not their full name, provide the following script:
    - *"Unfortunately the information provided does not match our records. We would need to speak with the account holder to provide any information."*
        - If the customer fails to provide their full name repeatedly, you will need to continue repeating the above script.

3. *"Thank you for that information. Can you please provide your account PIN."*
    - If the customer provides the correct PIN, proceed to step 4.
    - If the caller provides the correct PIN but it is not a secure PIN such as 0000 or 1111, please ask the customer to set a more secure PIN using the following script:
        - *Thank you, your current PIN does not meet the recommended security standards. Would you like to establish a more secure PIN for your account?*
            - If yes, proceed with updating the customer's PIN.
            - If not, continue to step 4.
    - If the customer is unable to verify their PIN, or provides an incorrect PIN, **WE MAY** only assist them with the following**:**
        - Take Payments
        - Purchase Top Ups
        - Provide Troubleshooting Steps
    - If the customer is unable to verify their PIN, or provides an incorrect PIN, we **CANNOT** do the following:
        - Phone Number Changes
        - SIM Swaps
        - Device Swaps
        - Provide Call Log Details
            - Usage including the amount and type of services used, including the time, date, duration, and destination number of calls.
        - Add Authorized Users
        - Billing Information
            - Billing information related to the services used, such as current charges and billing records
        - Change and/or Provide Billing/Service Address Information
        - Submit Dropship Requests
    - If the customer is unable to verify their PIN, or provides an incorrect PIN and asks how they are able to update their PIN or would like one of the above transactions processed, they can request to have a temporary PIN sent to their email or mailing address on file.

- *“We can send you a temporary PIN to your email or mailing address on file. Once you receive it, you will need to give us a call back. We will then help you set a new PIN and assist you further.“*
    - Do not provide the email address or mailing address on file. If the customer does not have an email on file or has an invalid email such as “*none@none.com*” we will need to send the temporary PIN via mail. If the customer asks what the email or mailing address they have on file is, read the following script:
        - *“Unfortunately we cannot disclose that information. The email and mailing address on file is what was given to us by you upon sign up.”*

4. *“Thank you, how may I assist you today?”*

To email or mail a temporary PIN to the customer:

- Open a ticket with the Tier2 team and provide the customer’s account number and whether they would like to receive the PIN via email or mail. The temporary PIN will be sent by the Senior Sales Support Team within 24-48 business hours.

Callback Number script

“Is there a good phone number where we can reach you in case our call is disconnected?”

Hold Script

Callers should not be on hold for longer than **two minutes**. If they have been on hold for two minutes, you need to check in with the caller

"I apologize, but I need to put you on a brief hold so that I can look into this for you."

“Thank you for your patience, I apologize for the long hold. I am still working on your account and should be done shortly. Do you mind if I place your call back on hold?”

Return to the call Script

Always make sure you are summarizing their issues when returning to the call and then offer the resolution.

"[Mr/Ms Last Name]? Thank you for holding."

Transferring Script -

“Before I transfer you to [department name], is there anything else I can assist you with? (if caller says no) Thank you for calling Assist Wireless, I’m transferring you now.”

Closing Script

"Is there anything else I can assist you with? (if caller says no) Great! Thank you for calling Assist Wireless, have a great day!"

Company Department Information

Sales Support / Agent Relations

Assist Wireless

Phone: 855-420-2445
Chat: http://awagentdashboard.com/chat

Hours of Operation
Monday - Saturday 8am-8pm CST
Sunday - 10am-8pm CST
enTouch Wireless

enTouch Wireless

Phone: 888-471-1324 Option 1
Chat: https://entouchwireless.zendesk.com/chat

Hours of Operation
Monday-Friday - 8am-10pm CST
Saturday - 8am-9pm CST
Sunday - 10am-8pm CST

Compliance Department

Questions regarding online/in-person enrollments, account updates are processed by the Compliance Department. If an agent is calling in about a denied CGM order, they would be transferred to the Compliance Department.

Assist Wireless

Phone: 855-441-6594
Chat: http://awagentdashboard.com/chat

Hours of Operation
Monday - Saturday 8am-8pm CST
Sunday - 10am-8pm CST

enTouch Wireless
Phone: 888-471-1324 Option 3
Chat: https://entouchwireless.zendesk.com/chat

Hours of Operation
Monday-Friday - 8am-11pm CST
Saturday - 8am-9pm CST
Sunday - 10am-8pm CST

Web Enrollment Support Group
See Web Enrollment Support

Web Enrollment Support Group is a support team dedicated to assisting customers who are calling in with questions about online enrollments or the status of their online application.

Assist Wireless
Phone: 888-295-7937

Hours of Operation
Monday - Friday 10am - 8pm CST
Saturday and Sunday - Closed

enTouch Wireless
Phone: 888-594-0579

Hours of Operation
Monday - Friday 10am - 8pm CST
Saturday and Sunday - Closed

Retention
All disconnect or phone discount requests are processed through the Retention Department.

Assist Wireless
Phone: 844-529-9370
Chat: http://awagentdashboard.com/chat

Hours of Operation
Monday - Friday 10am-6pm CST
Saturday and Sunday - Closed

enTouch Wireless
Phone: 888-707-1152

Hours of Operation
Monday - Friday 10am-10pm CST
Saturday and Sunday - Closed

Retention for legacy enTouch Customers
Phone: 833-940-4890

Hours of Operation
Monday - Friday 10am-10pm CST
Saturday and Sunday - Closed

Safetynet Wireless
Phone: 888-881-0077

Hours of Operation
Monday - Friday 10am-10pm CST
Saturday and Sunday - Closed

Repair Center
Escalated device troubleshooting issues that cannot be resolved by the Customer Service team are transferred to the Repair Center queue. These requests are resolved by the Sales Support / Agent Relations team.

Assist Wireless
Phone: 855-297-1172
Chat: http://awagentdashboard.com/chat

Hours of Operation
Monday - Saturday 8am-8pm CST
Sunday - 10am-8pm CST

enTouch Wireless
Phone: 888-471-1324 Option 2
Chat: https://entouchwireless.zendesk.com/chat

Hours of Operation

Monday-Friday - 8am-10pm CST
Saturday - 8am-9pm CST
Sunday - 10am-8pm CST

Safetynet Wireless

Phone: 844-344-4027

Hours of Operation
Monday-Friday - 8am-10pm CST
Saturday - 8am-9pm CST
Sunday - 10am-8pm CST

Customer Service

Customer service is a support team dedicated to assisting Assist Wireless and enTouch Wireless customers. The purpose of the group is to provide support to our customers which includes, but is not limited to, account maintenance, device troubleshooting, account and billing research. Our main goal is to ensure that all Customer Service Representatives (CSRs) have the necessary support to deliver great customer service experience to all customers.

Assist Wireless

Phone: 855-392-7747

Hours of Operation
Monday - Friday 10am-6pm CST
Saturday and Sunday - Closed

enTouch Wireless

Phone: 866-488-8719

Hours of Operation
Monday-Friday 8am-7pm CST
Saturday and Sunday - Closed

Customer Service for legacy enTouch Customers

Phone: 866-488-8719

Hours of Operation
Monday-Friday 8am-7pm CST
Saturday and Sunday - Closed

Guard Assure

Guard Assure (GA) is our mobile protection program for Assist Wireless. To process a claim, agents must contact the Guard Assure department below.

Phone: 855-400-0878

Hours of Operation
Monday - Saturday 9am-6pm CST
Sunday - Closed

Inventory

Questions regarding inventory issues that cannot be resolved by Sales Support as well as inventory transfers should be escalated to the inventory department - inventory@viaoneservices.com

Lifeline Support Center - NAV

The Lifeline Support Center (also known as NAV or National Verifier) is in charge of reviewing eligibility documentation submitted to the National Verifier. If an agent submits eligibility documentation for review and the NV rejects it, they will need to call the Lifeline Support center to determine why it was rejected.

Phone: 800-234-9473

Hours of Operation
Monday - Sunday 8am-8pm CST

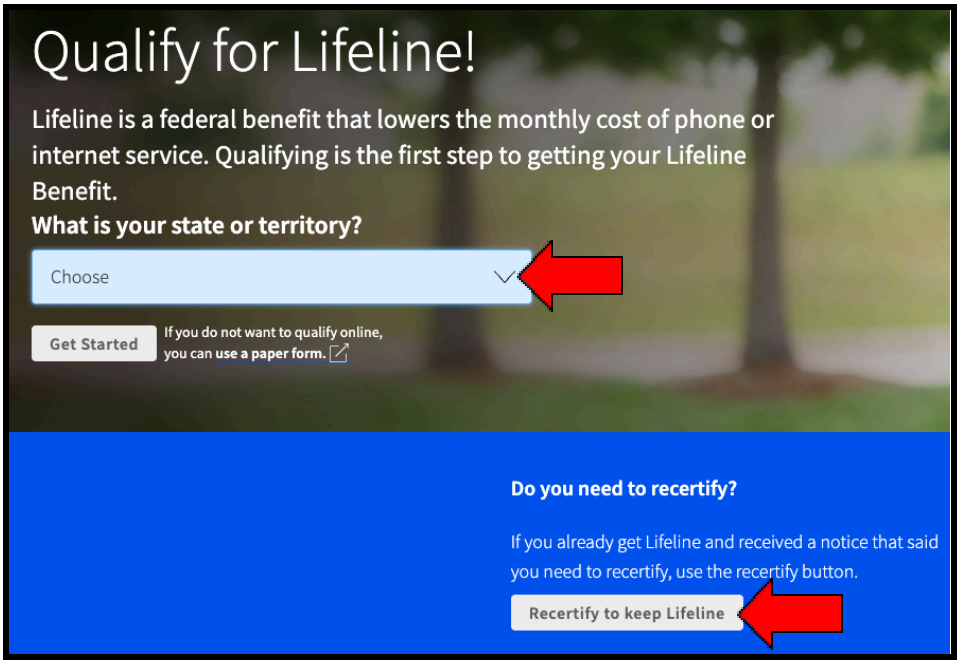
Recertification/Reverification Info

All existing lifeline customers enrolled prior to January 22, 2020 must complete USAC's one-time Reverification process (also known as the National Verifier) to verify continued eligibility for Lifeline service.

Recertification will be handled exclusively through USAC moving forward. The date an existing customer passes USAC's Reverification process at hard launch becomes the customer's new anniversary date.

Customers can go to https://getinternet.gov/apply?id=nv_home to recertify.

- IMPORTANT NOTE: The link to recertify will only work if the customer chooses their state/territory from the drop down list at the top of the page first.



For more information see Recertification Scripts 2024

Media Relations

Do not speak to the media directly.
All requests from the media are to be referred to Media@viaoneservices.com

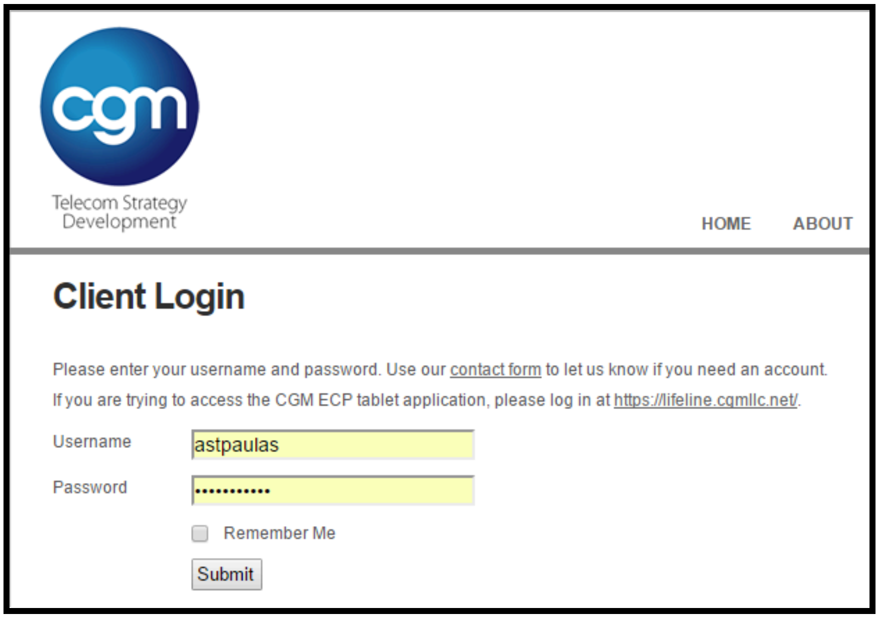
Systems

Sales Support operational duties and ability to troubleshoot any issues rely on the following platforms.

CGM

This software is the current order entry system used. Sales Support uses the back office functions to search all orders, clear orders that were failed in NLAD, and to verify that all information provided by the customer is accurate and complete.

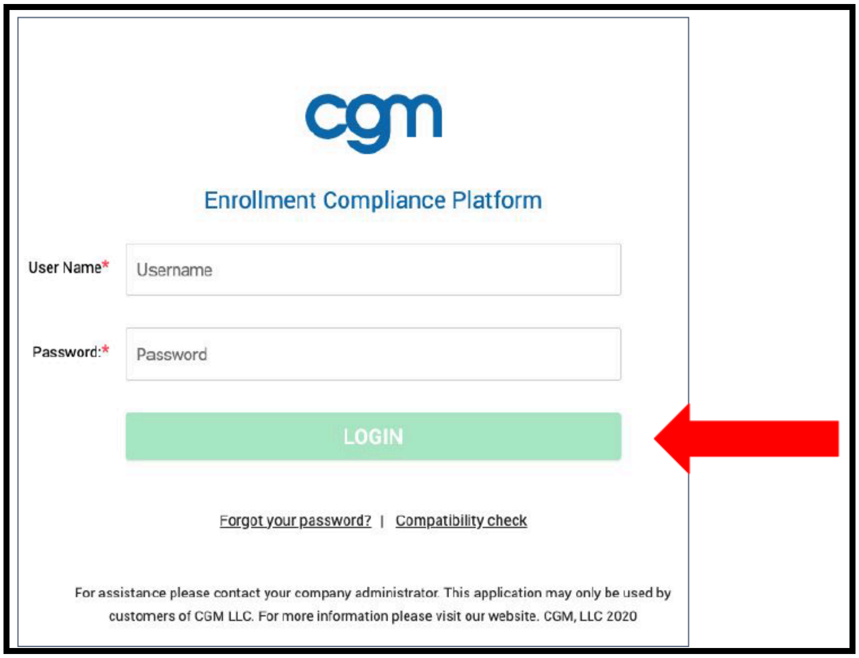
Effective January 22, 2020, Agents will use a USAC-hosted website known as the **National Verifier** (via CGM) to check a customer's eligibility for the Lifeline program, and if needed, submit eligibility documentation to USAC for manual review.



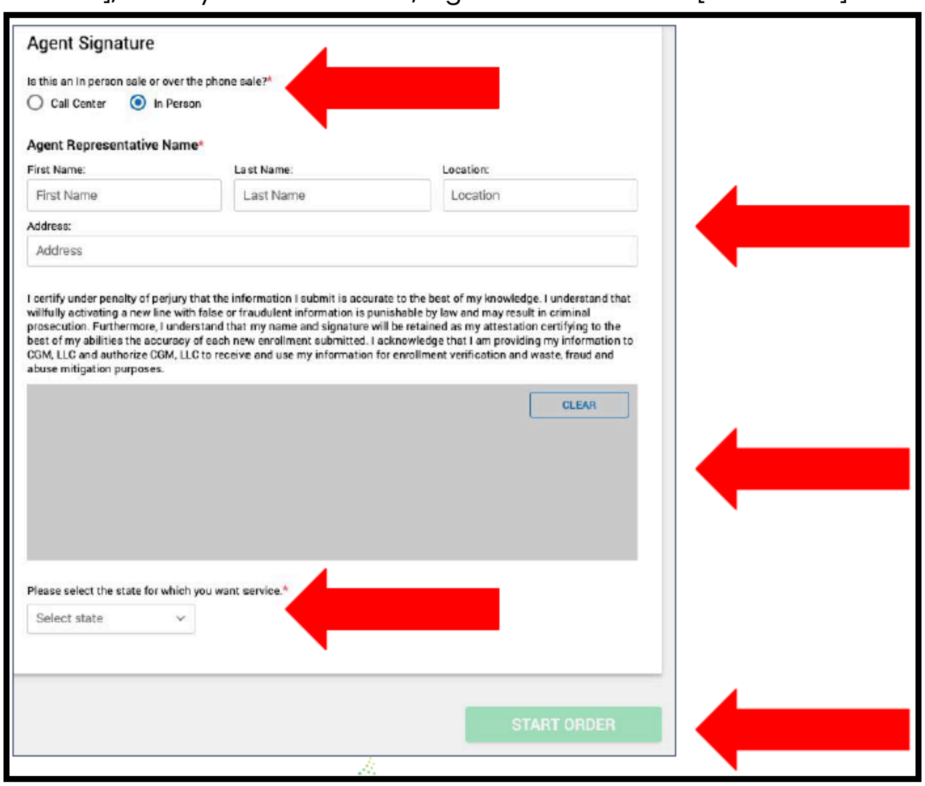
CGM Enrollment Portal

Outlined below is the process field agents follow to enroll new customers.

1. Go to https://app.cgmllc.net/ and enter your Username and Password

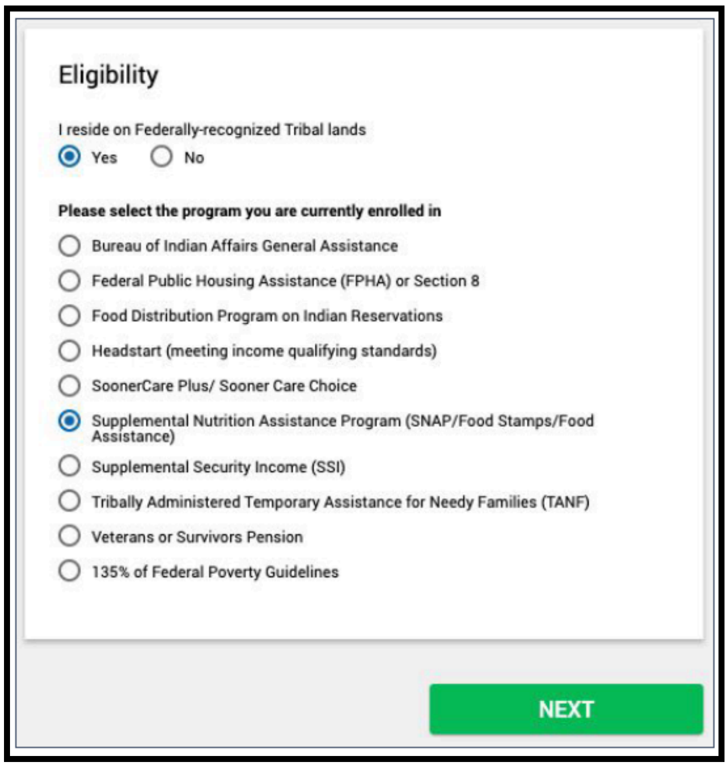


2. Select [In Person], enter your information, signature and select [Oklahoma]

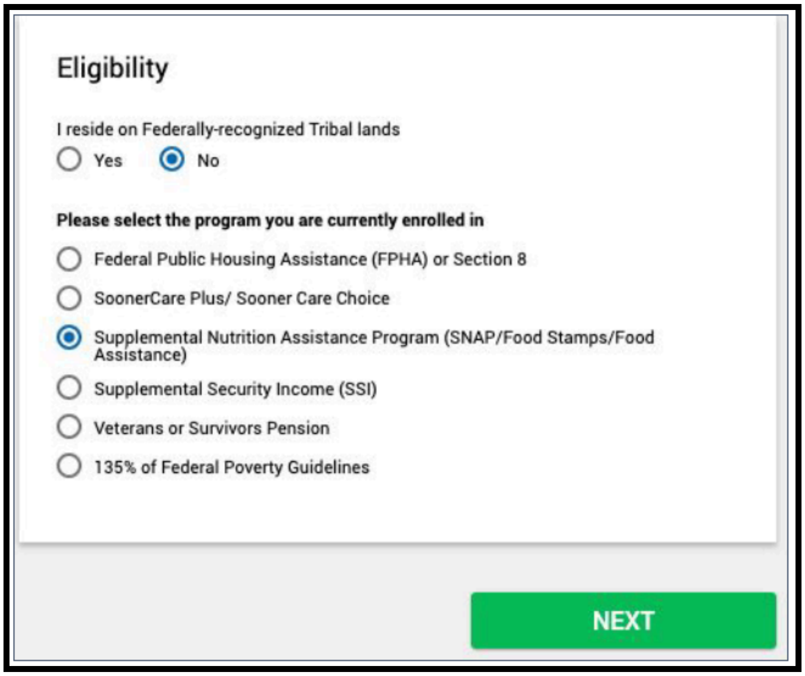


3. Have customer confirm if they reside on Tribal land and select their eligibility program.

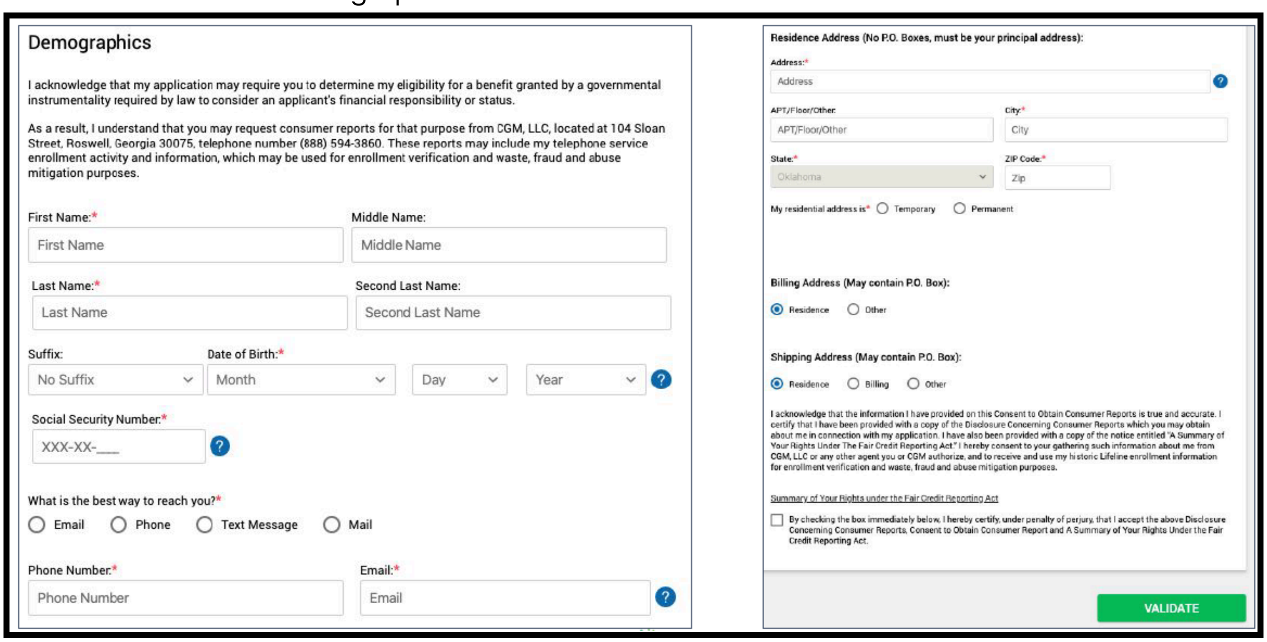
a. Tribal Programs



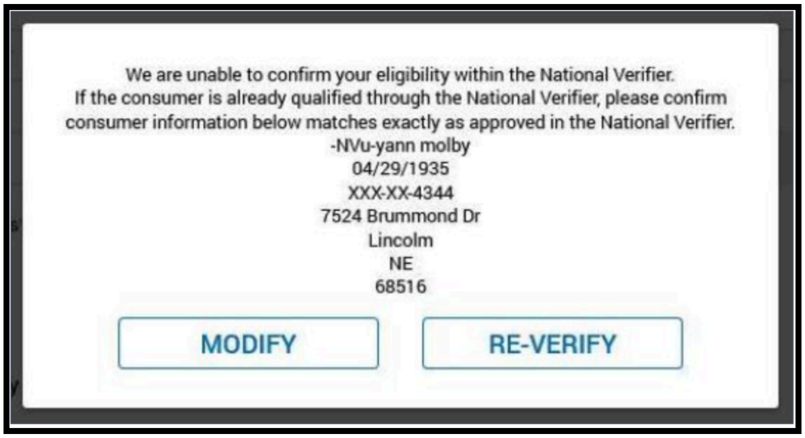
b. Non - Tribal Programs



4. Enter the customer's demographic information.

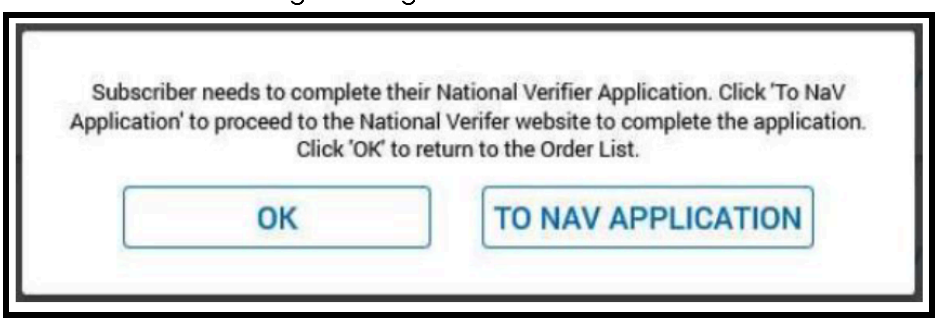


5. After the demographic information has been entered, CGM will check to see if the customer is found by the National Verifier. If the customer is not found, you will receive this message:



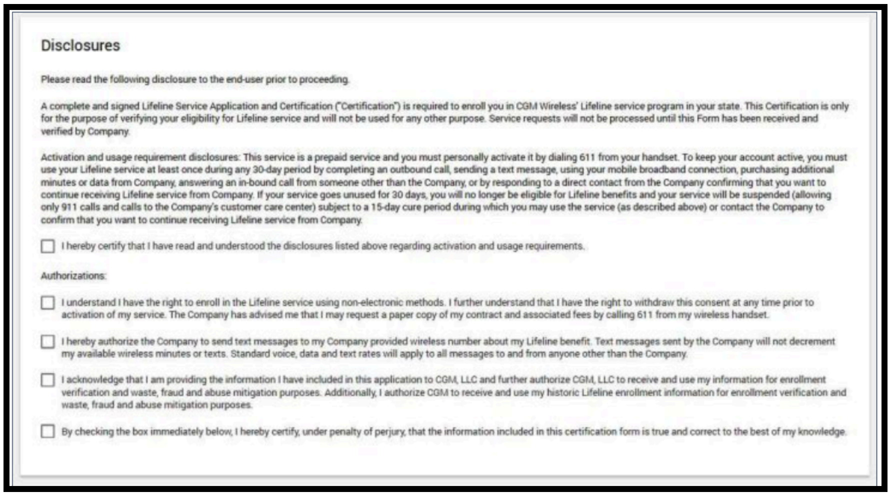
a. If the information listed is incorrect, click [Modify]. If the information is correct, click [Re-Verify] to be directed to the National Verifier.

6. If the customer is found but has not completed their enrollment in the National Verifier, you will receive the following message:



a. Click [OK] to cancel the application and return to the Order List or click [To Nav Application] to be directed to the National Verifier. If you go to the National Verifier, CGM will auto-populate the demographic information so that you will not have to re-enter.

7. Have the customer read the disclosures and check each of the attestations.



Disclosures

Please read the following disclosure to the end-user prior to proceeding.

A complete and signed Lifeline Service Application and Certification ("Certification") is required to enroll you in CGM Wireless' Lifeline service program in your state. This Certification is only for the purpose of verifying your eligibility for Lifeline service and will not be used for any other purpose. Service requests will not be processed until this Form has been received and verified by Company.

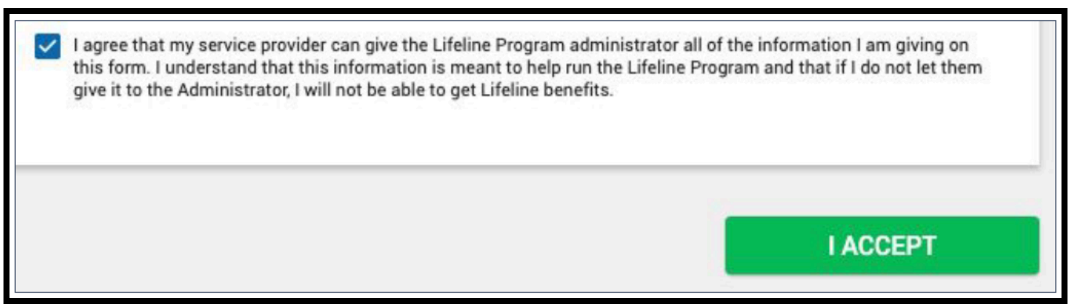
Activation and usage requirement disclosures: This service is a prepaid service and you must personally activate it by dialing 611 from your handset. To keep your account active, you must use your Lifeline service at least once during any 30-day period by completing an outbound call, sending a text message, using your mobile broadband connection, purchasing additional minutes or data from Company, answering an in-bound call from someone other than the Company, or by responding to a direct contact from the Company confirming that you want to continue receiving Lifeline service from Company. If your service goes unused for 30 days, you will no longer be eligible for Lifeline benefits and your service will be suspended (allowing only 911 calls and calls to the Company's customer care center) subject to a 15-day cure period during which you may use the service (as described above) or contact the Company to confirm that you want to continue receiving Lifeline service from Company.

- [ ] I hereby certify that I have read and understood the disclosures listed above regarding activation and usage requirements.

Authorizations:

- [ ] I understand I have the right to enroll in the Lifeline service using non-electronic methods. I further understand that I have the right to withdraw this consent at any time prior to activation of my service. The Company has advised me that I may request a paper copy of my contract and associated fees by calling 611 from my wireless handset.
- [ ] I hereby authorize the Company to send text messages to my Company provided wireless number about my Lifeline benefit. Text messages sent by the Company will not decrement my available wireless minutes or texts. Standard voice, data and text rates will apply to all messages to and from anyone other than the Company.
- [ ] I acknowledge that I am providing the information I have included in this application to CGM, LLC and further authorize CGM, LLC to receive and use my information for enrollment verification and waste, fraud and abuse mitigation purposes. Additionally, I authorize CGM to receive and use my historic Lifeline enrollment information for enrollment verification and waste, fraud and abuse mitigation purposes.
- [ ] By checking the box immediately below, I hereby certify, under penalty of perjury, that the information included in this certification form is true and correct to the best of my knowledge.

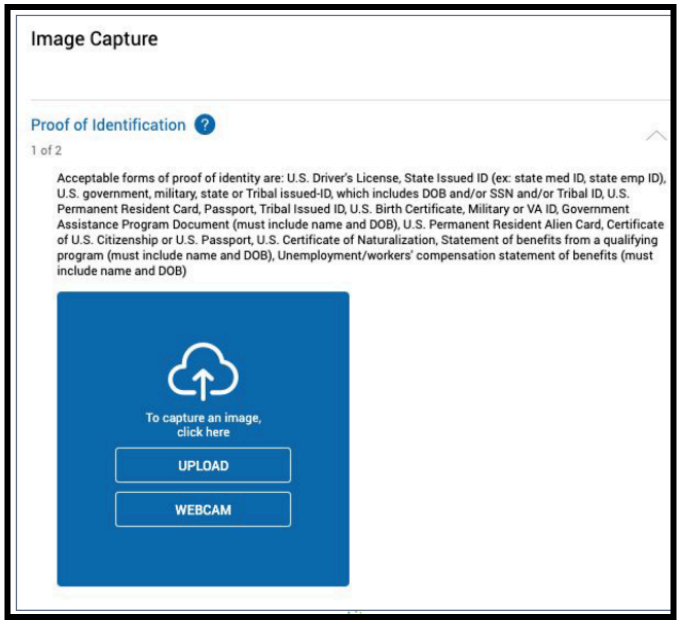
8. Disclosures Continued



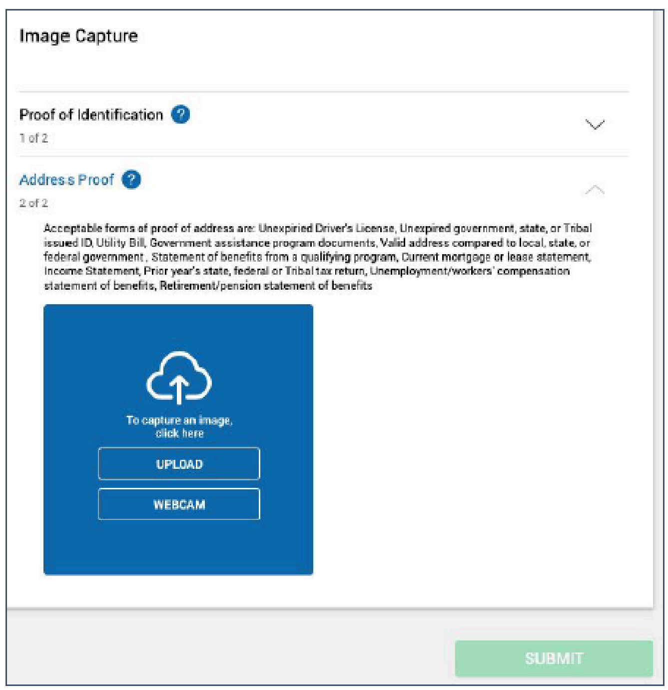
- [x] I agree that my service provider can give the Lifeline Program administrator all of the information I am giving on this form. I understand that this information is meant to help run the Lifeline Program and that if I do not let them give it to the Administrator, I will not be able to get Lifeline benefits.

I ACCEPT

9. Capture Proof of Identification to be reviewed by the Assist Wireless Compliance Department

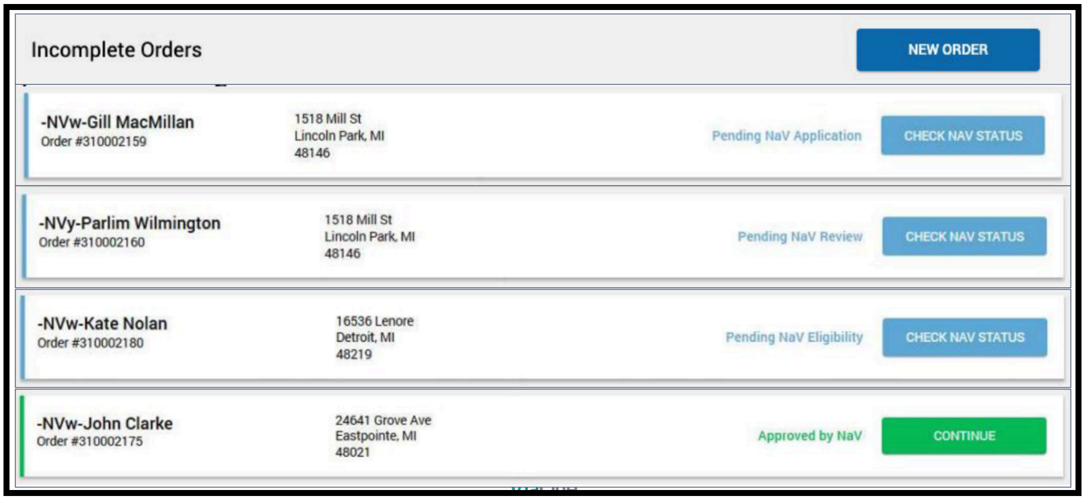


10. Capture Address Proof to be reviewed by the Assist Wireless Compliance Department

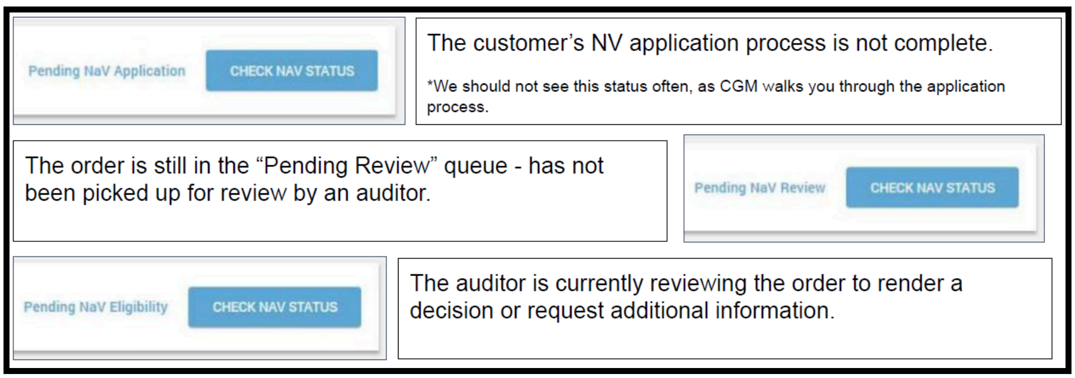


Soft and hard denials from the Assist Wireless Compliance Department will function the same way in CGM as they do today.

11. You will be redirected to the Incomplete Orders Screen

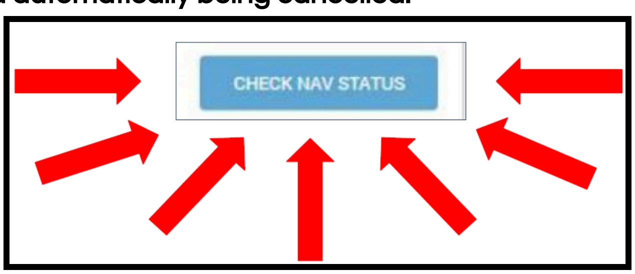


12. Order Statuses



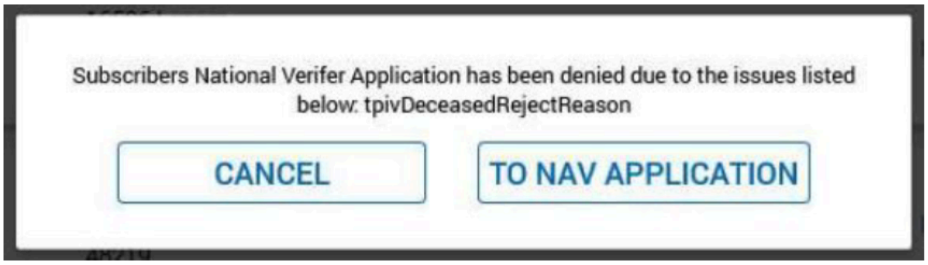
Incomplete orders will remain in the queue in CGM for 1 hour and then will be moved to "Cancel for Inactivity" status. If the order is then approved by the National Verifier, you will have to start a new order in CGM, but the customer should be found in the first NV dip.

13. **IMPORTANT NOTE: You MUST click [CHECK NV STATUS] on your orders to get the most updated status from the National Verifier. Failure to do so will result in your order timing out for inactivity and automatically being cancelled.**



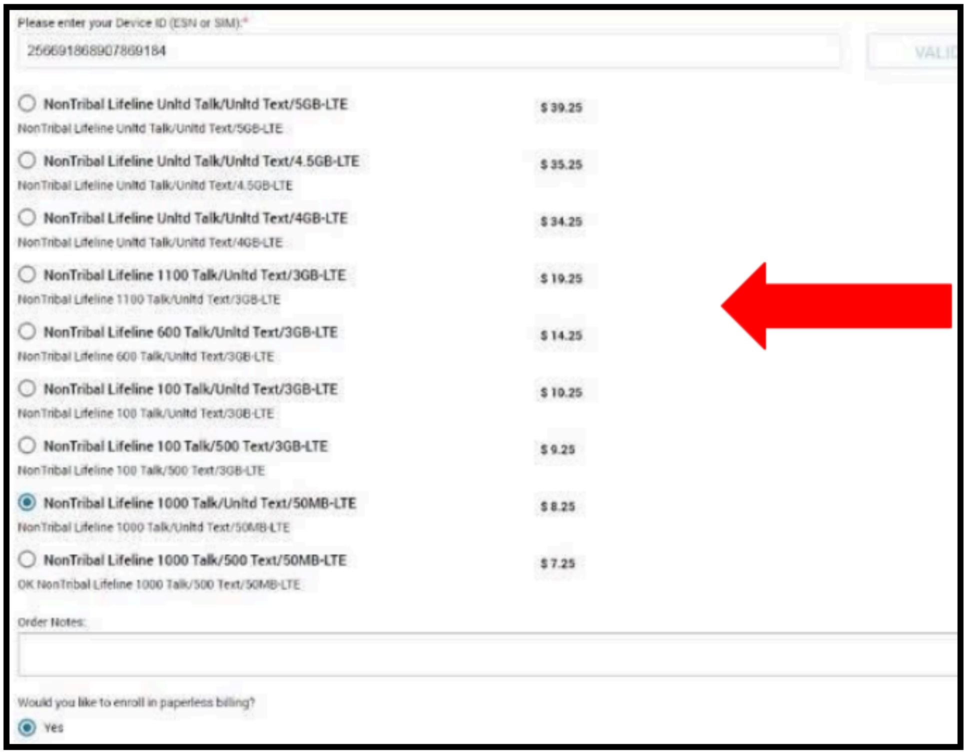
a. Each time you click [Check Nav Status] it is recorded in the order history in CGM. Please do not click this button repeatedly. Clicking once every 3-5 minutes should be a sufficient amount of time to request an update on each order.

14. If the National Verifier rejects the Subscriber Application, the reason will be displayed on the Order List Screen. Click [Cancel] to not proceed with the order or click [To NaV Application] to update the order.

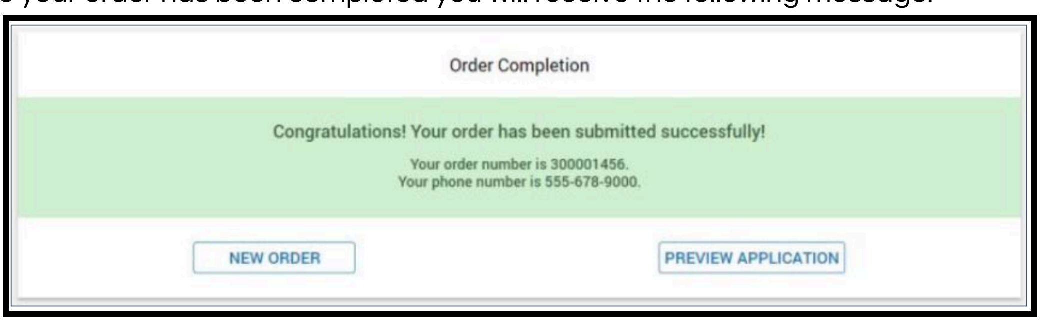


15. If the application is approved by the National Verifier and the Compliance Department, click [Continue] to go to the Service Type screen.

16. Provide customer with plan details and select their desired plan and enter the PIN created by the customer:



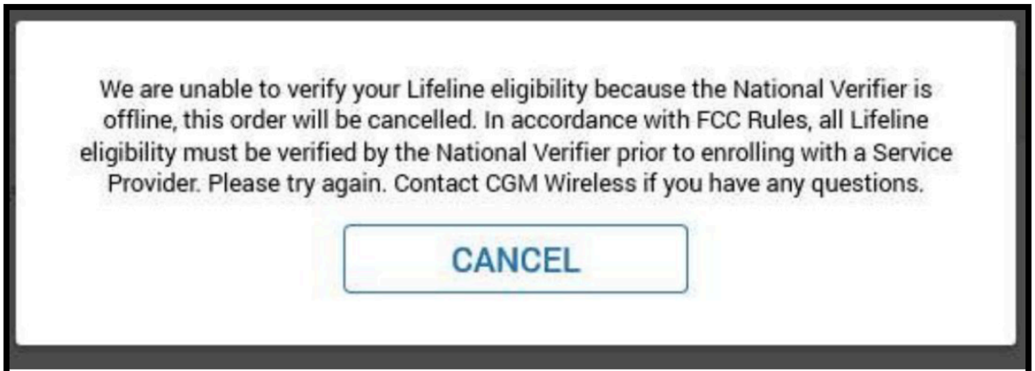
17. Once your order has been completed you will receive the following message:



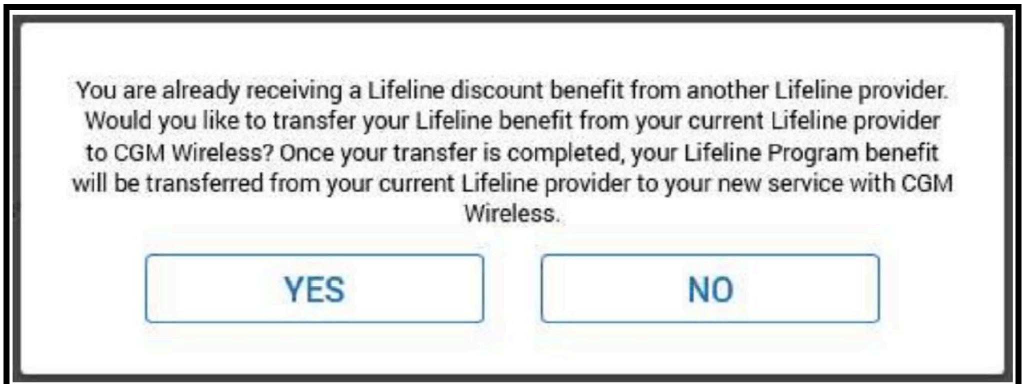
IMPORTANT NOTE (Tribal/Non-Tribal Mapping): In the CGM portal, the customer will still be required to select whether or not they reside on tribal lands, and CGM will still geocode the address to validate. However, the National Verifier will also geocode the address.

Unfortunately, nowhere in the process does National Verifier confirm that they've approved the order as tribal or non-tribal. So if the customer and CGM say they're tribal, but the NV finds them to be non-tribal, the agent will be able to continue through the order process, but on the very last page, the order will fail. Agents need to confirm that they get the "Order Successful" screen before handing a device to a customer. If the order fails, it will be cancelled out. CGM is working with USAC to try to resolve this issue, but we do not have an ETA on a fix.

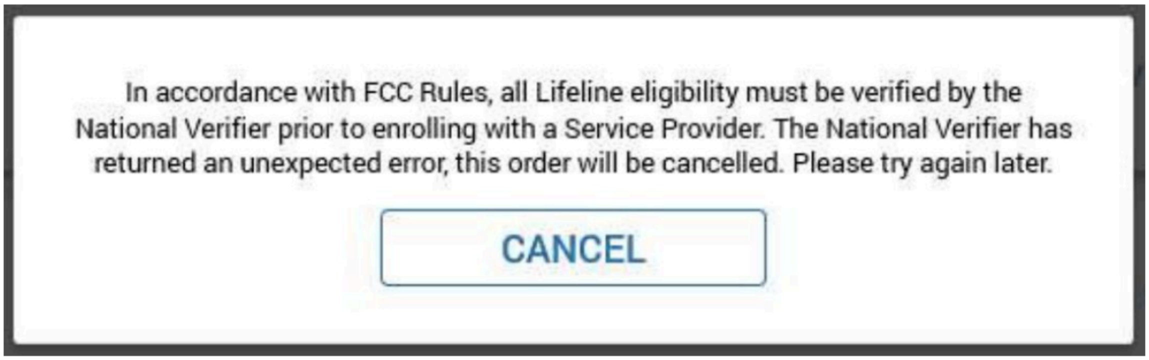
<u>You may receive the following messages in CGM:</u>



Once we are notified that the National Verifier is offline, all updates will be posted to the Agent Dashboard.



This is the same process for Benefit Transfers.



You can attempt to re-run the customer, but there is no guarantee that you will not receive this error.

National Verifier

The Lifeline National Eligibility Verifier (National Verifier) is a centralized system that determines whether subscribers are eligible for Lifeline. USAC manages the National Verifier and its customer service department, the Lifeline Support Center.

As of the hard launch date, all ETCs must use the National Verifier when helping consumers apply to the Lifeline program. We are not able to opt out. The responsibility for determining whether a customer is eligible for Lifeline shifts from the service provider (Assist Wireless) to USAC (the Lifeline administrator).

The National Verifier is designed to automatically dip national and, in some cases, state databases to validate a customers' program eligibility. In OK, the National Verifier is only connected to the National Medicaid database and the HUD database.

Agents will use a USAC-hosted website (via CGM) to check a customer's eligibility for the Lifeline program, and if needed, submit eligibility documentation to USAC for manual review.

The National Verifier manages all of the following processes: Reverification, Enrollment & Annual Recertification

All existing customers will go through a one-time re-verification after hard launch that ensures they meet all Lifeline requirements and are still eligible to receive benefits.

How the National Verifier Works

1. When a service provider enrolls a new subscriber in CGM, they must confirm the customer's eligibility through the National Verifier's "Service Provider Portal".
    a. Complete and submit an application
    b. Upload proof of eligibility documentation, if needed

c. Check the application status of previous submissions

2. The National Verifier will determine if an applicant is eligible for a Lifeline benefit and, if so, provide approval by checking the following information.
    a. Identity
    b. Address
    c. Income or qualifying government program participation
    d. Compliance with the one benefit per household limit
3. The National Verifier checks applicant eligibility using APIs (automated data connections). If an automated data source is unavailable or the information cannot be found, the applicant can provide documentation to prove their eligibility through USAC's manual review process, conducted by the National Verifier's Lifeline Support Center.
    a. Early reports indicate that the manual review process can take anywhere from 5 to 15 minutes to get a decision, depending on the volume of orders in queue.
    b. Lifeline Support Center team reviews orders from 9am-9pm. Orders submitted after 9pm will not be reviewed until the next day.

If the customer is approved through the National Verifier, the agent can then proceed with enrollment in CGM per the standard process.

If the customer is not approved through the National Verifier, the customer cannot be enrolled or must provide additional or different proof documentation.

CGM & The National Verifier : What is Changing?

- Image capture for proof of eligibility will no longer be required.*
    - All customers that are automatically found in the National Verifier will not have to provide proof of eligibility.
    - *Customers that are NOT automatically found will be asked for proof of eligibility by the National Verifier.
- Orders requiring additional documentation for the National Verifier can take up to 1 hour to be reviewed, but on average take about 10-15 minutes.
    - We've heard reports that tribal program eligibility proofs take longer to review on average.
- The Compliance Department does not have visibility to the eligibility documentation you submit to the National Verifier and cannot override the decision rendered by the National Verifier.
- During the enrollment process, if you submit eligibility documentation for review and the NV rejects it, you will receive a generic rejection message. It will NOT contain a reason code to tell you why it was rejected.
    - The customer or the agent will need to call into the Lifeline Support Center at 800-234-9473 to determine why it was rejected.
        - If they hit the "Cancel" button, the order will be cancelled out.

- If they hit the "go to NaV" button, they'll have the opportunity to go back and modify/re-upload docs. This is a short term problem that should be fixed within a few weeks. CGM is already working on a fix with USAC to provide both the application ID and the rejection reason in the pop-up.

- The CGM order process may vary slightly from the slides below. Any and all updates will be made after hard launch and will be distributed to the field.

  Additional Notes:

  - We cannot guarantee that the National Verifier will review submissions in the order they are received.
  - Orders requiring eligibility documentation will take longer to receive a determination.
    - Reports have indicated that Tribal documentation has taken longer to review.
  - Since we DO NOT have access to the National Verifier, the CGM order flow outlined in this training may vary

National Verifier FAQs

1. When will the National Verifier hard launch in OK?
   a. Wednesday, January 22, 2020
2. After hard launch, when are customers required to provide Proof of Eligibility?
   a. When the customer is not found by the National Verifier
3. After hard launch, how many months can an ID be expired in order to be valid proof?
   a. 0
4. What will I (an agent) need in order to be able to submit orders on January 22, 2020?
   a. A RAD ID, NLAD Credentials and a CGM Login
5. Can I (the service provider) initial and e-sign on behalf of the customer in the National Verifier portal and/or in CGM.
   a. No
6. How often do customers need to Reverify?
   a. Reverification is a **ONE-TIME** process for all existing customers (enrolled prior to 1/22/20) to go through during hard launch of the National Verifier to verify continued eligibility for Lifeline service.
7. Who administers the National Verifier?
   a. USAC
8. Which databases in Oklahoma does the National Verifier have automatic connections to?
   a. HUD & Medicaid
9. My customer was denied by the National Verifier, Can I speak to Compliance?
   a. USAC's Manual Review Team will make the final decision on each eligibility proof. The Compliance Department **does not** have visibility to the eligibility

documentation you submit to the National Verifier and **cannot override** the decision rendered by the National Verifier.

10. My customer was denied by the National Verifier, What can I do?
    a. If the customer is not approved through the National Verifier, the customer cannot be enrolled or must provide additional or different proof documentation.
11. Who can I speak to regarding my customer being denied by the National Verifier?
    a. Lifeline Support Group (800) 234-9473
12. Why is it taking so long for my order to be approved by the National Verifier?
    a. The National Verifier can take up to 1 hour to be reviewed, but on average take about 10-15 minutes. We cannot guarantee that the National Verifier will review submissions in the order they are received. Orders requiring eligibility documentation will take longer to receive a determination.

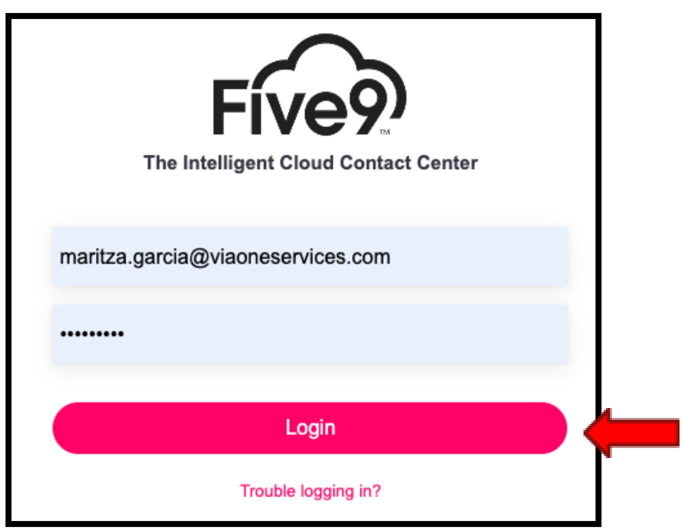
Five9

Five9 is an inbound, outbound and multichannel contact center that enables businesses to fully run their contact center operations. The cloud-based call center platform enables agents to communicate with customers via phone, email, chat, SMS, social platforms and more. This is the program used to log into the Sales Support queues where we receive all incoming calls from our agents.

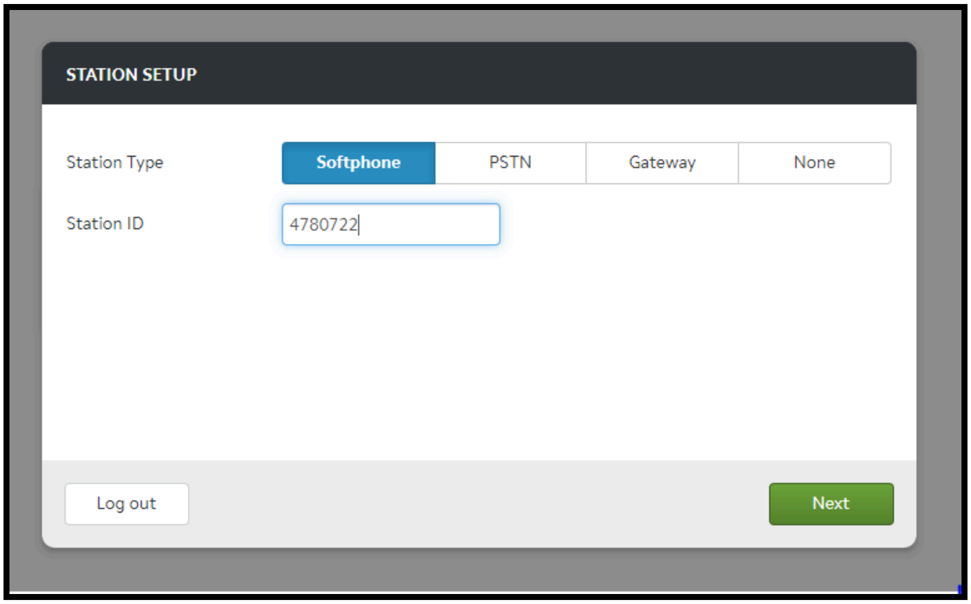
All calls are recorded and monitored for quality assurance.

Installing Five9

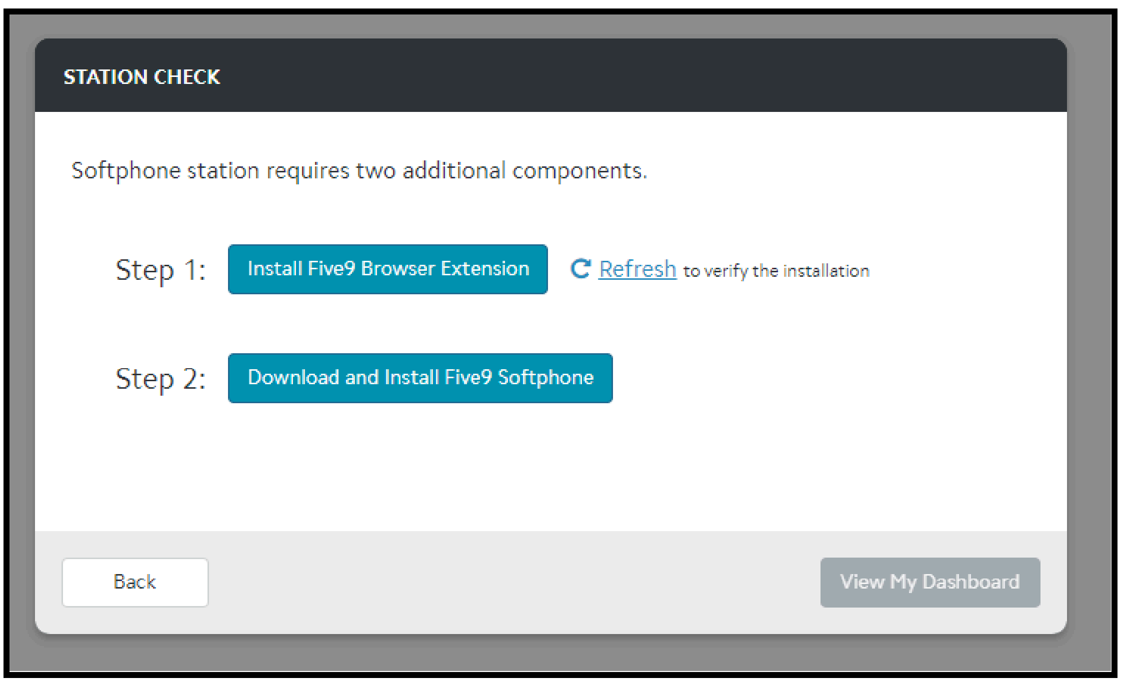
1. Log in to Five9 using your credentials



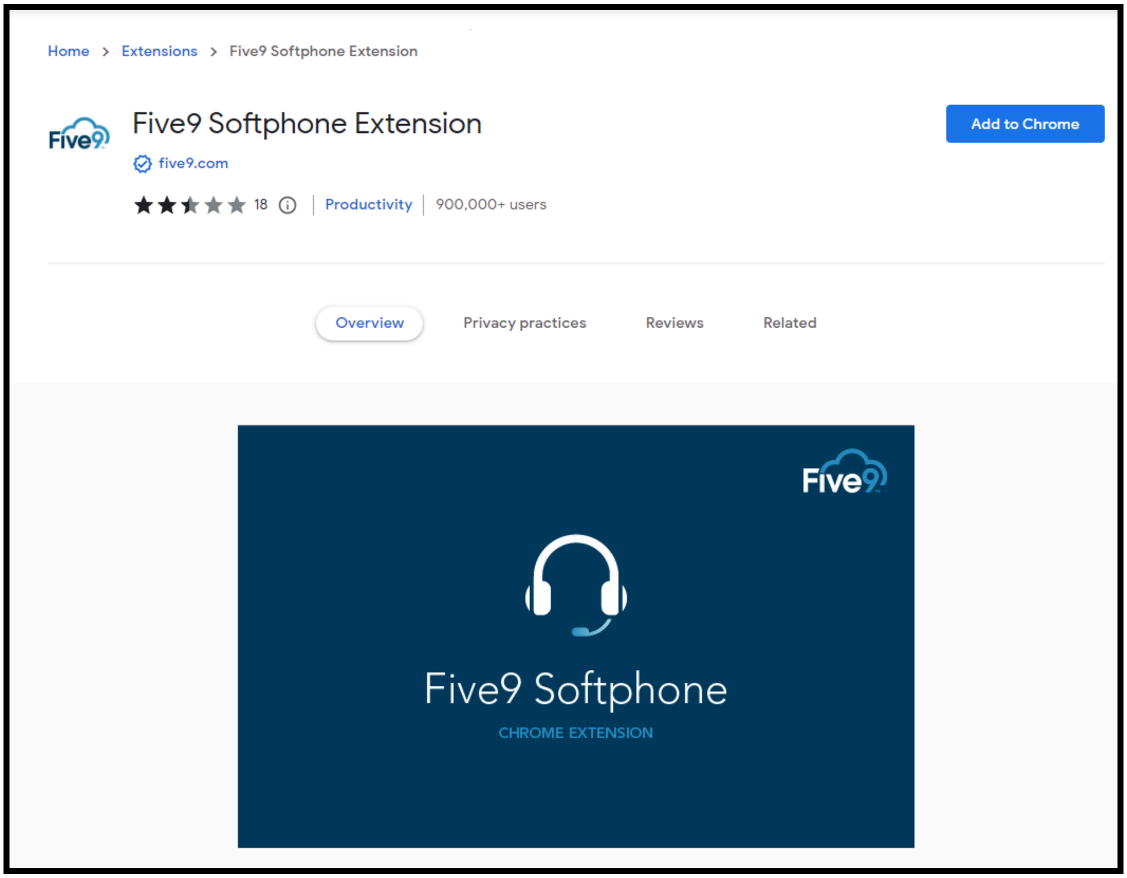
2. Enter in Station ID and Select [Next]



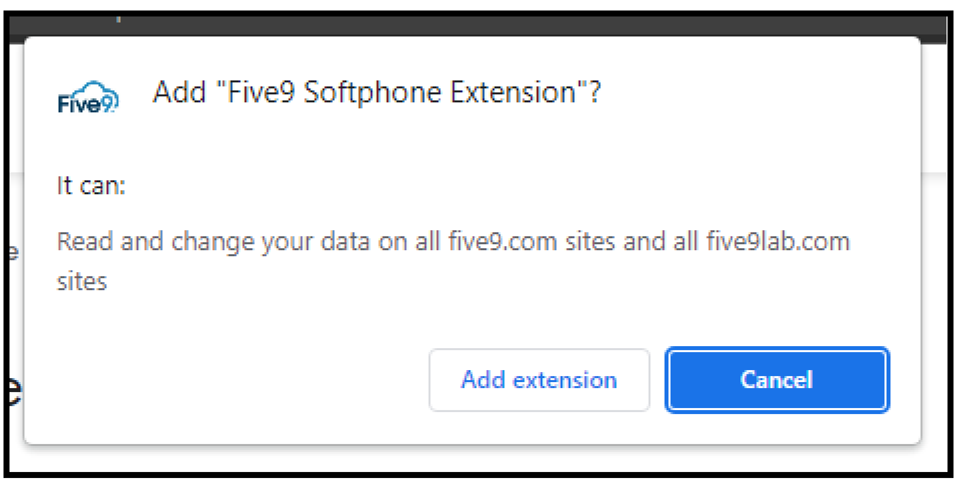
3. Click on [Install Five9 Browser Extension]



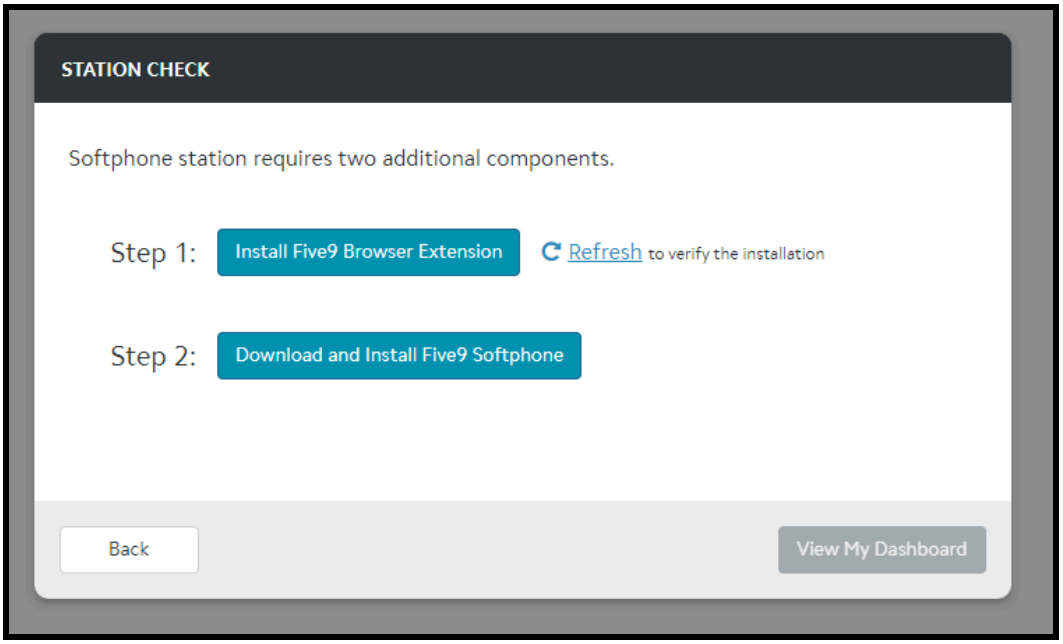
4. Click on [Add to Chrome]



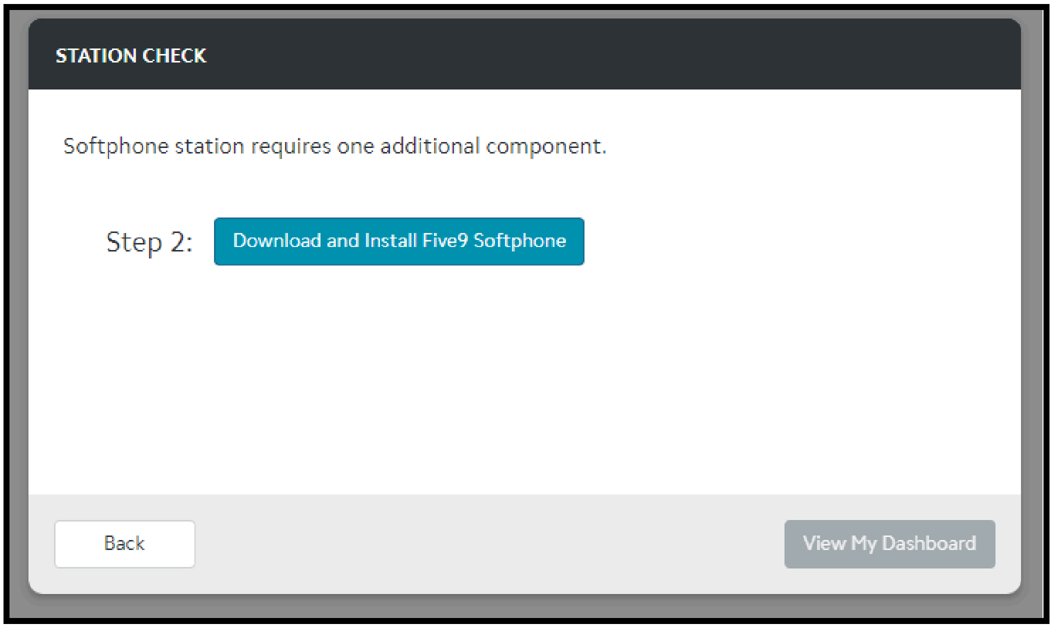
5. Select [Add extension]



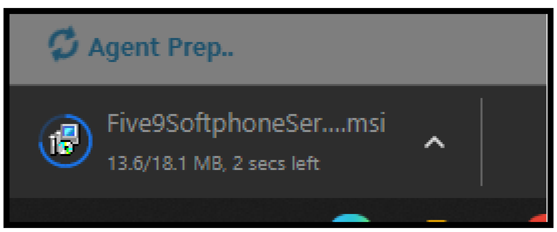
6. Click [Refresh]



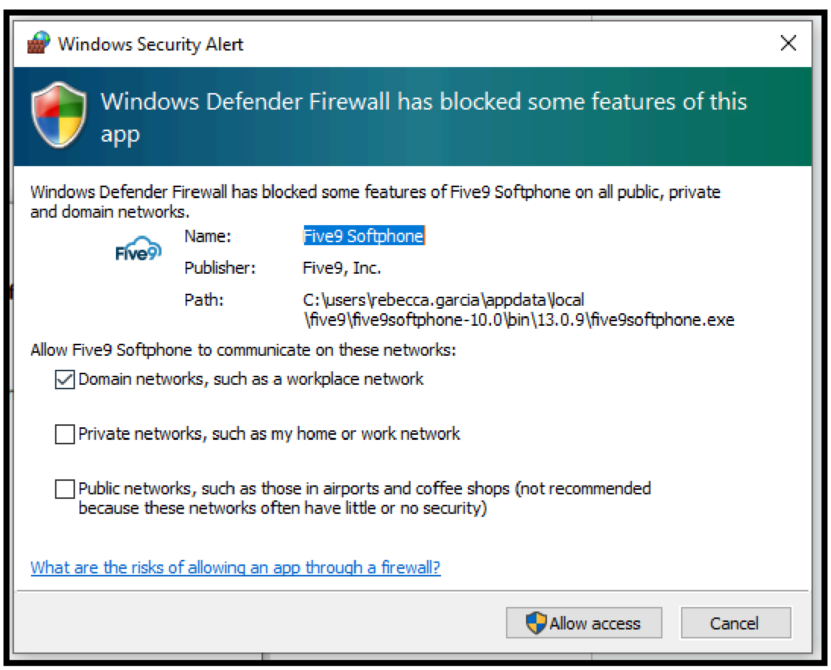
7. Once page resets click on [Download and Install Five9 Softphone]



8. Open file when download is complete and click on [Finish]

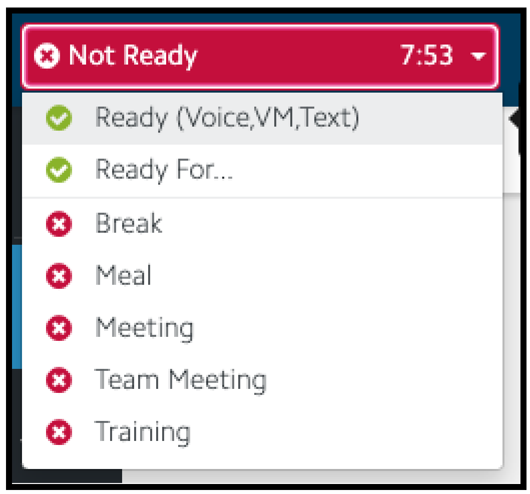


9. On this pop up click on [Cancel]



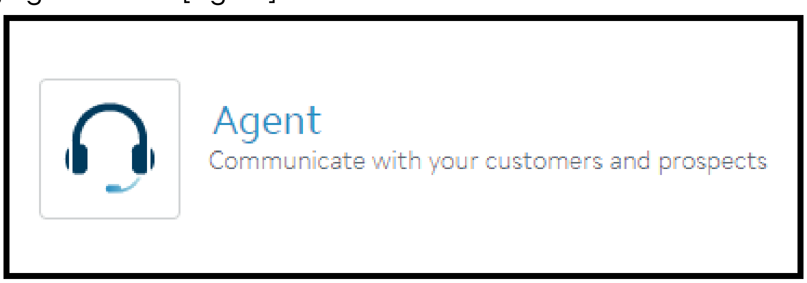
10. Once logged in, your dashboard will look like the image below.

11. Change your status in the top left corner to [Ready] to begin taking calls, chats, emails.

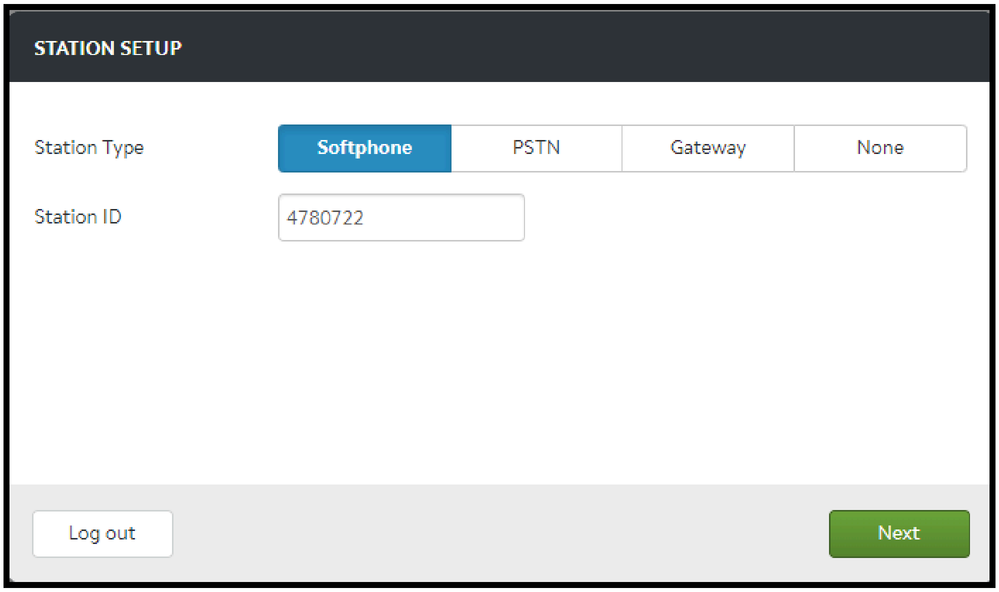


Logging in to Five9

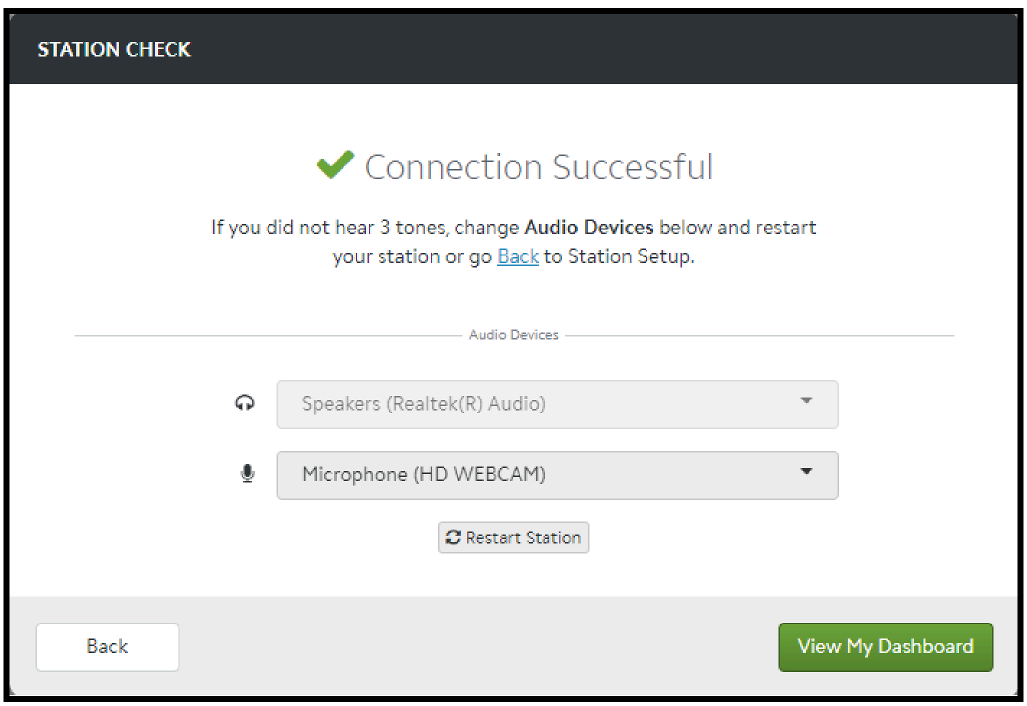
1. Login to [Five9]() using your credentials
2. After logging in click on [Agent]



3. Enter your **Station ID** and click [Next]
    a. Station ID will be provided to you by Rebecca.

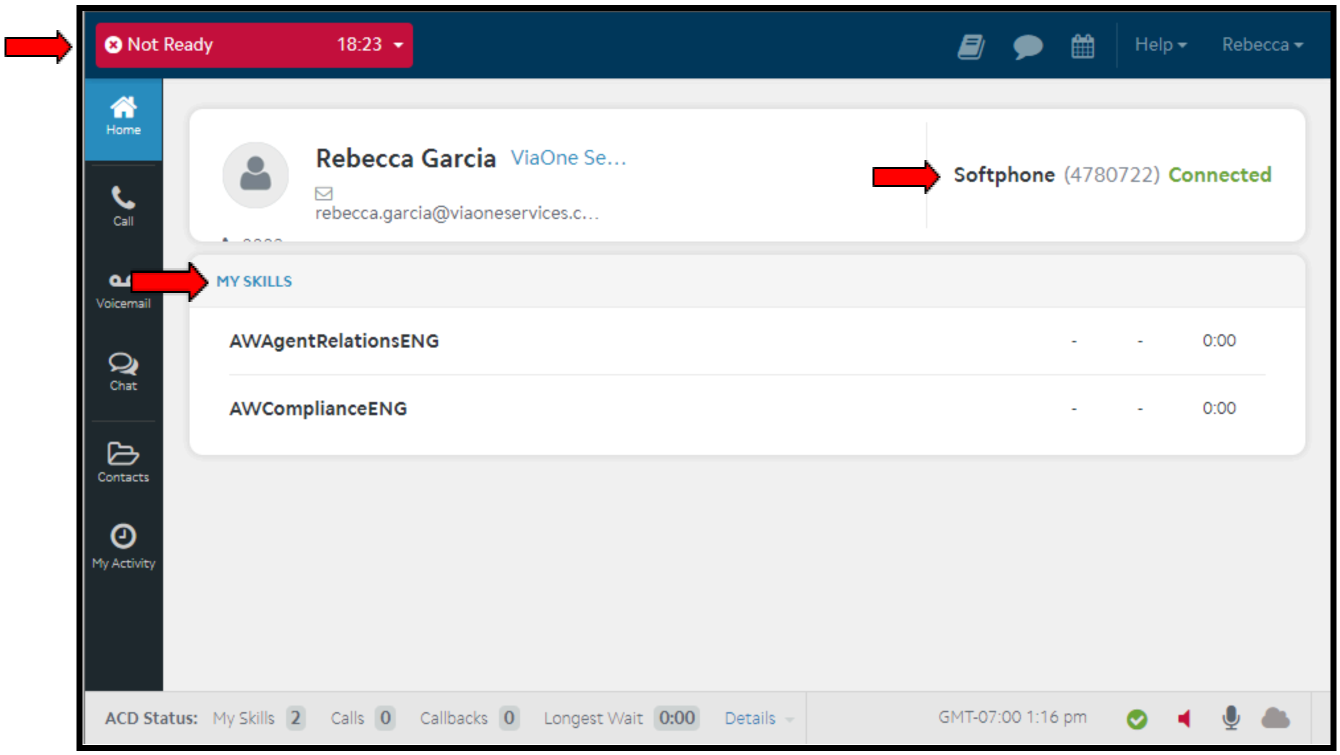


4. System will perform a station check to make sure speakers and microphone are working properly. Once this check is complete click on [View My Dashboard]



5. Once on the dashboard you will be able to see the following:

a. Current State
b. How long you have been in that state for
c. Skills (Queues) you are assigned to
d. Connection Status

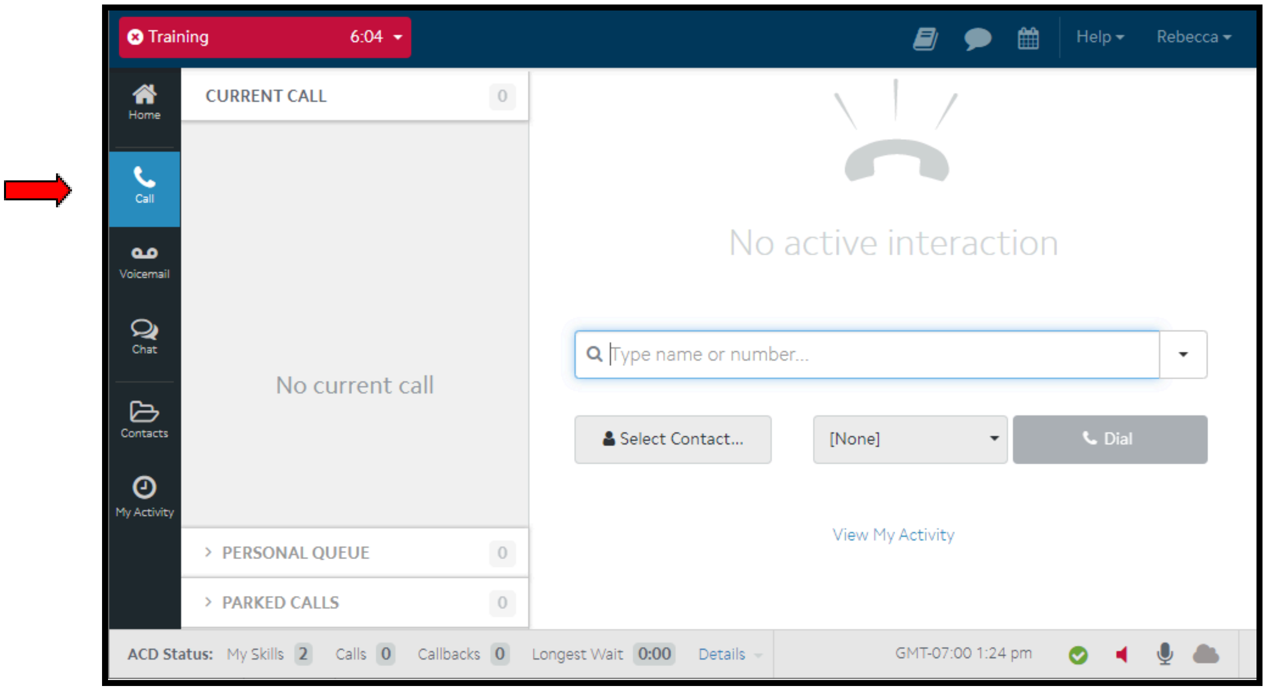


6. Under the Current State the following options are available:
    a. Ready (Voice)
        i. Ready to start taking incoming calls
    b. Ready For...
        i. This will show options for emails and chats once that is built in.
    c. Break
    d. Meal
    e. Meeting
    f. Team Meeting
    g. Training

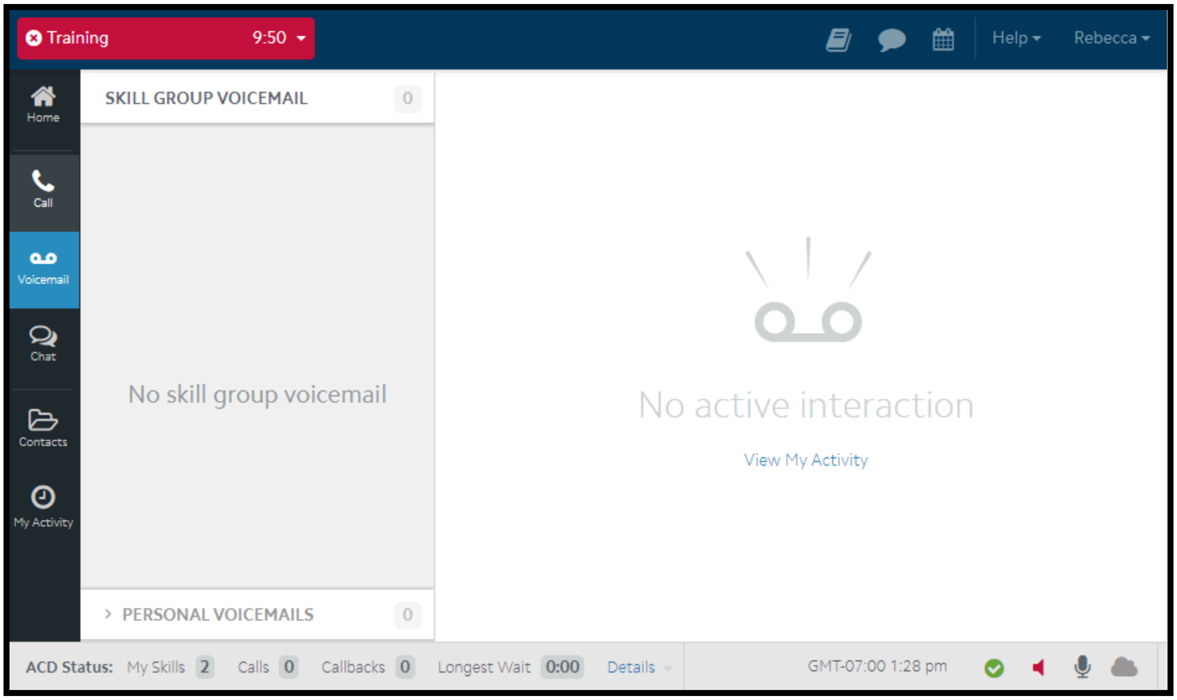
**Please note that the system keeps track of how long you are under each state. This will ensure all assigned reps are logged in during high call/chats volume.*

Dashboard Menu

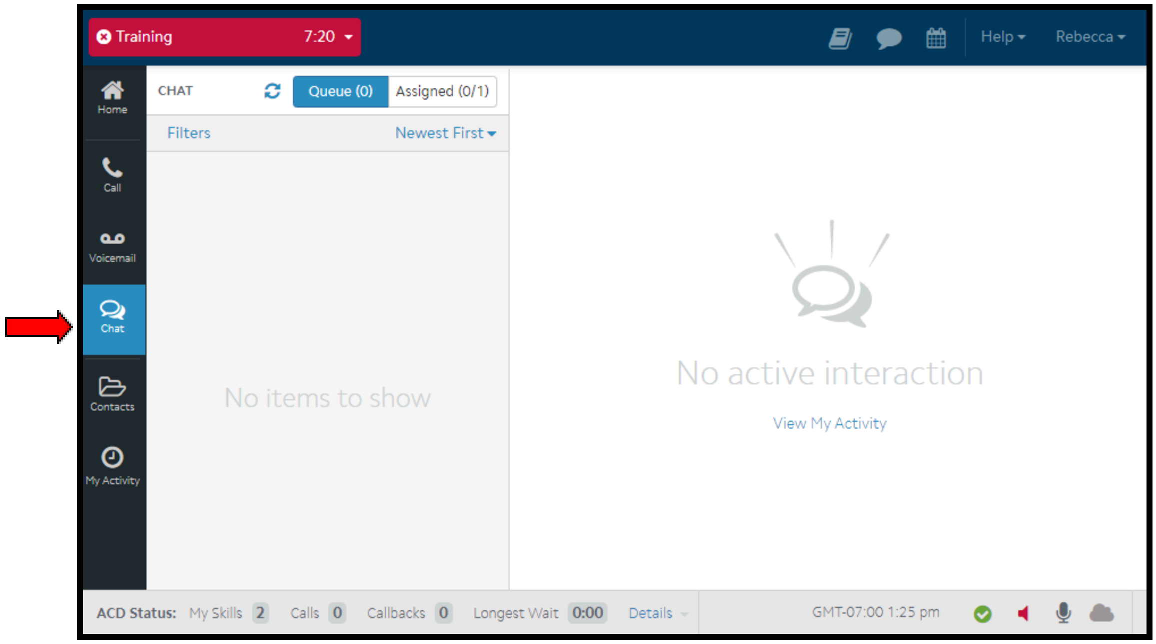
- The Call section will show the current call you are on and the option to dial a number.



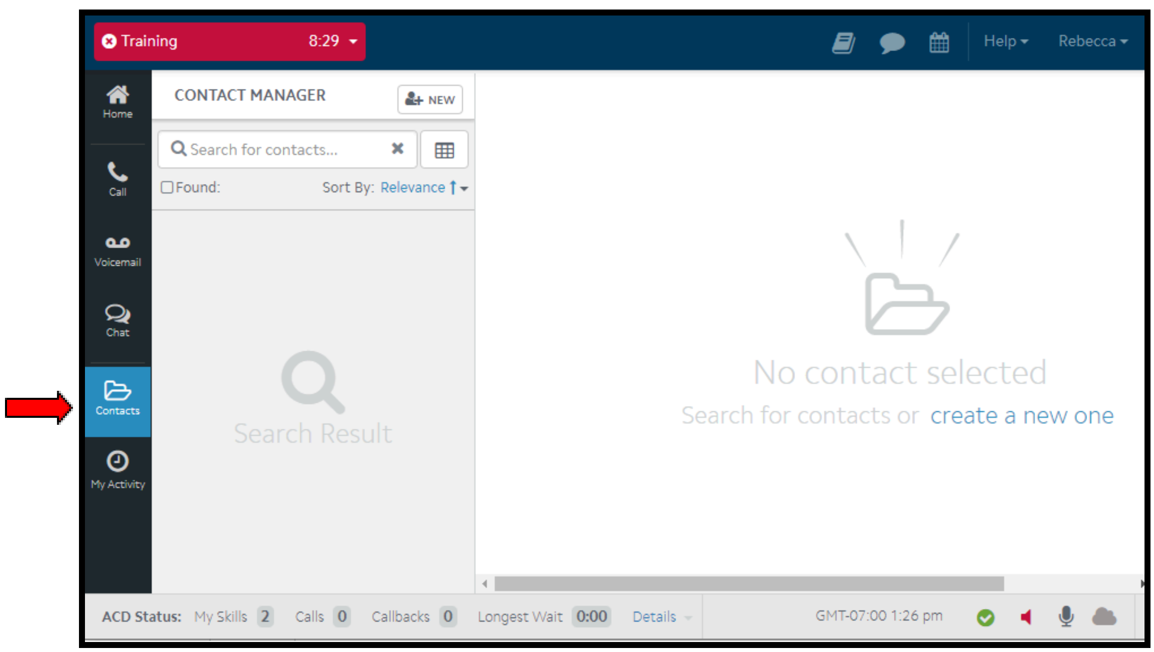
- **The Voicemail section will show any voicemails that are sent to you.**


Training
9:50
Help
Rebecca
Home
Call
Voicemail
Chat
Contacts
My Activity
SKILL GROUP VOICEMAIL
0
No skill group voicemail
PERSONAL VOICEMAILS
0
No active interaction
View My Activity
ACD Status: My Skills 2 Calls 0 Callbacks 0 Longest Wait 0:00 Details
GMT-07:00 1:28 pm

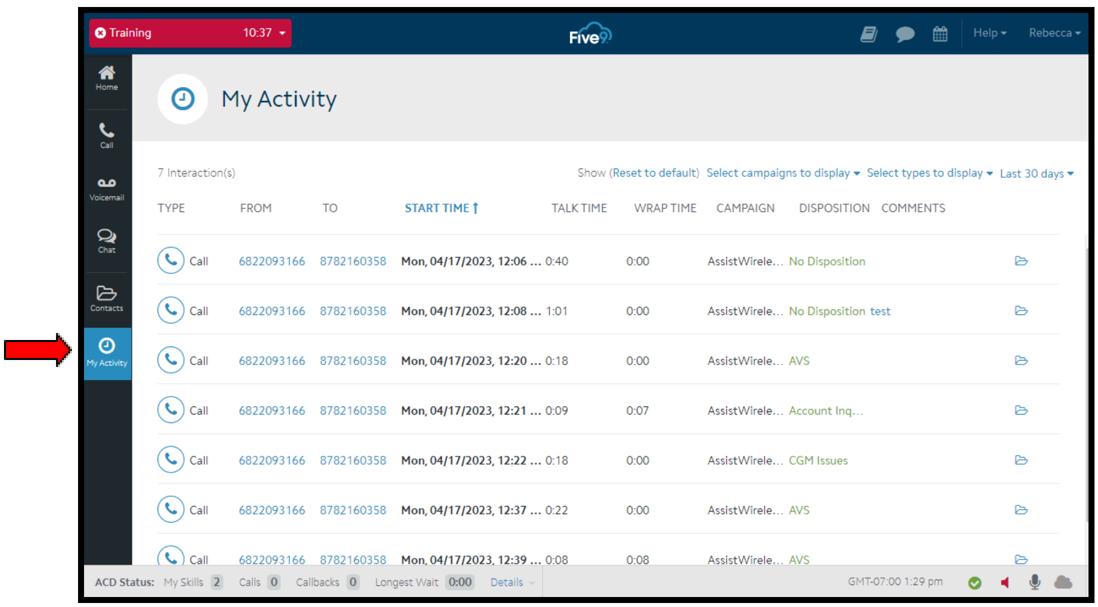
- The Chat section will show your chat history along with your currently open chat.



- The Contacts section will show your saved contacts.

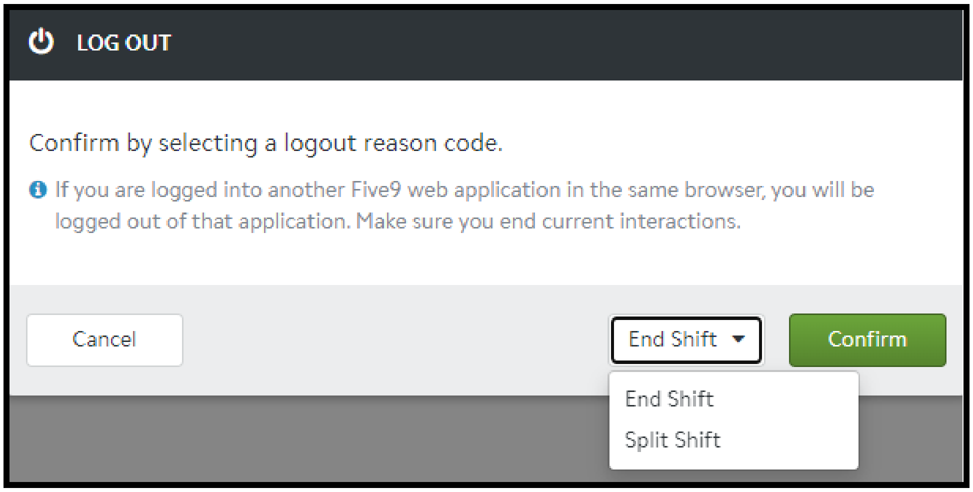


- The My Activity section will show the following:
    - Type of interaction (call, email, chat)
    - Incoming number
    - Call date and time
    - Talk Time
    - Wrap Time
    - Campaign (queue)
    - Disposition
    - Comments



- At the bottom of the screen you will see the following:
    - Number of queues your are assigned to
    - Calls pending
    - Callbacks
    - Longest Wait time
    - Current Time
    - Connection status
    - Volume control
    - Mic volume
- When clicking to log out you will be prompted to enter in the reason you are logging out for. Reason options will be as follows:
    - End Shift

○ Split Shift



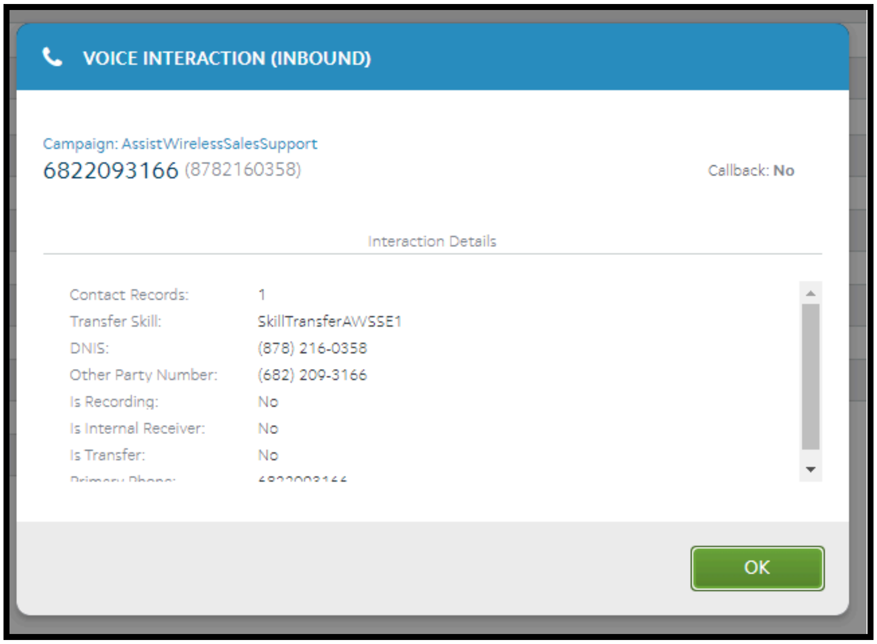
Processing Calls

Your station enables you to make and receive external and internal calls. All calls will be monitored and recorded. In addition, if this feature is enabled, you hear an alert when a supervisor starts to monitor your calls.

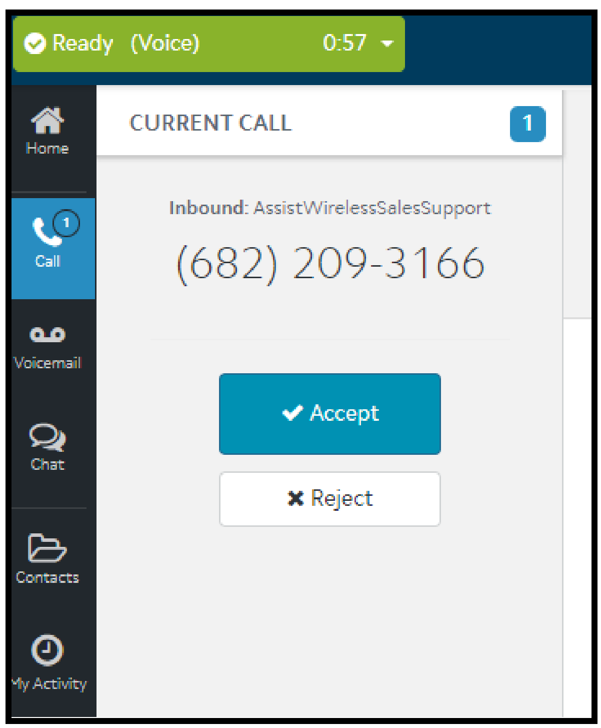
**Although all possible options are described, your administrator may allow only a subset of these features. You may use only one agent application at a time in each computer. Otherwise, some of your calls will be dropped. Before making or receiving a call, be sure to set your state appropriately.*

Receiving Calls

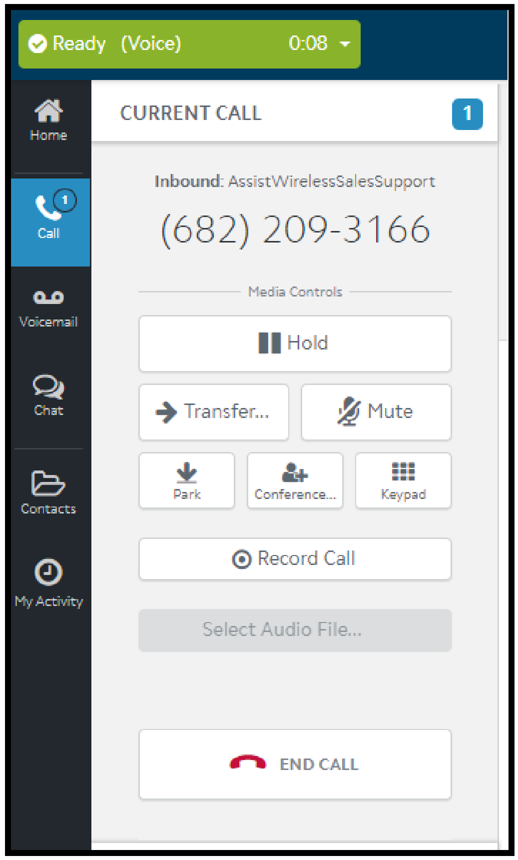
1. When you are receiving a call, the following pop will appear showing the call details. Click [OK]



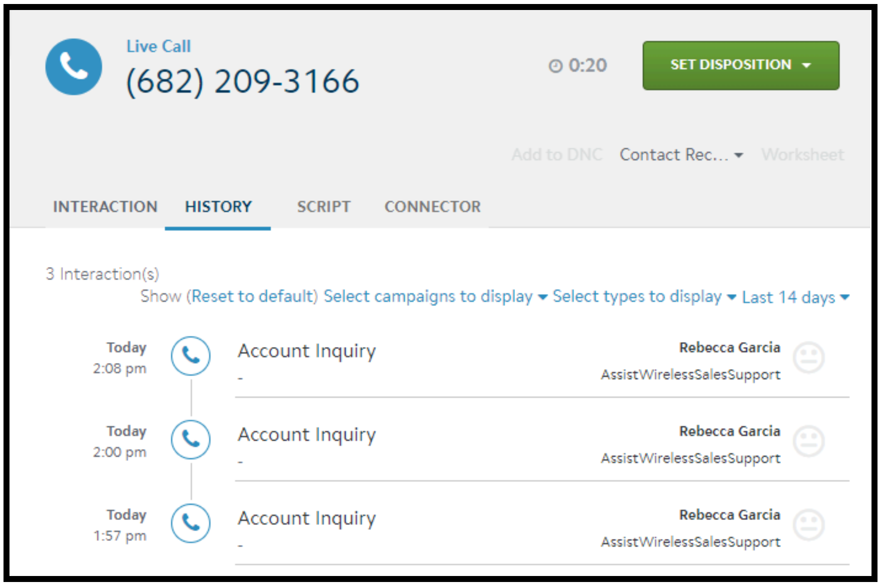
2. On the next screen you will be able to either Accept or Reject the call.

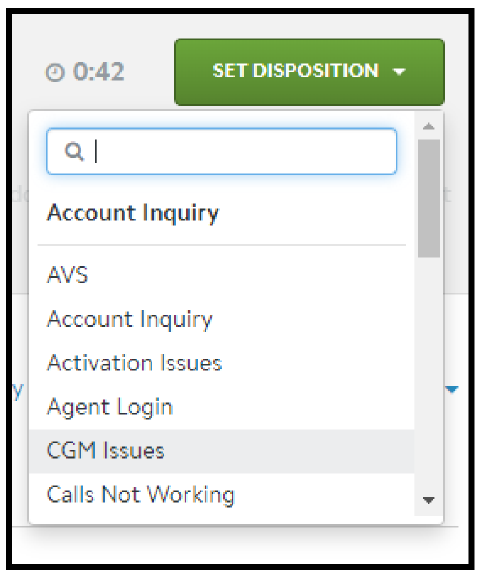


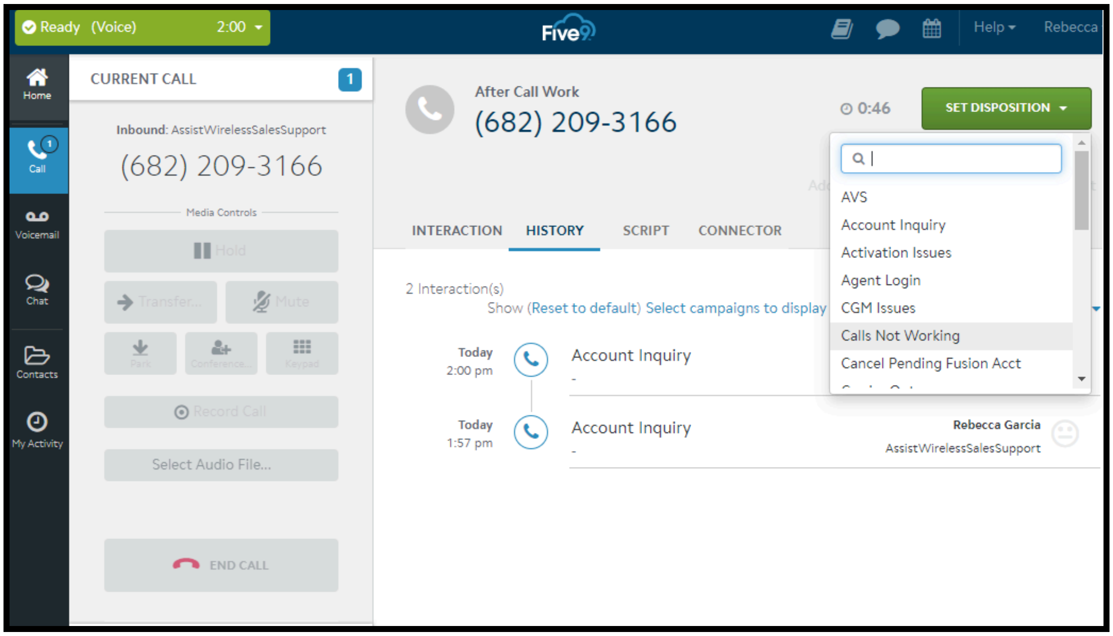
3. Once on the call, you will be able to see current call details on the left hand side.



4. On the right hand side, you will see the call duration along with History and disposition drop down menu.


Live Call
(682) 209-3166
0:20
SET DISPOSITION
Add to DNC
Contact Rec...
Worksheet
INTERACTION
HISTORY
SCRIPT
CONNECTOR
3 Interaction(s)
Show (Reset to default) Select campaigns to display Select types to display Last 14 days
Today 2:08 pm
Account Inquiry
Rebecca Garcia
AssistWirelessSalesSupport
Today 2:00 pm
Account Inquiry
Rebecca Garcia
AssistWirelessSalesSupport
Today 1:57 pm
Account Inquiry
Rebecca Garcia
AssistWirelessSalesSupport


0:42
SET DISPOSITION
Account Inquiry
AVS
Account Inquiry
Activation Issues
Agent Login
CGM Issues
Calls Not Working



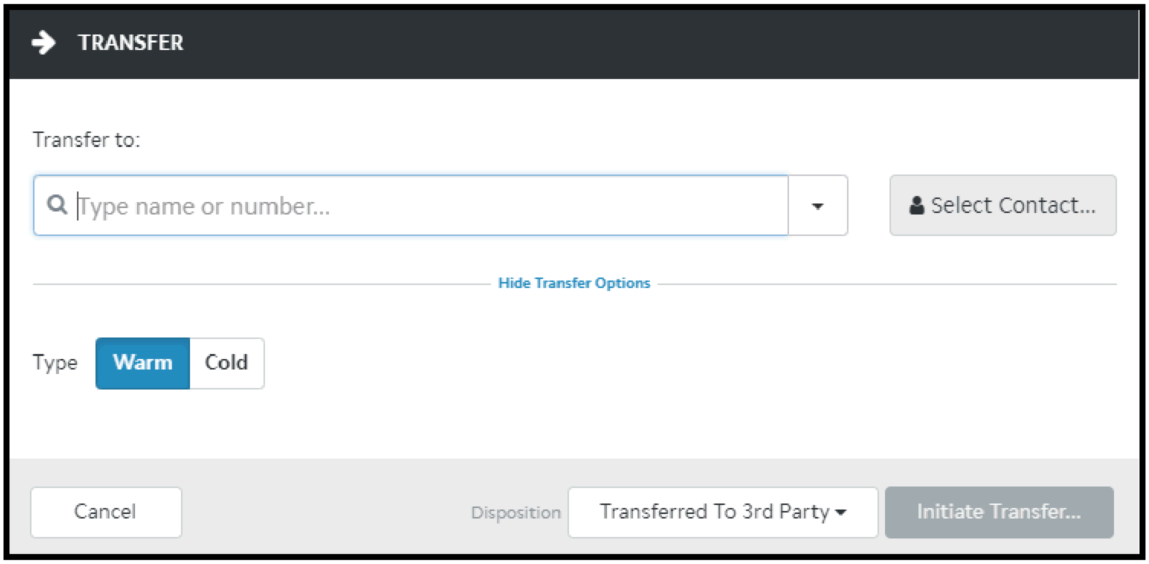
Transferring Calls

If you have permission, you may transfer calls to other agents, skill group members, internal or external parties, or campaigns. Before customers are transferred, they are put on hold. You can transfer calls to queues that you cannot monitor because, in this case, you select a recipient from your entire address book, which contains all skills and agents. For example, transferring a call to an inbound campaign can be useful to perform an after-call survey. When a call is transferred to you, process it as you would any other call. After you complete your part of the call, assign a disposition. You can transfer a call in one or two steps:

- Two-step (warm or attended) transfer: speak briefly with the recipient before disconnecting yourself from the initial party and transferring the call.
- One-step (cold or blind) transfer: disconnect yourself immediately from the initial party and transfer the call at the same time. During a one-step transfer, the customer hears everything before the recipient answers the phone, such as ringing, music on hold, and voicemail.

Proceed as follows:

1. Click Transfer

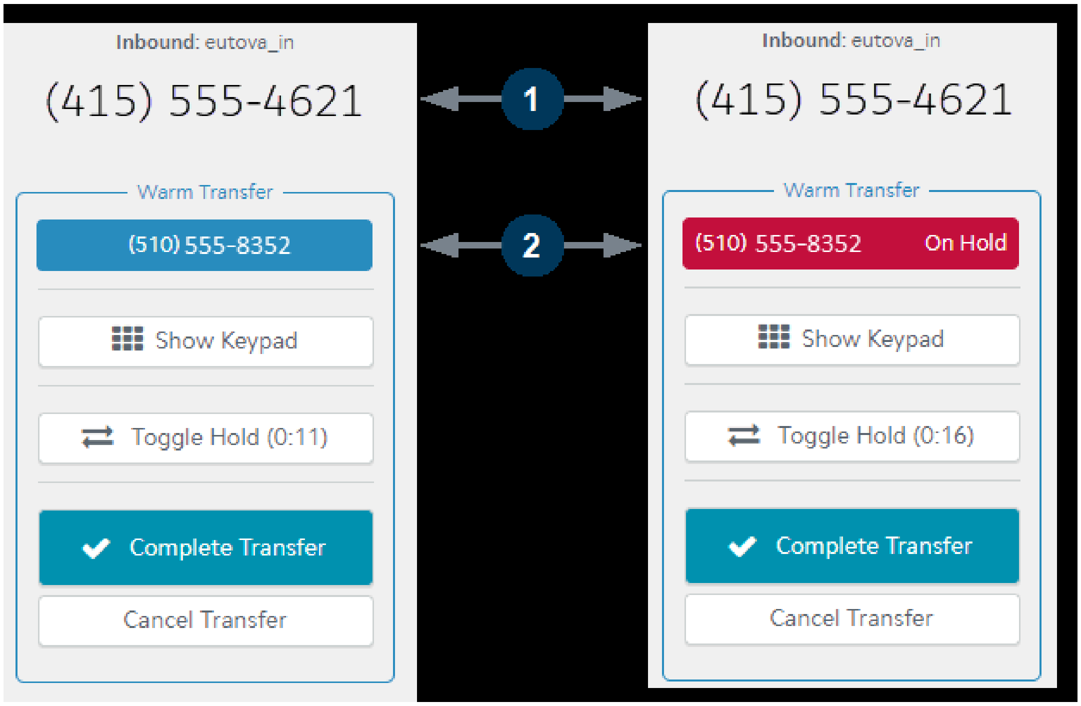


2. Select a third party
    a. When you start typing a name, the appropriate names appear in a list. You can see the Ready status of the intended party to whom you are going to transfer the call: Not Ready to take a call (Red), Ready to take a call (Green), or offline (Gray). You can transfer a call only to an agent who is online.
3. Select a contact in the list and click the phone icon to select the desired phone number. Alternatively, type a phone number, or use the keypad to enter a number.

Warm Transfer

This method enables you to speak with the third party before transferring the call. During that time, the call to transfer is on hold.

1. Click Warm.
2. Select a disposition, and click Initiate Transfer.
3. Speak briefly with the destination recipient of the transfer.



1. Original party
2. Destination party

Click **Toggle Hold** to switch back to speaking to the original calling party. The destination recipient is then placed on hold. You can toggle back and forth between the two parties.

4. To transfer the party who is on hold, click Complete Transfer.

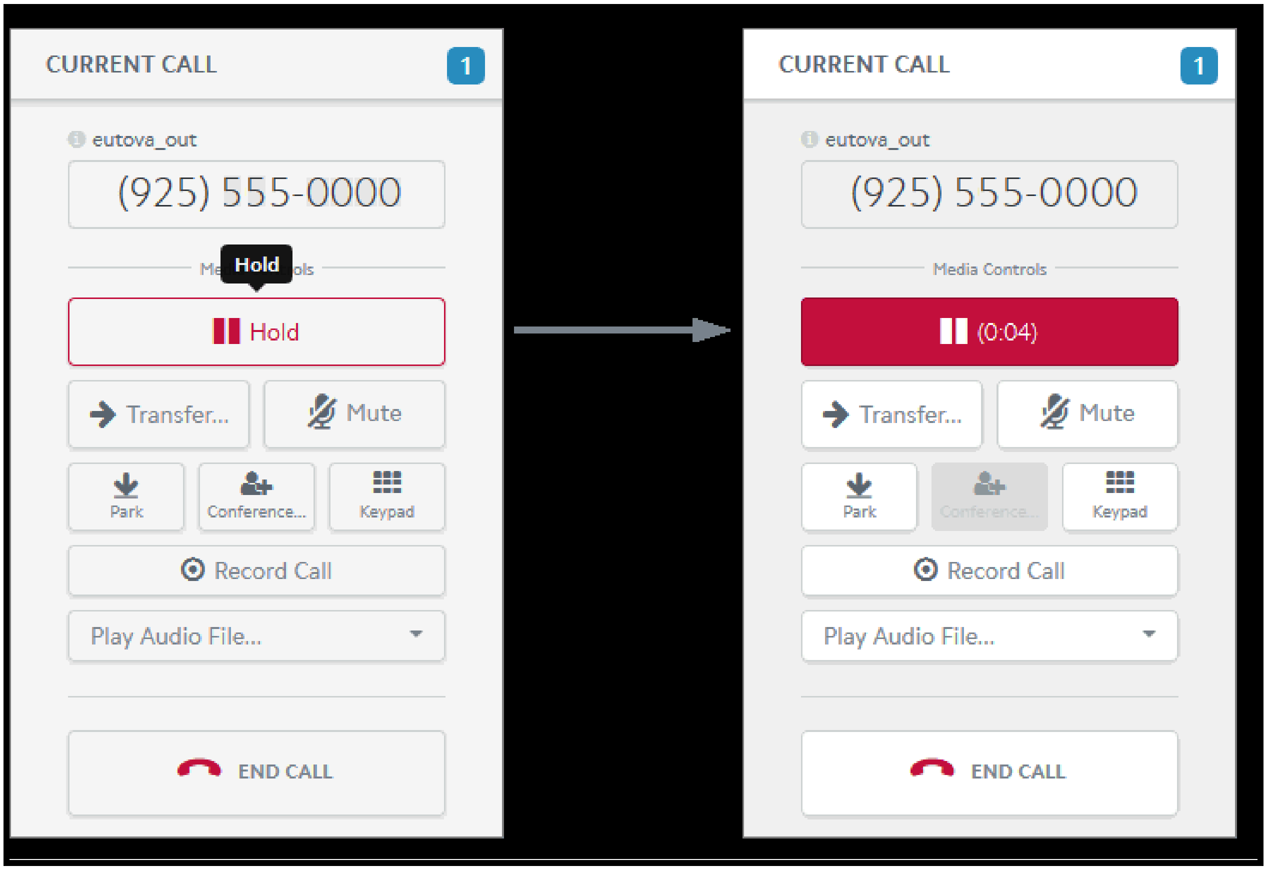
Managing Calls on Hold and Parked Calls

When you need to complete a task, you can place a call on hold for a short time. If you need to make or receive another call, you can park a call by keeping the party on hold for a longer time. While a call is on hold or parked, you can transfer the call or create a conference.

Calls on Hold

During a call, click **Hold** when you need to obtain more information before transferring or finishing the call. The icon becomes red. While on hold, your party hears music. The timer indicates how long the caller has been waiting. To take the call off hold, click the button again.

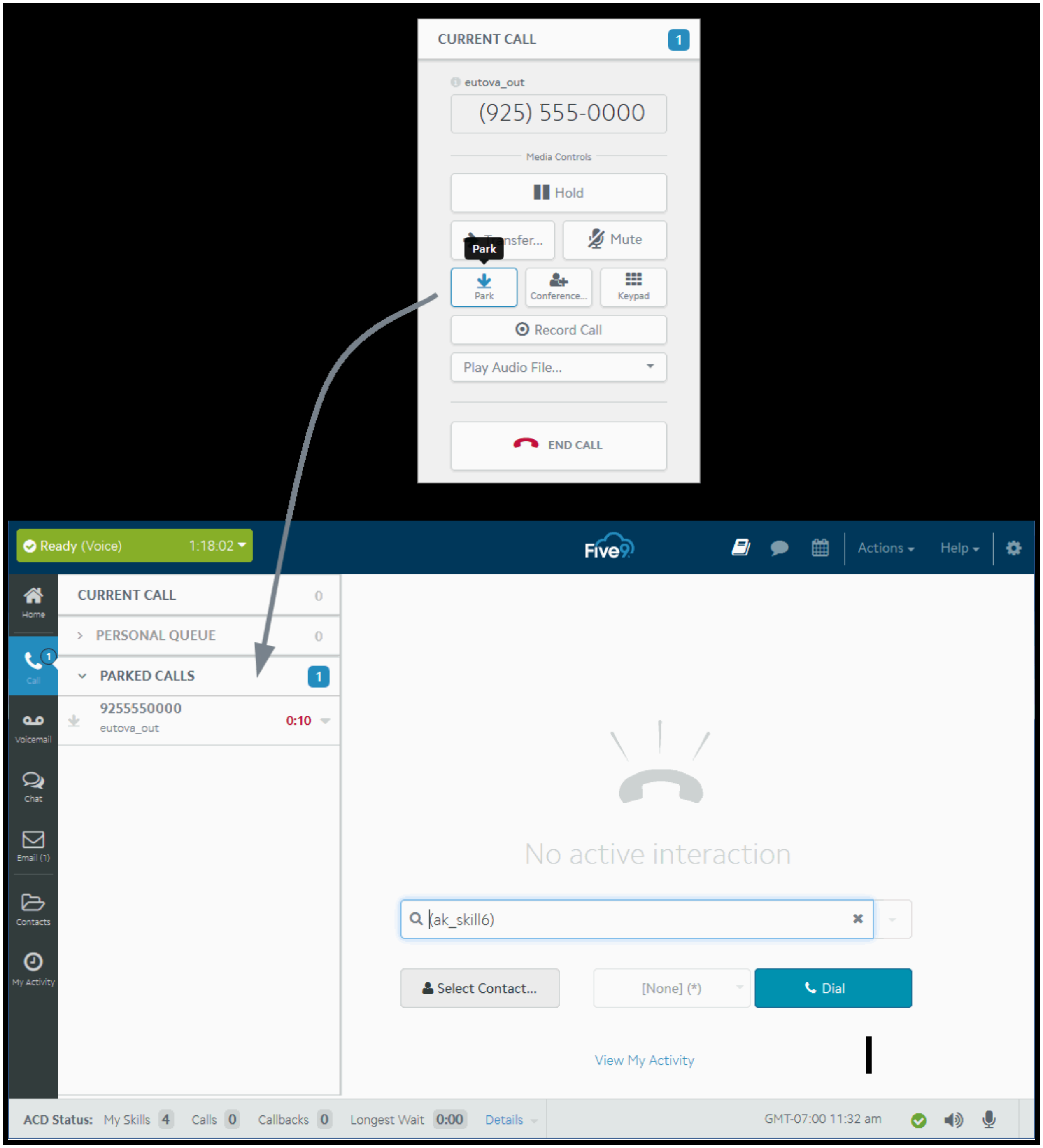
When you place a caller on hold, you can perform certain activities, but you cannot start another call.



Parked Calls

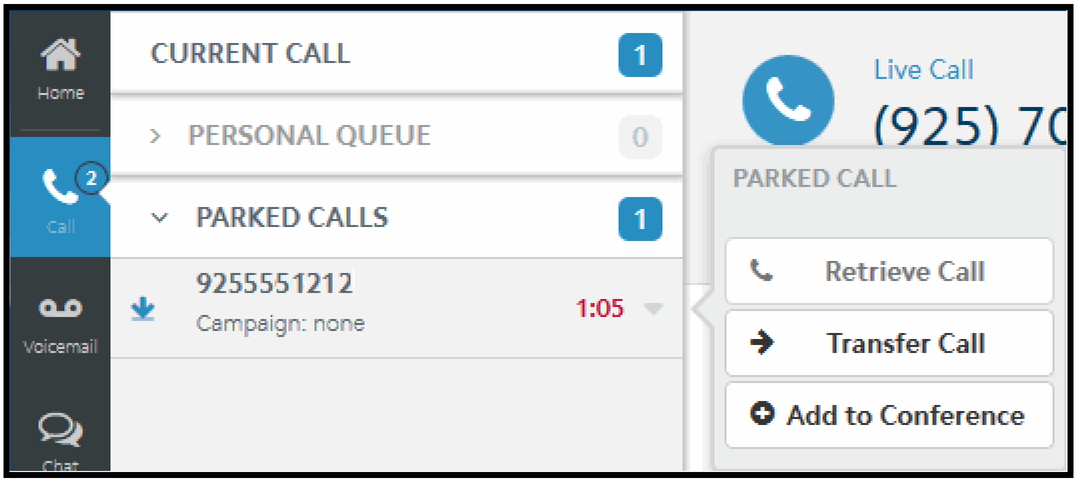
Park a call when you want to keep the party on the line while you receive or make another call, for example to a supervisor or another agent. If you do not have permission to park calls, the button does not appear. You can park internal and external calls. In conferences, you can park participants individually or all participants at the same time

1. During a call, click **Park**.
   The call displays in the open Parked Calls tab at the top of your adapter. The center of your dashboard is cleared so that you can make another call. If you have multiple parked calls, they display above each other. The closed Parked Calls tab displays at the bottom of the adapter.



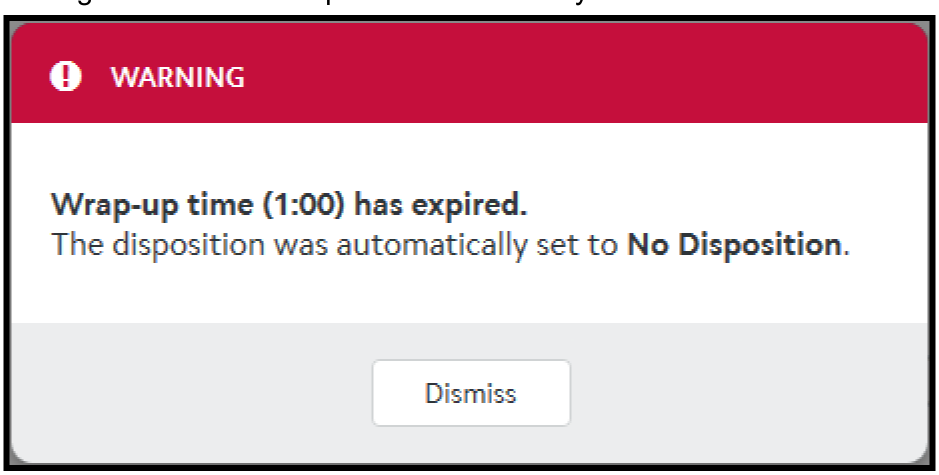
Information about the parked call, including duration.

2. Click Make a Call, and complete the new (second) call as needed.
3. To finish processing the parked (first) call, click the down arrow on the right, and process as needed: retrieve, transfer, or add to conference.

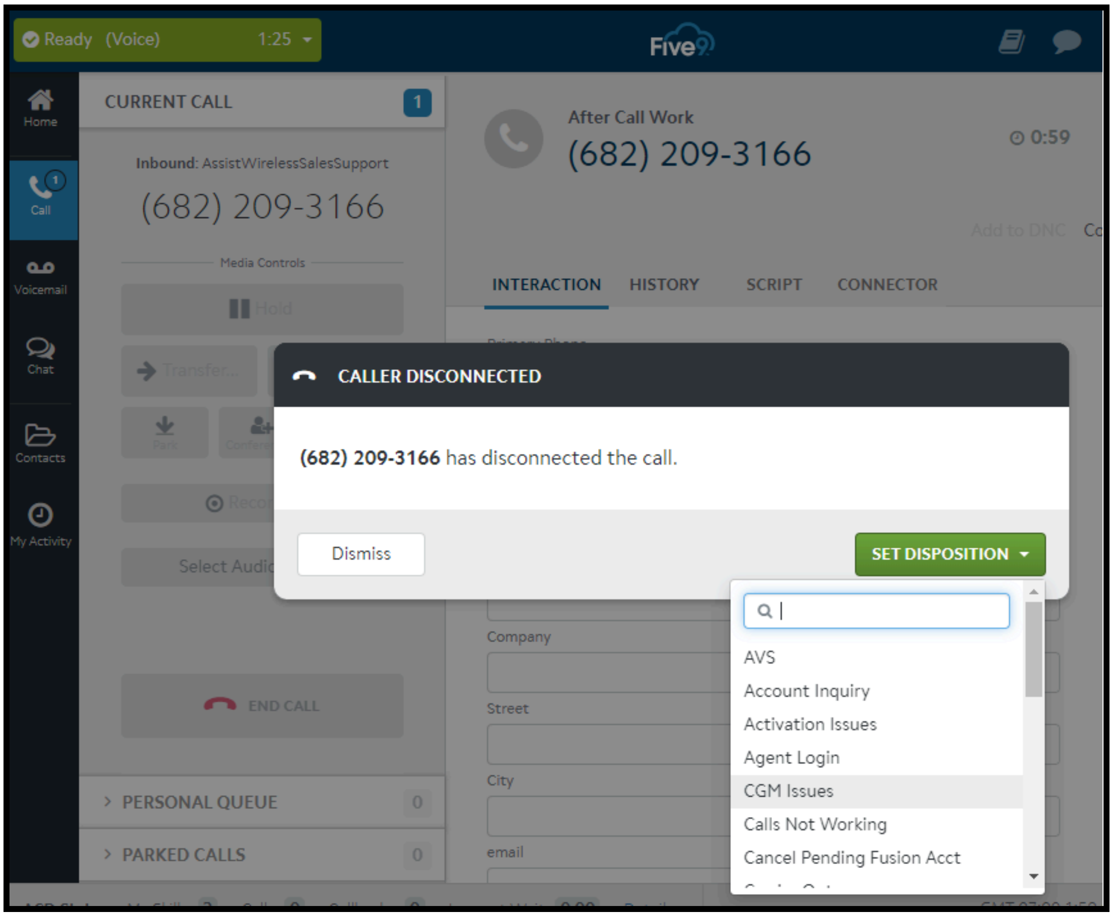


Dispositions

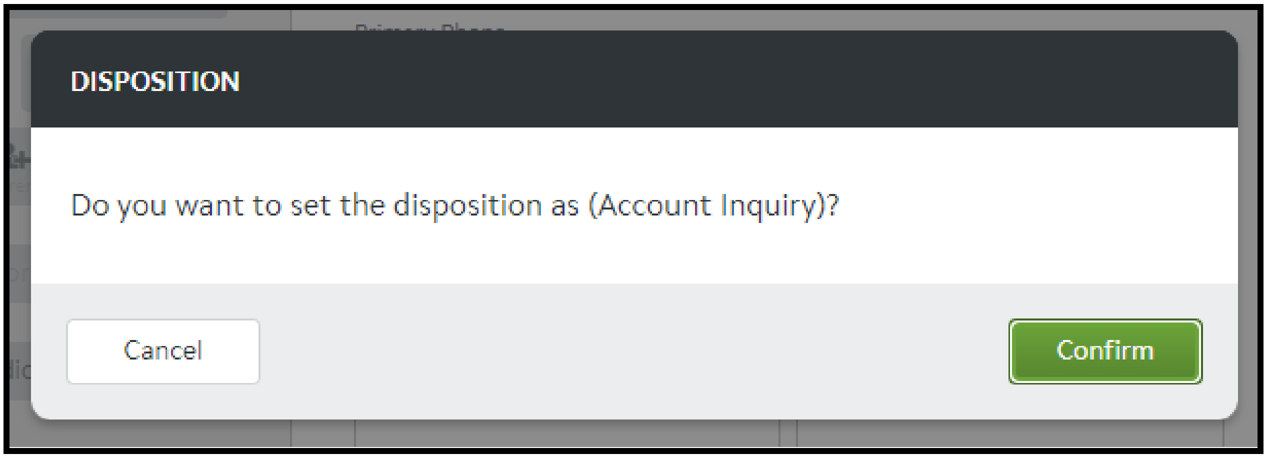
When you or your contact ends a call, choose the most accurate disposition that indicates the result of the call. Set the disposition for the call to save the information. You can process another call immediately. If your administrator has set a time limit for a campaign, the system automatically sets a disposition after that time if you have not selected a disposition, as displayed in this figure. You are then placed in Not Ready state.



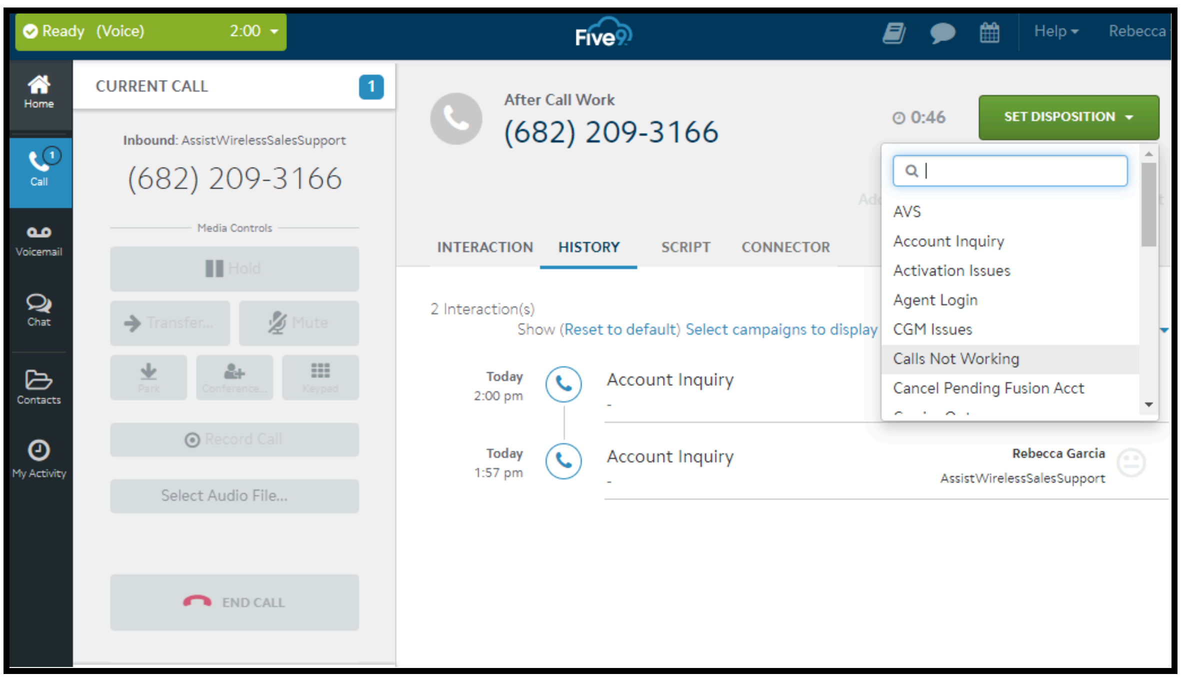
1. If the caller disconnects the call, a pop up will appear and a disposition will be HAVE to be entered.



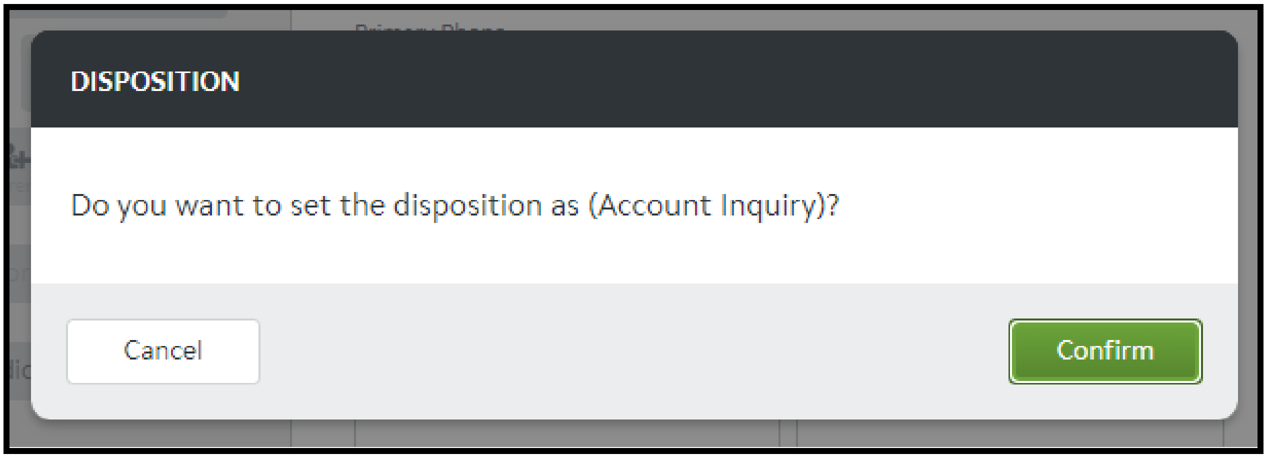
2. You will need to confirm the disposition you selected and click [Confirm]



3. If you (representative) disconnects the call, the call details will stay until a disposition is selected..

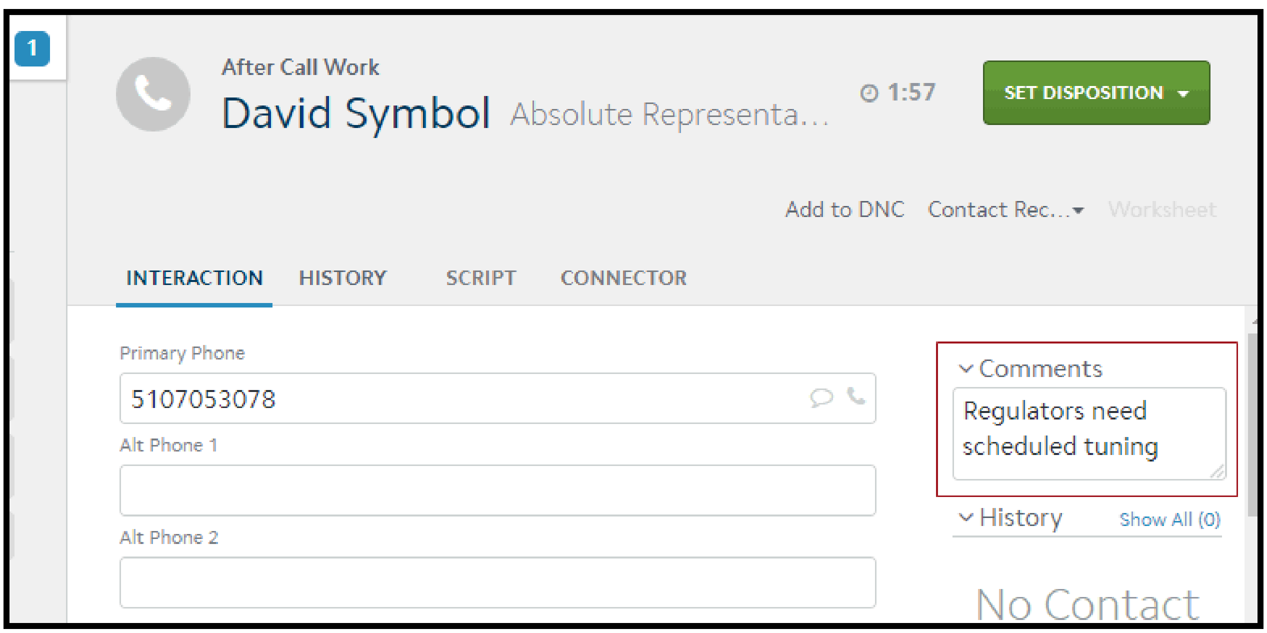


4. You will need to confirm the disposition you selected and click [Confirm]



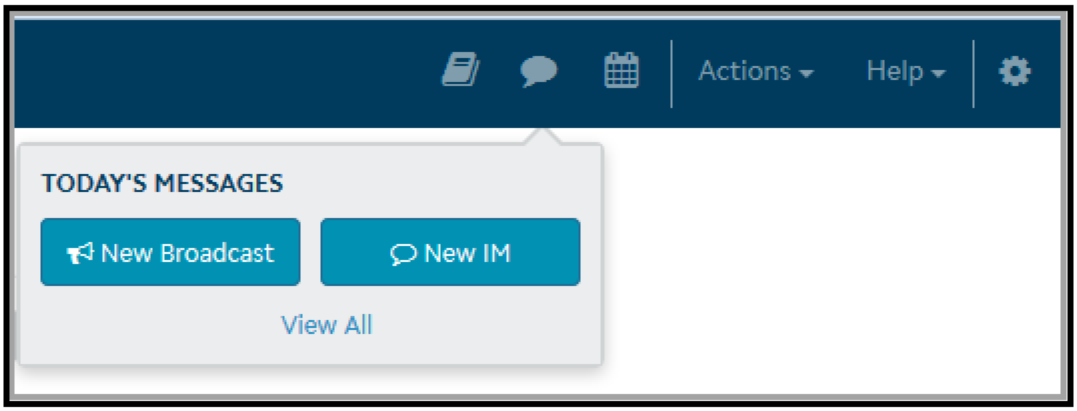
Adding Comments

At any time before you select a disposition, whether during a call, call preview, and even while the phone is ringing, you can add comments in the Interaction tab.



Sending and Receiving Internal Messages

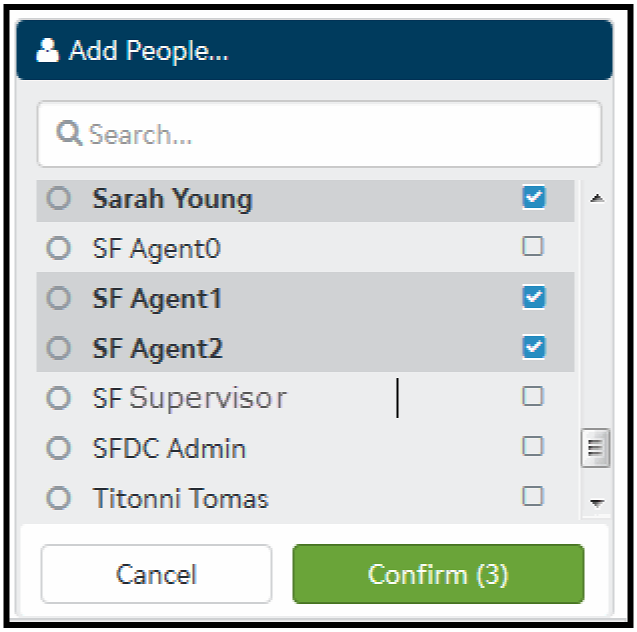
To exchange messages in real time with supervisors and other internal users, you may start or participate in chat sessions. You cannot use a chat session to communicate outside your organization. You may participate in multiple messages simultaneously. In this case, you can open each one in a separate new window. Old messages are deleted after 30 days. To open the messages menu, click the conversation icon in the toolbar.



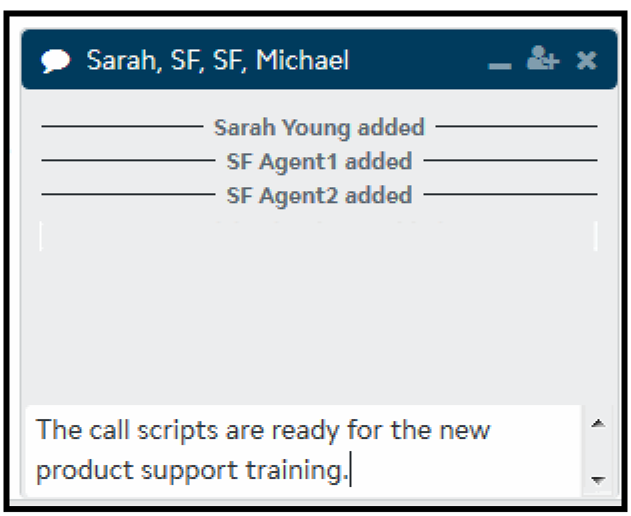
Initiating Internal Chat Sessions

One or more internal users can participate in a chat session. You can create a chat session or broadcast a message to multiple internal users.

- Click New IM.
- Select the users that you want to invite, or search for participants by entering part or all of their name in the search field. A green circle before the name indicates that the user is logged in.

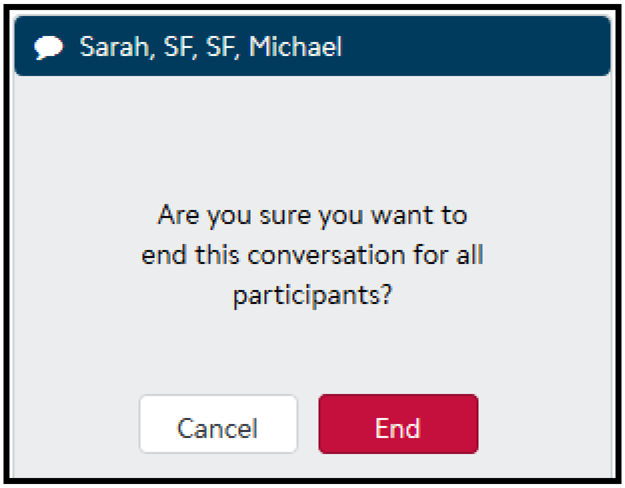


- Click **Confirm**. The names of the participants appear at the top of your chat window. The users receive an invitation. If a user declines or does not respond to your invitation, you receive a message.
- After the users accept your invitation, enter a message in the field. The chat text appears in the main window. The rest of the conversation appears below your initial message.



- To add users from the chat, click Add in the top right corner.The same menu that you used earlier to select users reappears. The current participants are shown at the top of the list.

- To end the session, click End.



- To end the session permanently, click End Conversation.
- To end the session temporarily, click Cancel and close the message. You can retrieve it later from your list of messages.

Assigning Dispositions

All incoming calls must have a disposition assigned to it based on the ***END RESULT*** of the call. Dispositions are tracked by the Operations Team in order to develop processes and procedures to reduce or eliminate certain calls.

To add a disposition, when on the call or after the call has ended and is on wrap-up time, type in the disposition you would like to assign to the in the disposition box that can be accessed through the agent dashboard.

Disposition and Definitions

Benefit Transfer Calls	Definition
Customer Confirmed Transfer Out	Customer confirmed that they have transferred their ACP service to another provider and do not wish to opt back in to acp with Assist/enTouch
Customer Requested No Contact	Customer requested to stop receiving calls regarding benefit transfer override.
Error Received - Retry	Error Received - Retry
Error Received - Unable to Transfer	Attempted to transfer the customer's ACP benefits but received an error through the tool. Advised customer that they have been de-enrolled from the program and are not able to transfer their service back to us until the program is refunded.

Opened Tier2 Ticket - Customer Complaint	Customer Complaint - Tier2 Ticket Opened
Transfer-in Completed	Customer has been successfully transferred back into the ACP Program
Transfer-in Document Sent	Customer wishes to be transferred back into ACP. BTO documentation sent but not yet completed.
Transferred to Correct Queue	Transferred the call to the correct queue
Enrollment Support Calls	**Definition**
DMD Error - Customer Not Interested in Enrolling	Customer failed CGM due to a DMD error and was not interested in enrolling for service over the phone.
DMD Error - Customer Will Attempt to Enroll in Person at a Later Time	Customer failed CGM due to a DMD error and will attempt to enroll in person at a later time.
DMD Error - Customer Will Call Back to Apply	Customer failed CGM due to a DMD error and will call back to apply.
Opened Tier2 Ticket - Customer Complaint	Customer Complaint - Tier2 Ticket Opened
Other CGM Error - Call Transferred to Correct Queue	Customer is failing CGM due to a different error, not DMD. Advised the agent that we would have to transfer them to the correct department.
Transferred to Correct Queue	Transferred the call to the correct queue
Guard Assure	**Definition**
Added Guard Assure Contract	Customer requested to add Guard Assure to their account
Cancelled Guard Assure Contract	Customer requested to remove Guard Assure from their account
Guard Assure Claim Abandoned	Customer decided not to go through with the Guard Assure claim.
Not Eligible for Guard Assure Claim	Customer was ineligible to file a Guard Assure claim due to (unpaid GA bills, GA contract less than 60 days old, already filed 2 claims, etc.)
Opened Tier2 Ticket - Customer Complaint	Customer Complaint - Tier2 Ticket Opened
Processed Guard Assure Claim	Guard Assure Claim Processed via call
Transferred to Correct Queue	Transferred the call to the correct queue
Retention	**Definition**
Customer Undecided - No Action Taken	Customer was undecided and no action was taken.
Discount Generated - Redemption Pending	Customer was retained from cancelling service by being offered a discount towards a replacement device - will claim at store/ in field.
Not Retained - Disconnected Account	Customer was unable to be retained and service was disconnected

Opened Tier2 Ticket - Customer Complaint	Customer Complaint - Tier2 Ticket Opened
Retained - Device Shipment Requested	Customer was retained from cancelling service by being offered a replacement device that will be shipped to them.
Retained - SIM Shipment Requested	Customer was retained from cancelling service by being offered a free replacement SIM Card
Tier2 Discount Generated - Redemption Pending	Agent/customer inquired about a Tier2 Discount. Ran customer through tool and provided discount amount to agent/customer.
Transferred to Correct Queue	Transferred the call to the correct queue
Sales Support	**Definition**
ACP Information Provided - No Action Taken	Agent/Customer had questions regarding the ACP Program. Info provided - No additional action taken.
ACP Opt-in SMS Sent	Customer had questions about enrolling in the ACP Program. Opt -in SMS sent to customer
Activation Issues - Troubleshooting Resolved Issue	Agent/Customer was having issues activating their new device - Troubleshooting resolved the issue.
Agent Login - Audit Suspension	Informed agent their logins have been suspended due to Audit and cannot be reactivated at this time.
Agent Login - Inactive - Advised Agent to Re-onboard	Informed agent we are unable to reactivate their current logins and they must re-onboard to receive new credentials.
Agent Login - Reset Password	The agent was provided with instructions to reset their password.
Agent Login - Unlocked	Agent's credentials were unlocked.
AVS - Educated Agent on Override Process	Provided information to agent on how to submit an AVS Override
AVS - Provided Existing Override Status Update	Provided agent with the current status of their AVS override request
Billing Inquiry - No Action Taken	Customer or agent had questions about the charges or bills on the customer's fusion account. Information was provided but no actions taken.
Billing Issue - Resolved	Corrected billing error on account
Cancelled Pending Fusion Account	Agent / Customer is requesting to cancel a Fusion account in pending status.
Carrier Outage Information Provided	Caller is inquiring about an outage with the carrier. Provided available estimated time of restoration. Informed updates will be posted on the Agent Dashboard as they become available.
CGM - Cleared Order(s)	Agent needed orders cleared out of CGM (failed NLAD orders, returning customers, DLE failures, etc)

CGM - Order Denial Explained	Agent was inquiring about the denial of their order in CGM.
CGM - Order Status Provided	Provided the status of a CGM order
CGM - Transferred Call to NaV	Agent is inquiring about an order in Pending NaV status - transferred call to NaV
CGM Order Issue - Resolved	Agent was having issues with a CGM order - Issue was resolved.
Courtesy Data Added	Added courtesy data to customer's account
Courtesy Text Added	Added courtesy text to customer's account
Courtesy Voice Added	Added courtesy voice to customer's account
Data Not Working - Troubleshooting Resolved Issue	Customer is unable to use Data services - Troubleshooting resolved issue
Drop-Ship Request - Prestamped Envelope	Submitted dropship request for a prestamped envelope
Drop-Ship Request - Replacement Device	Submitted dropship request for a replacement device, batteries, chargers, etc
Drop-Ship Request - Replacement Part(s)	Submitted dropship request for a replacement part (batteries, chargers, etc)
Inventory Made Available	Inventory made available for use
Inventory Preactivated	Preactivated inventory for agent
Inventory Transferred	Inventory transferred from one agent ID to another.
NaV Outage	Provided information on outage and provided estimated restoration time.
NLAD Outage	Provided information on outage and provided estimated restoration time.
Number Porting - Error Resolved	Number porting error resolved
Number Porting - Ticket Opened	Number porting error - Tier2 ticket opened
Opened Tier2 Ticket - Billing Issue	Unable to correct billing error on customer account; opened Tier2 ticket and advised caller that this should be resolved in 1-2 business days.
Opened Tier2 Ticket - CGM Order Issue	Unable to resolve the CGM order issues. Opened Tier2 ticket and advised agent that we will call back with an update once we've received one.
Opened Tier2 Ticket - Customer Complaint	Customer Complaint - Tier2 Ticket Opened
Opened Tier2 Ticket - Dashboard Tool Error	Agent is experiencing issues with any of the Dashboard Tools (ACP tool, retention calc., ACP tablet tool, GA tool, etc.) Tier2 ticket submitted.
Opened Tier2 Ticket - Data Not Working	Unable to resolve the data issue on the device. Opened Tier2 Ticket and advised caller that we will provide them with an update once we receive one.
Opened Tier2 Ticket - Text Not Working	Unable to resolve the text issue on the device. Opened Tier2 Ticket and advised caller that we will provide them with an update once we receive one.

Opened Tier2 Ticket - Voice Service Not Working	Unable to resolve the voice service issues. Opened Tier2 ticket and advised agent that we will call back with an update once we've received one.
Payment Processed	Processed payment on behalf of the agent or customer.
Prepaid to Lifeline Transaction Processed	Processed Prepaid to Lifeline swap due to agent unable or unwilling to process transaction on dashboard.
Promotion Process Provided	Agent inquired about how to redeem the current promotion for the customer. Provided details to agent.
PUK Code Provided	Customer/Agent called to obtain the PUK code for the customer's device.
Purchased Top-Up	Purchased top up using CC or account credit
Recertification Inquiry - Transferred to State or USAC	Customer / Agent was inquiring about the recertification process.
Reverification Inquiry - Transferred to NaV	Customer / Agent was inquiring about the reverification process.
Service Balance Provided (Talk/Text/Data)	Provided remaining talk, text or data balances.
Shipment Status Provided	Customer requested the status of their shipment (replacement device, web enrollment order, Pre-stamped envelope, etc.)
Suspended Account	Fusion account suspended per customer request
Swap - LYP	Processed LYP IMEI / SIM swap
Swap - MDN	Processed phone number change
Swap - SIM Only	Processed SIM only swap
Text Not Working - Troubleshooting Resolved Error	Customer is unable to send or receive text messages. Did troubleshooting steps and service was restored.
Transferred to Correct Queue	Transferred the call to the correct queue
Unauthorized User - No Action Taken	Caller is not the account holder or an unathorized user - no info provided
Unsuspended Account	Fusion account unsuspended per customer request
Voice Service Not Working - Troubleshooting Resolved Issue	Customer was unable to make or receive calls. Troubleshooting resolved issue.
Voicemail Reset Processed	Processed voicemail reset for customer
Warranty Swap Completed - Activation Issues	Agent/Customer was having issues activating their new device - Warranty swap was completed.
Warranty Swap Completed - Data Not Working	Agent/Customer was having issues with their data services - Warranty swap was completed.
Warranty Swap Completed - Multiple Service Issues	Agent/Customer was having multiple service issues - Warranty swap was completed.

Warranty Swap Completed - Text Not Working	Agent/Customer was having issues with their text messages - Warranty swap was completed.
Warranty Swap Completed - Voice Service Not Working	Agent/Customer was having issues with their voice service - Warranty swap was completed.
Web Enrollment	**Definition**
Web Enrollment - Order Status Provided	Provided customer with the status of their online application.
Web Enrollment - Shipment Status Provided	Customer enrolled online - provided status on their shipment
Web Enrollment - Application Assistance Provided	Assisted the customer with their online application
Transferred to Correct Queue	Transferred the call to the correct queue
Opened Tier2 Ticket - Customer Complaint	Customer Complaint - Tier2 Ticket Opened

Scripts

The following responses should be used to greet, confirm completion and close the chat.

- Greeting - All AR reps will have a canned greeting that should be sent immediately after opening a new chat. To send your greeting, type in your name, select the message and click "Enter"
  - "Hi! This is (agents name). One moment while I process your request."
- Confirmation of completion- All AR reps will have a canned note that should be sent immediately after completing the request. To send your closing, type in "Done", select the message and click "Enter"
  - "This has been completed. Is there anything else I can assist you with?"
- Closing - Once you have sent the confirmation note to the store/agent on chat and they have not responded within two to three minutes you would need to send the closing canned response. To send your closing, type in "Close", select the message and click "Enter" and then exit the chat.
  - "Since there has been no response, I will close the chat. Let us know if there is anything else we can do for you!"

Agent Dashboard

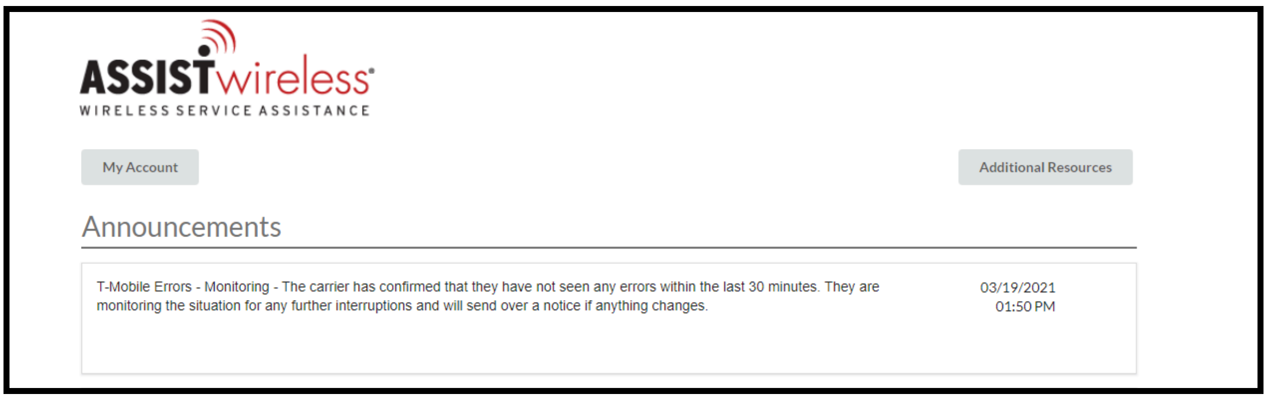
The Agent Dashboard is an information management website that Assist Wireless and enTouch Wireless provides to Sales Agents as a one-stop shop, allowing instant access to the latest announcements regarding systems and outages, procedures and new promotions. In addition, the dashboard will house many of the tools and systems Sales Agents are familiar with.

Note: For the Sales support team, you will receive one set of credentials that will allow you to log in to either instance of the Agent Dashboard.

- Assist Wireless
  - https://www.awagentdashboard.com/
- enTouch Wireless
  - https://entouch-dashboard.myagentdashboard.com/

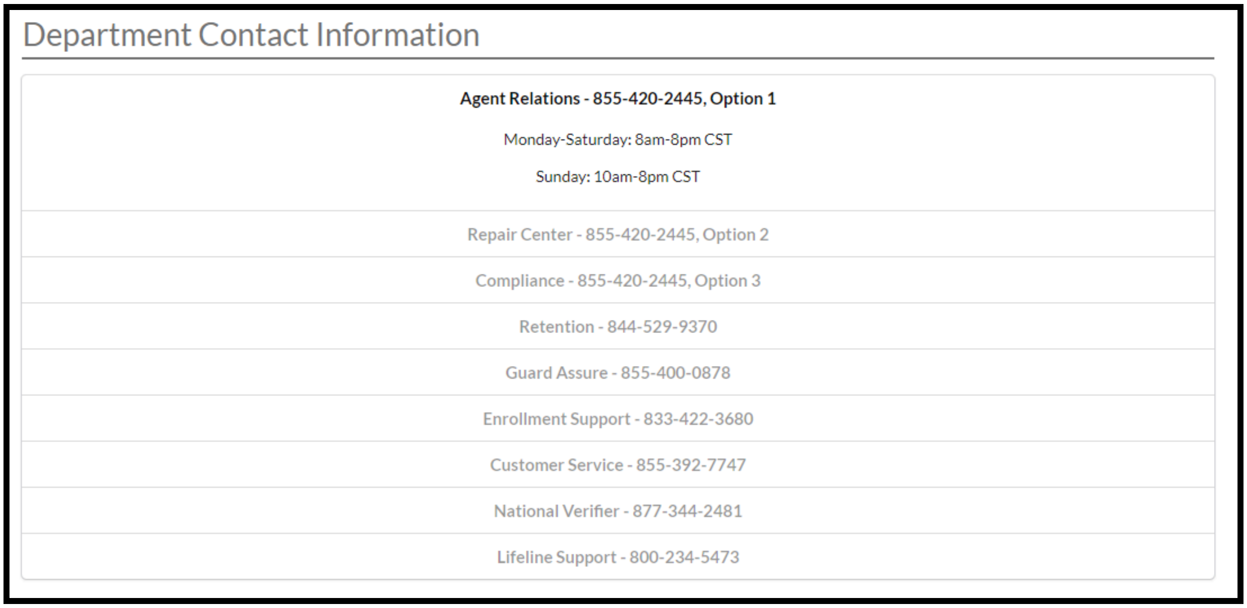
Announcements

When first logging into the dashboard, the first section to appear are the announcements. This is where all outages, system issues and any lifeline updates are posted.



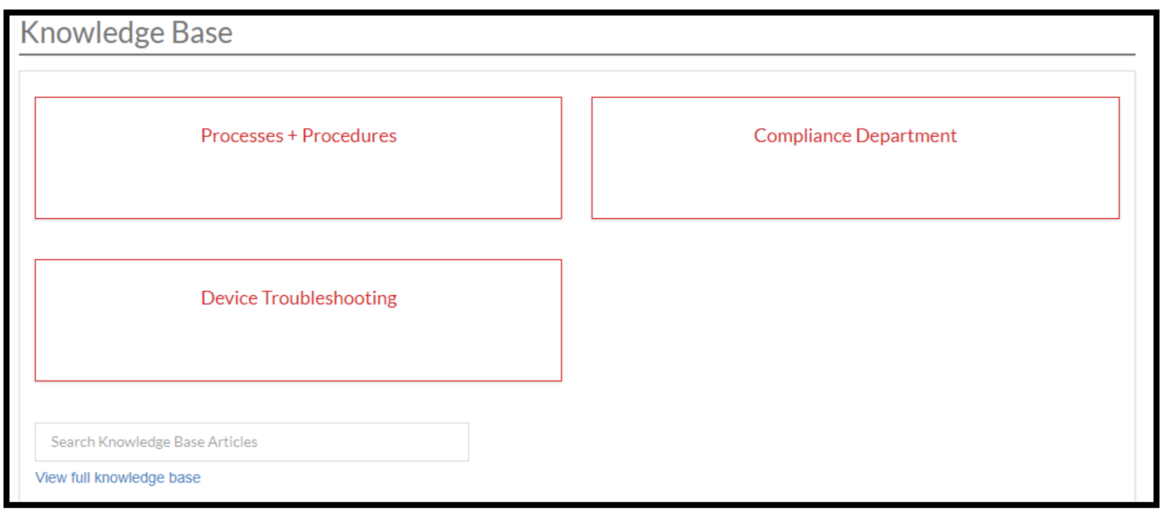
Department Contact Information

The department contact information and hours of operation can be found by expanding the menu or clicking on the name of the department.



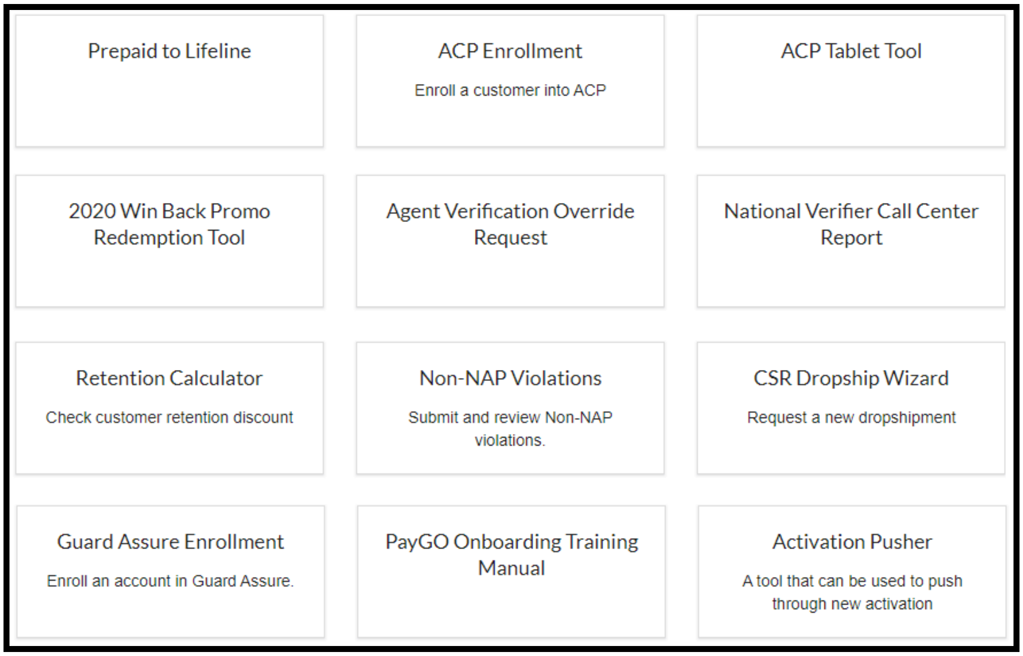
Knowledge Base

The knowledge base contains links to processes, procedures, compliance policies and device troubleshooting.



Dashboard Tools

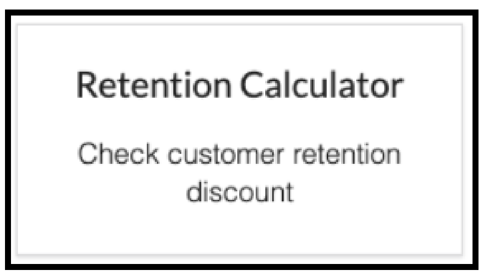
The tool section of the dashboard consists of various tools depending on the user's permissions to assist in processing transactions.



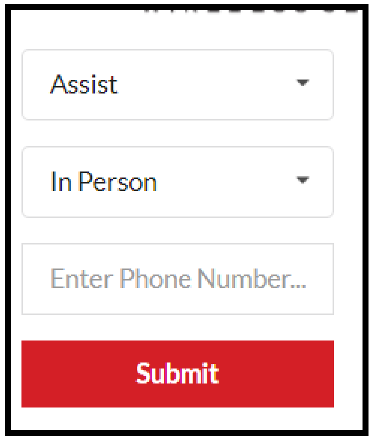
Retention Calculator

The retention calculator is used by the field and Retention team to determine if a customer qualifies for a discount towards a replacement device to be used as a retention tactic in the event that they are wanting to disconnect their service.

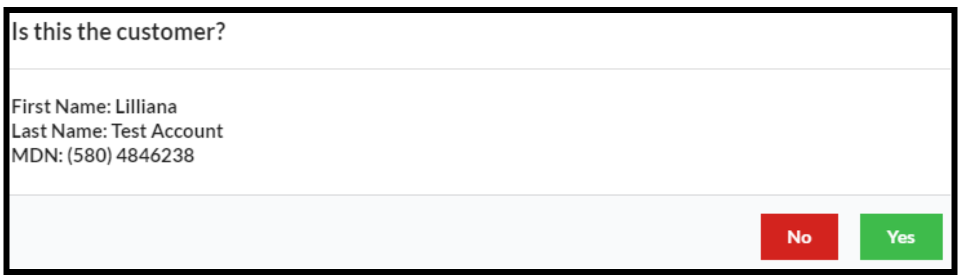
1. Click the [Retention Calculator] button



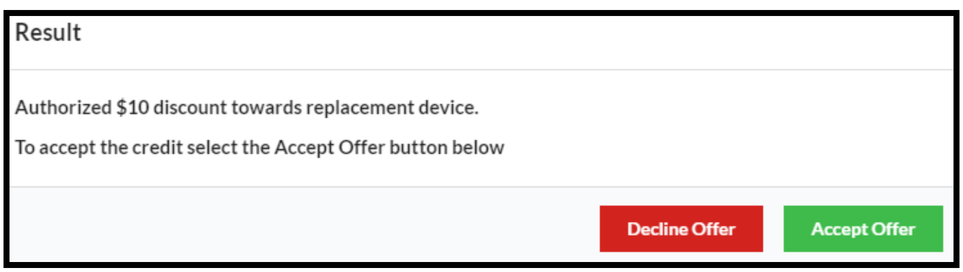
3. Enter the customer's phone number and click [Submit]



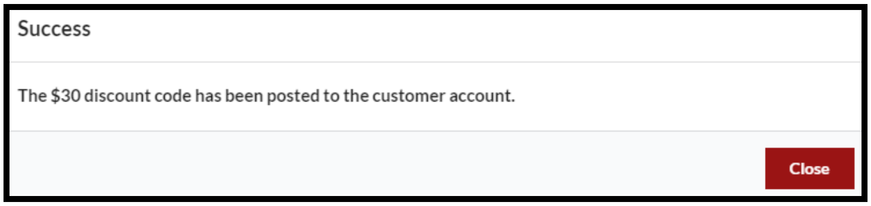
4. Verify the information is for the correct customer
    a. If Yes, click [Yes]
    b. If No, click [No] to go back and enter the correct information

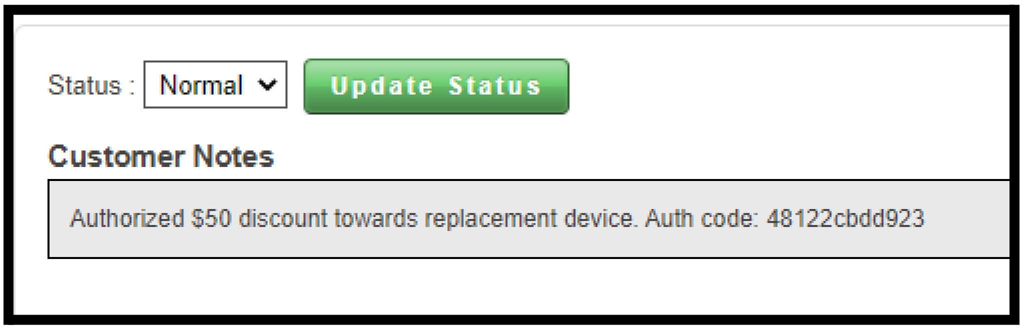


5. The discount will generate



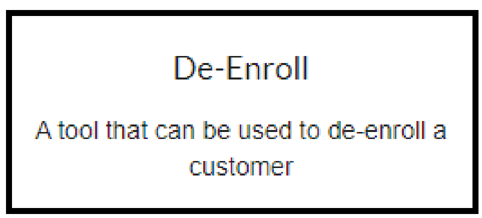
    a. If the customer accepts the offer, click [Accept Offer]
        i. The discount code will be posted to the customer's account. Provide options on how the offer can be redeemed.





De-Enroll Tool
The De-Enroll tool is used to clear customer information from NLAD when they are attempting to sign up for service but have a previously closed account that is causing issues.

1. Click the [De-Enroll] button



2. Enter the Fusion Account Number, CGM order number and Customer's Phone Number associated with the disconnected account and click submit.

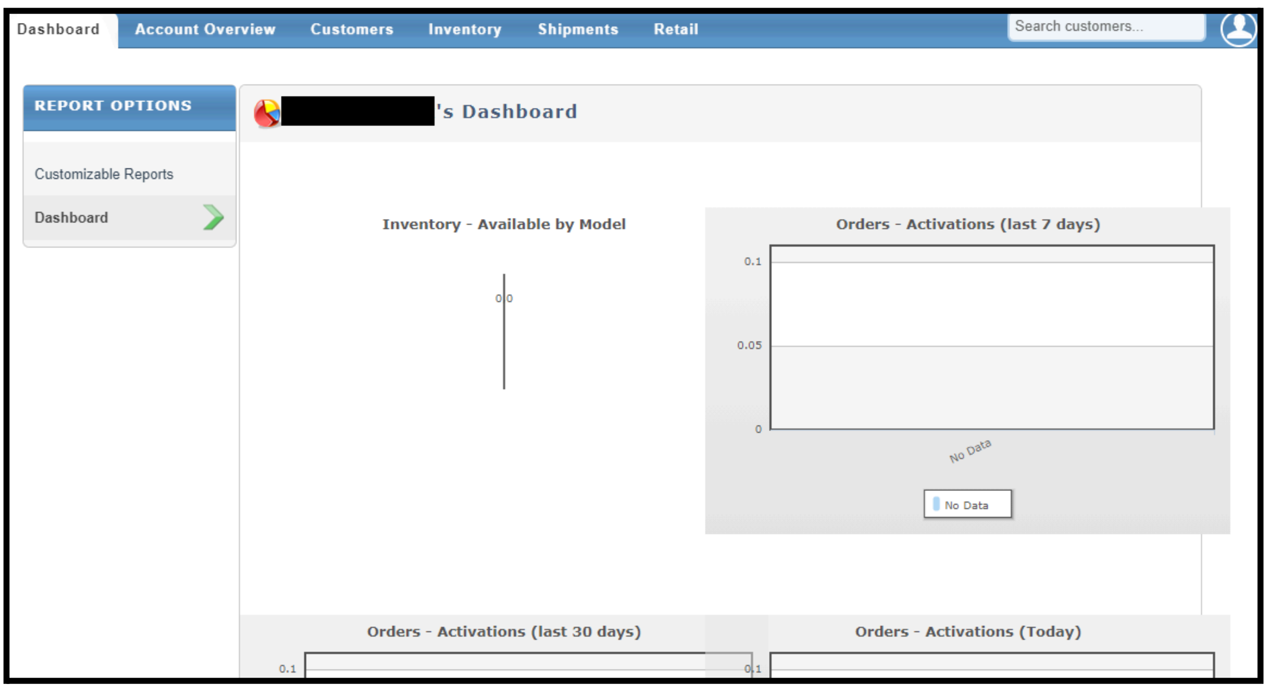
3. You should receive a message confirming if the de-enroll was successful. If an error occurs, Please open a ticket with the Senior Sales Support team via Asana.

Fusion

This is the retail platform that is utilized at the store level. This CSR system is typical of what you would find in a retail store or customer service environment. Functionalities for field agents and store employees are limited to avoid unauthorized transactions. The Sales Support Team has unrestricted access to Fusion to allow us to perform more detailed maintenance to all accounts.

https://assist.telcoprovider.com

Fusion Dashboard

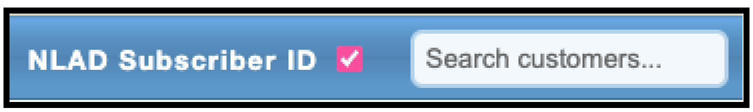


After successfully logging in you will be taken to your Fusion dashboard page. The Dashboard tab in Fusion includes a customizable home page, as well as a reporting module. You can view reports such as customer activations, available inventory, etc.

Searching Accounts

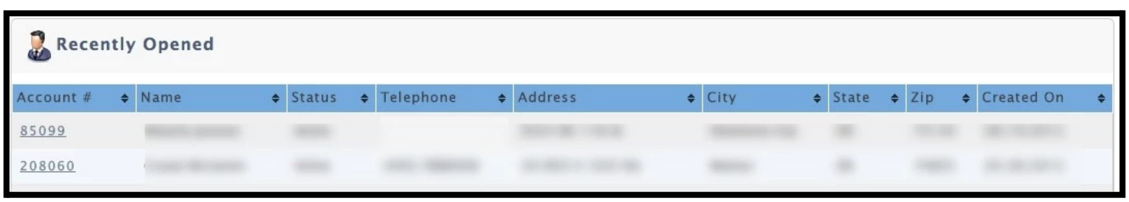
You can search for a customer using the search box in the top right corner. Customers can be searched by:

- First and Last Name
- Telephone Number
- Account Number
- NLAD Subscriber ID
    - Check the box next to [NLAD Subscriber ID] when searching for a customer using the sub ID



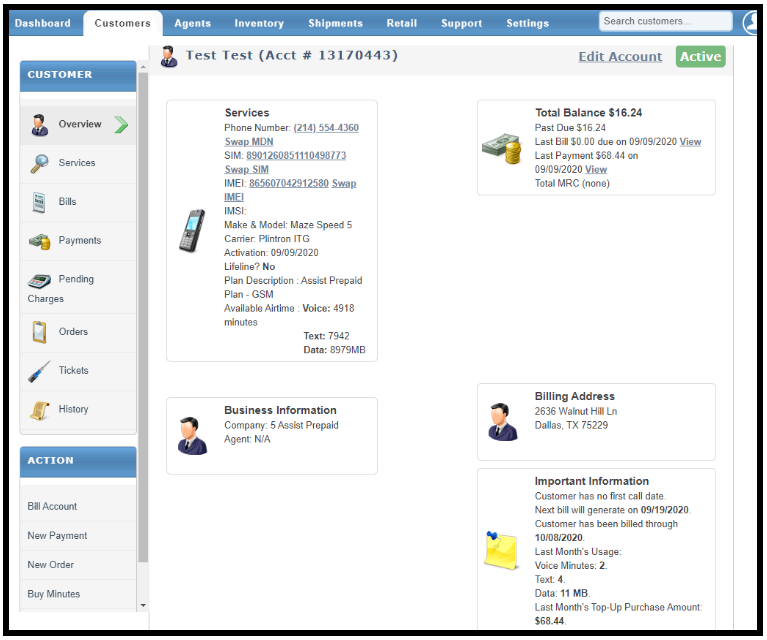
- ESN
- Last Name and last 4 of SSN

Customers Tab



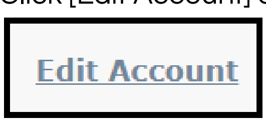
The [Customers] tab displays a list of recently opened accounts:

Account Overview



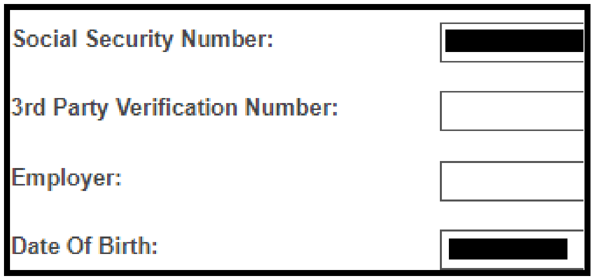
Once you click on a customer's account number, you will see basic information including the following:

- Customer's Name
- Telephone Number
- Account Creation Date
- Total Balance
- Billing Address
- Type of Account (Lifeline or Prepaid)
- Handset Information
- Plan Information
- Carrier
- Remaining minutes/text/data
    a. ***NOTE: Customer's personal information such as DOB and last 4 digits of SSN will no longer be displayed on the overview page. You can access this information by following the steps below:***
        1. Click [Edit Account] on the top right corner



        2. Select [Personal]

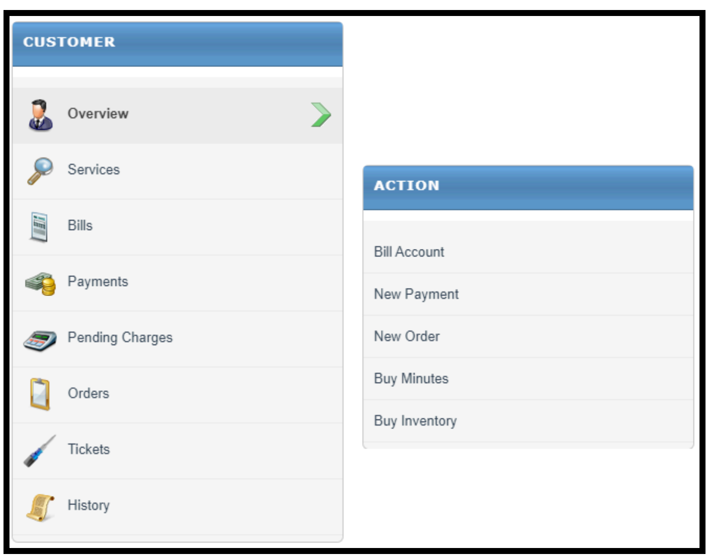
3. Customer's DOB and Last 4 of SSN will be listed here



Account Statuses

Customer / Action Menus

From these menus you will be able to view/make actions such as viewing detailed services, bills payments, pending charges, orders, tickets, account history, adding a new bill, payment, and buying minutes or inventory.



CDT - Guard Assure

The CDT or Call Disposition Tracker is used to obtain Guard Assure claim numbers.

Link: https://saycarramrod.com/

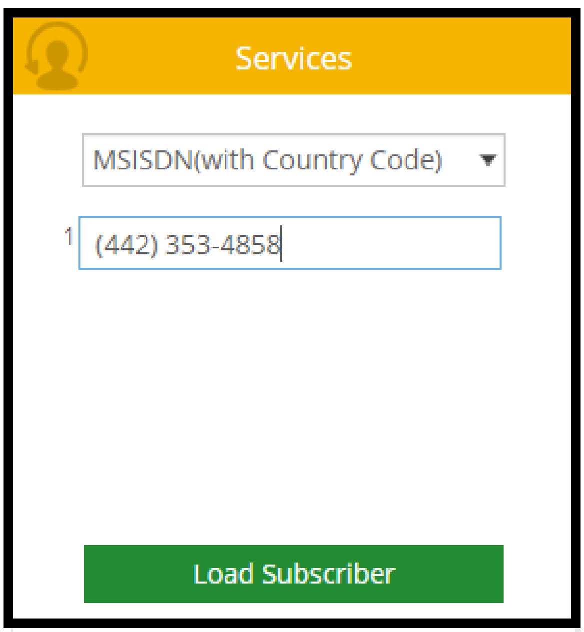
Plintron CRM

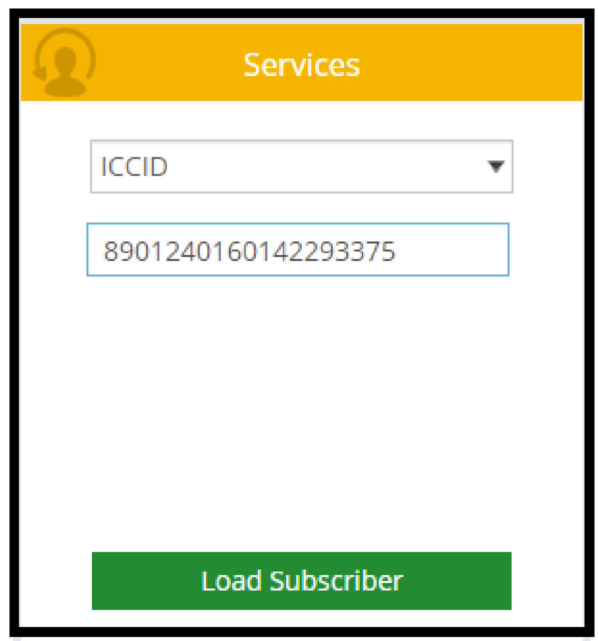
The Plintron CRM application helps the MVNO Customer Service Representative to resolve the issues of their subscriber's over-call.

Link: https://assistcrm-us.plintron.com/

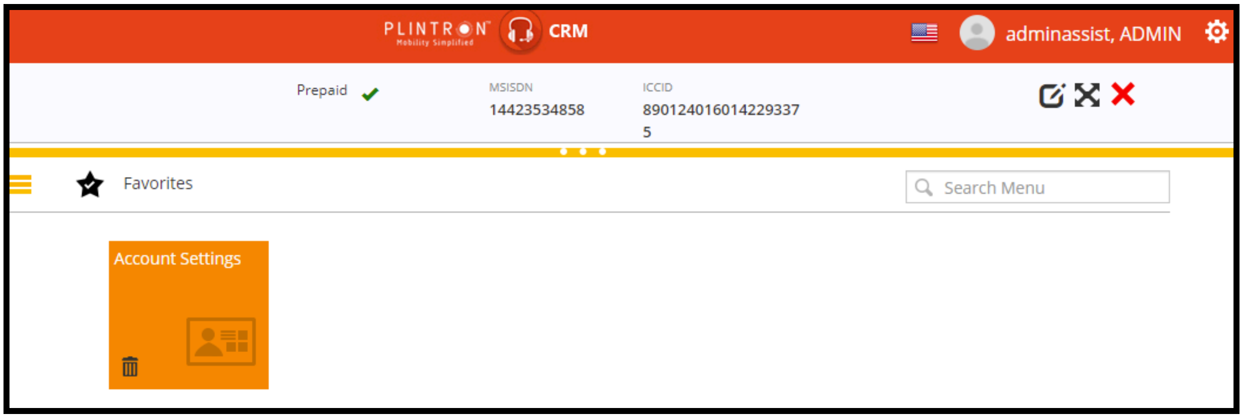
How to Search for a Customer

1. Logs into Plintron CRM.
2. In the Plintron CRM landing page, under Services, Enter the Customer's MSISDN (Phone Number) or ICCID (SIM Number) and click [Load Subscriber]



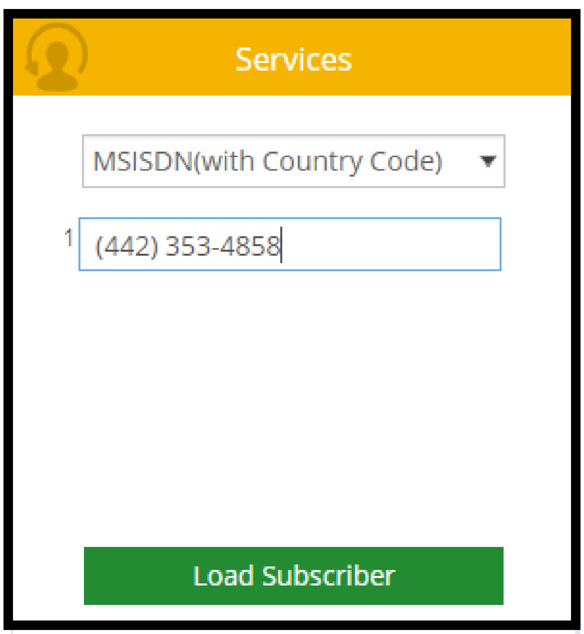


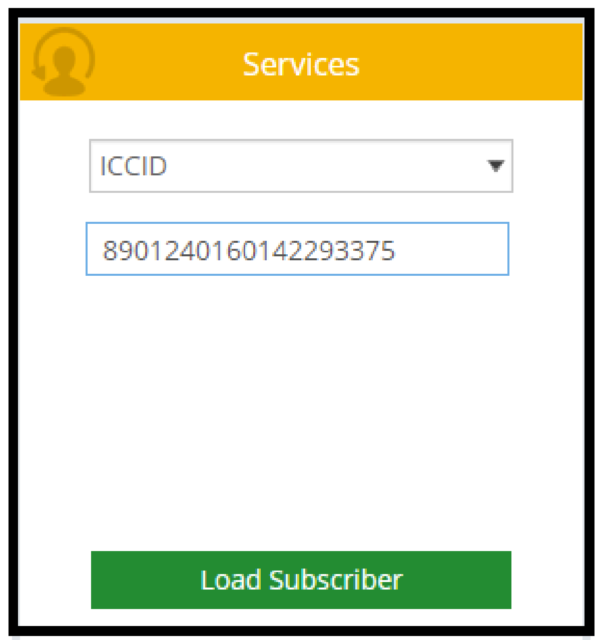
3. Once the customer is located the below screen will appear



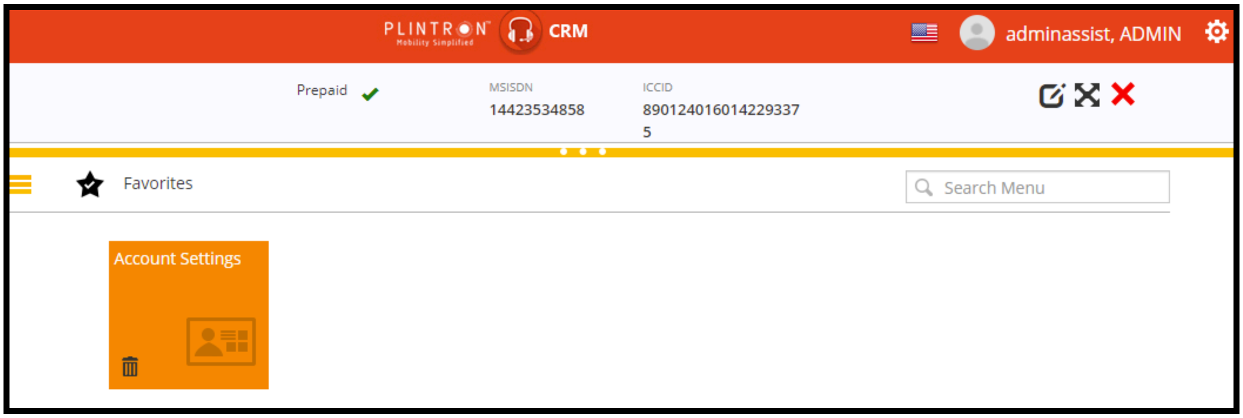
How to View the Customer's Plan, Reload Dates, Minute Balances

1. Logs into [Plintron CRM]().
2. In the Plintron CRM landing page, under Services, Enter the Customer's MSISDN (Phone Number) or ICCID (SIM Number) and click [Load Subscriber]

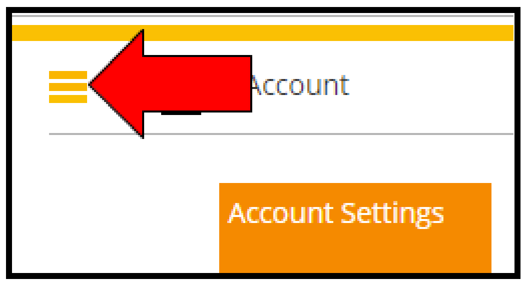




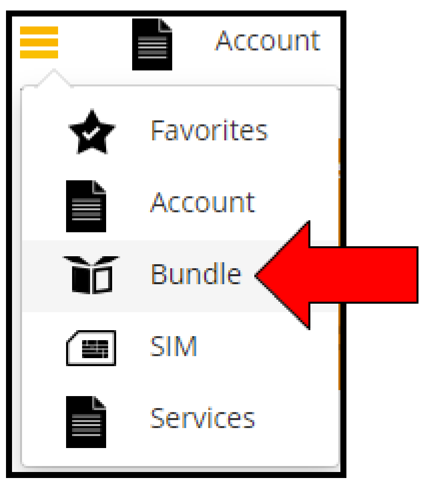
3. Once the customer is located the below screen will appear



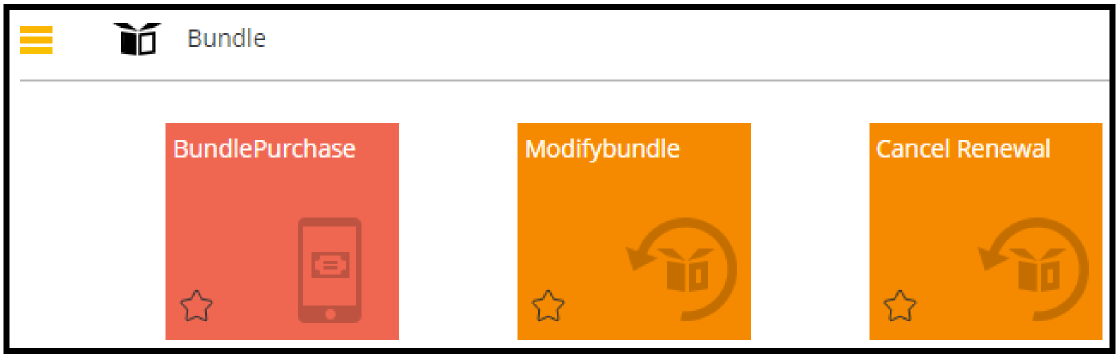
4. Click on the Menu Icon



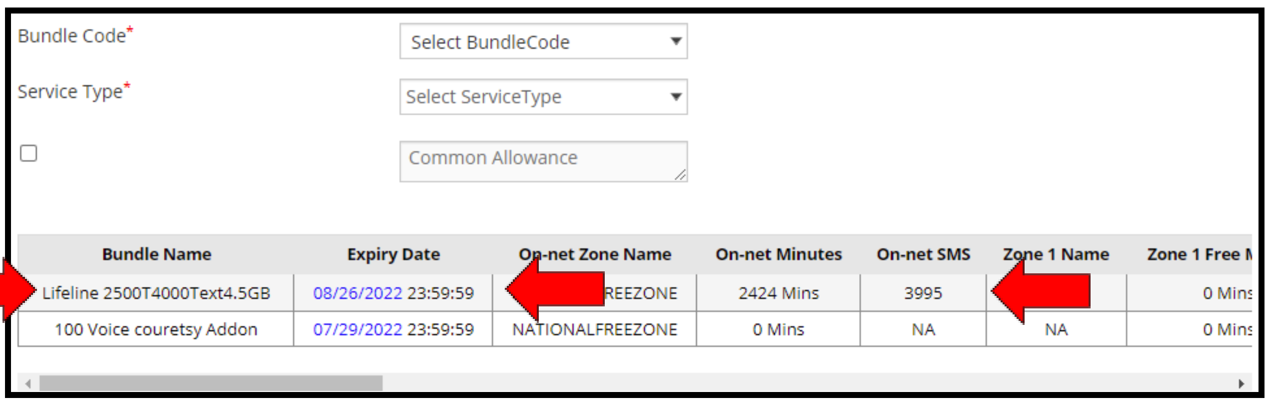
5. Select [Bundle] from the menu

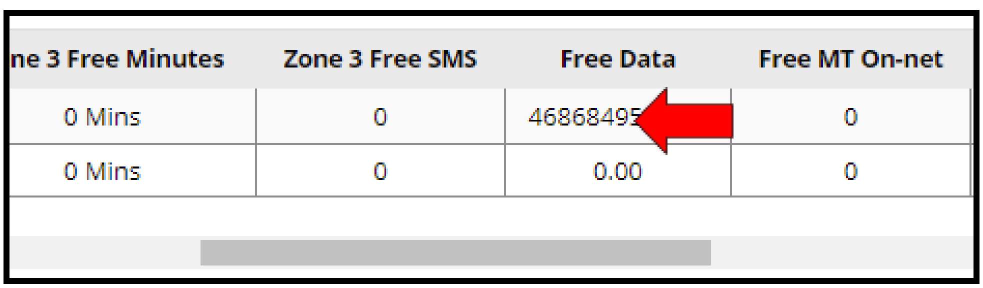


6. Select [Modify Bundle]



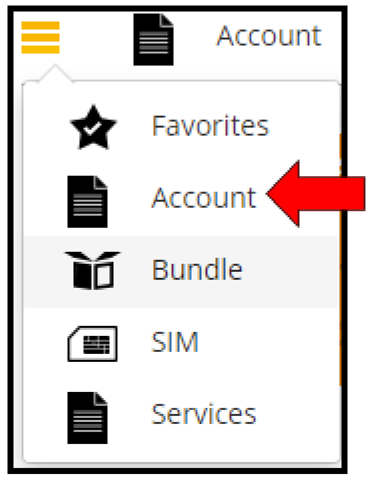
7. The following screen will show you the current monthly Bundle Name as well as any addons on the customer's account, the Expiration Date (next reload date) and Talk, Text and Minute Balances.



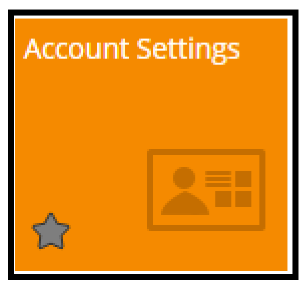


PUK Codes

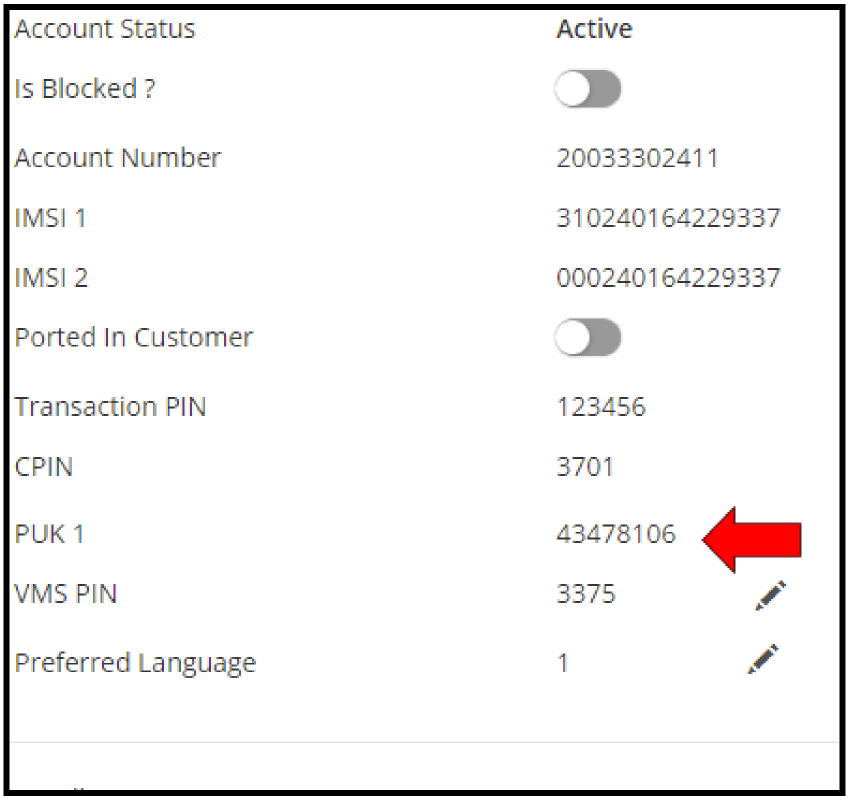
1. Logs into Plintron CRM.
2. In the Plintron CRM landing page, under Services, Enter the Customer's MSISDN (Phone Number) or ICCID (SIM Number) and click [Load Subscriber]
3. Click [Account]



4. Click [Account Settings]

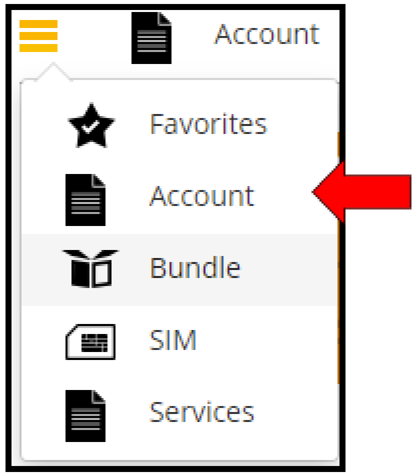


5. Provide the PUK code to the customer or click against the PUK 1 field to send SMS of the PUK code. The SMS will be sent to the subscriber's MSISDN.

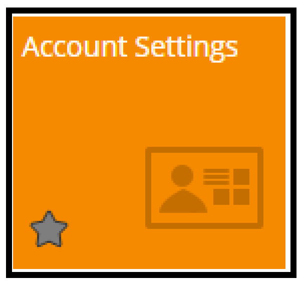


Changing/Resetting Voicemail Password

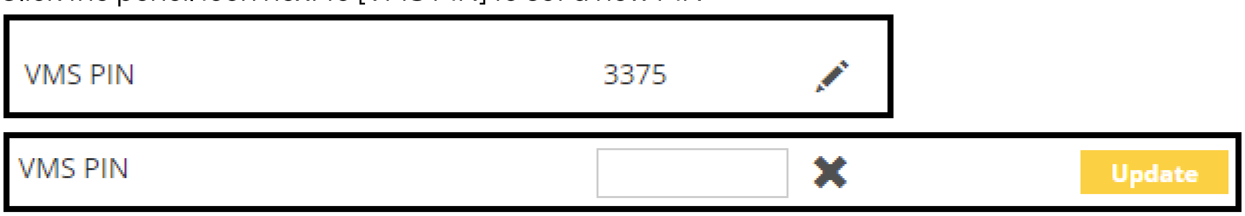
1. Logs into Plintron CRM.
2. In the Plintron CRM landing page, under Services, Enter the Customer's MSISDN (Phone Number) or ICCID (SIM Number) and click [Load Subscriber]
3. Click [Account]



4. Click [Account Settings]



5. Click the pencil Icon next to [VMS PIN] to set a new PIN



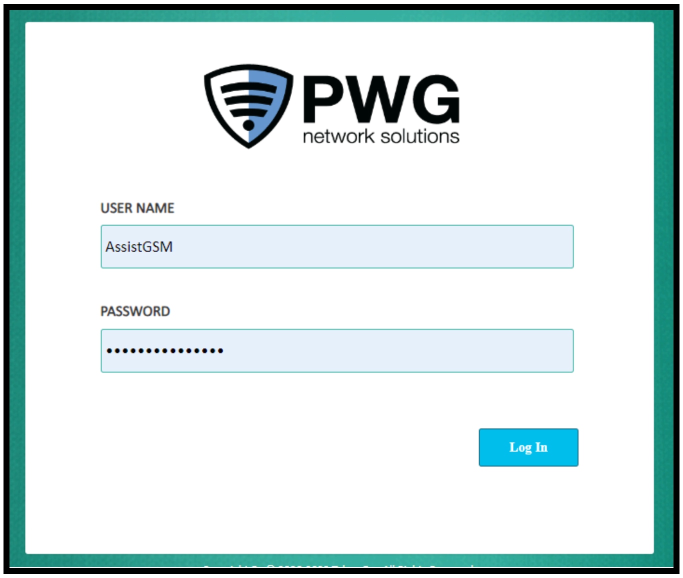
CSM - Customer Support Manager

This system is used to verify if enTouch Wireless customers have the ability to make International calls. NOTE: International calling is only available to enTouch Wireless customers in Fusion.

Link: [CSM - Customer Support Manager Ver. 2.0]

PWG MVNO - Telgoo 5

Telgoo 5 is the MVNO or carrier side for Prepaid Wireless Group customers. We have different credentials for our different brands, Assist Wireless, enTouch and Safetynet.

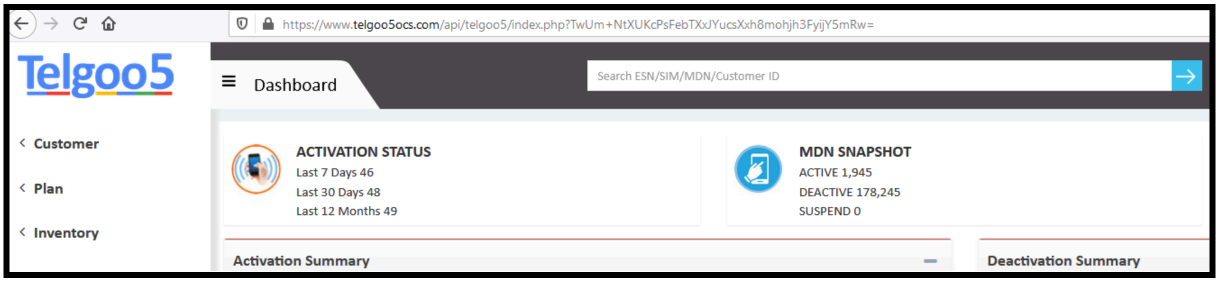


Link:
https://www.telgoo5ocs.com/api/telgoo5/index.php?TwUm+NtXUKcPsFebTXxJYucsXxh8mohjh3FyijY5mRw=

Company	Username	Password
Assist Wireless	AssistGSM	ZJBT5MNSPNWDC3Y
enTouch Wireless	Tier2Via1	r¤maª!~§+n
Safetynet Wireless	Safetynet	7CG8PXOIGWNUC1X

Locating Customer Accounts

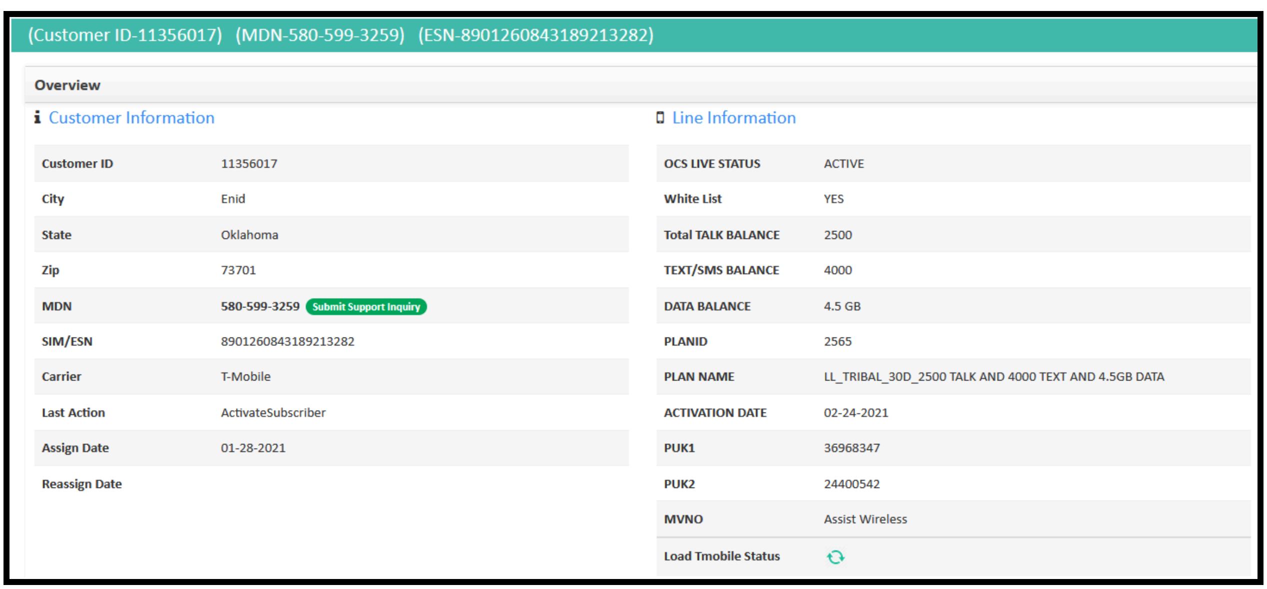
Customers can be searched by SIM, phone number or customer ID



Overview

The customer profile will include the customer information as well as the line information including the following

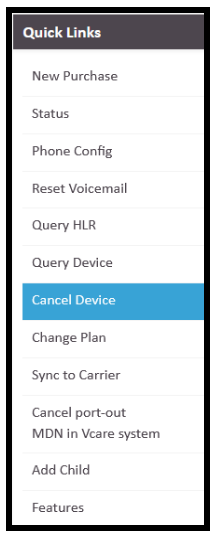
- Customer ID
- Status
- MDN
- Total Talk, Text & Data balances
- Plan ID
- Plan Name
- Activation Date
- PUK Codes



Quick Links

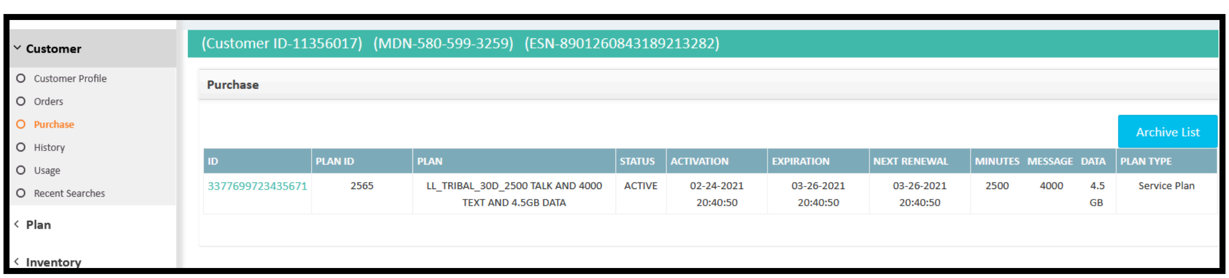
From this menu you will be able to perform the following processes

- New Purchase
- Reset Voicemail
- Query HLR
- Query Device
- Cancel Device
- Change Plan
- Sync with Carrier



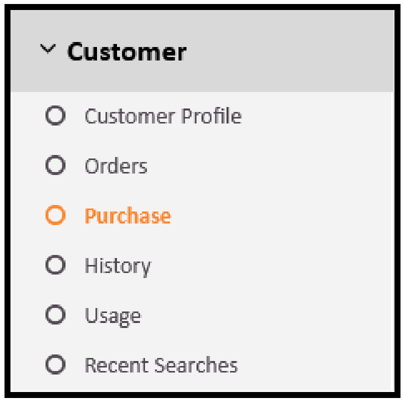
Purchase Tab

The purchase tab is where you can view all of the customers active purchases including the monthly plan. You can also view or cancel purchases from here.



How to view Customers Next Monthly Reload

1. Log in to the PWG MVNO
2. Search for the customer using the MDN, SIM or customer ID number
3. Select Purchase under the Customer Tab



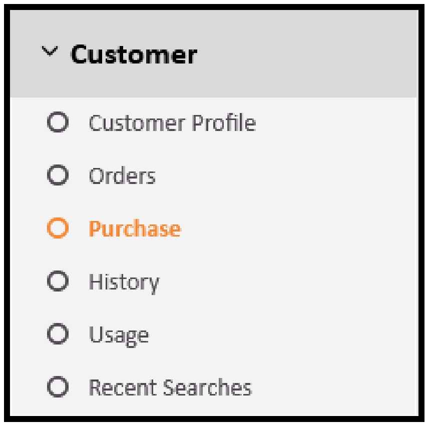
4. Locate the monthly plan based on the Plan description. You will be able to find the following information
    a. Status
    b. Activation
    c. Expiration
    d. Next Renewal
    e. Remaining Minutes, Messages & Data

PLAN
LL_TRIBAL_30D_2500 TALK AND 4000 TEXT AND 4.5GB DATA

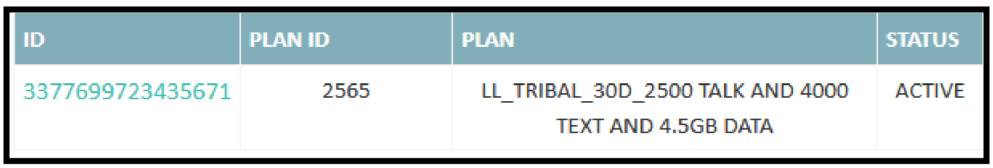
ID	PLAN ID	PLAN	STATUS	ACTIVATION	EXPIRATION	NEXT RENEWAL
3377699723435671	2565	LL_TRIBAL_30D_2500 TALK AND 4000 TEXT AND 4.5GB DATA	ACTIVE	02-24-2021 20:40:50	03-26-2021 20:40:50	03-26-2021 20:40:50

How to Cancel a purchase

1. Log in to the PWG MVNO
2. Search for the customer using the MDN, SIM or customer ID number
3. Select Purchase under the Customer Tab

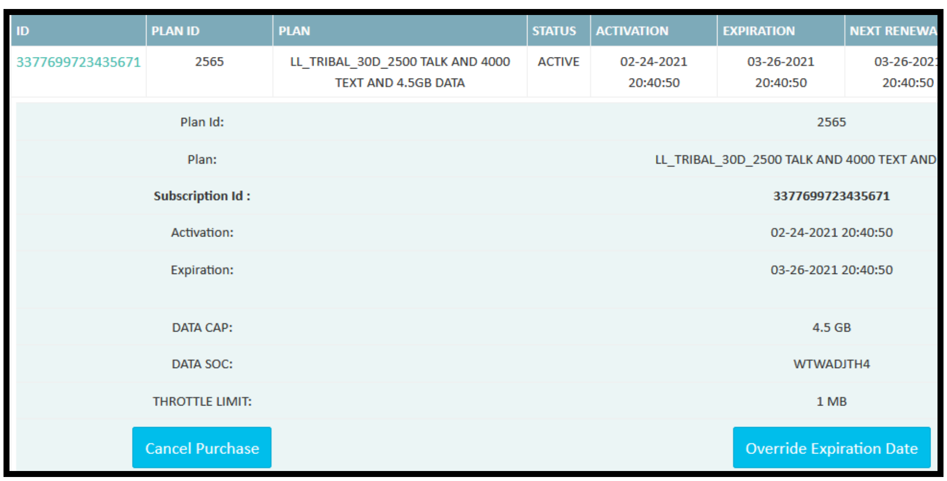


4. Locate the purchase you need to cancel and click the ID



ID	PLAN ID	PLAN	STATUS
3377699723435671	2565	LL_TRIBAL_30D_2500 TALK AND 4000 TEXT AND 4.5GB DATA	ACTIVE

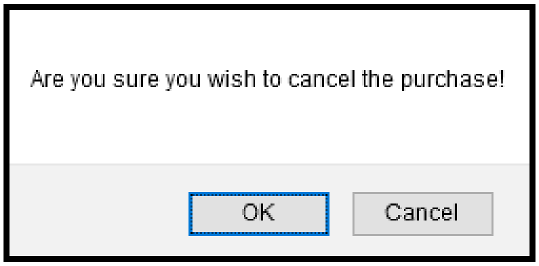
5. Select Cancel Purchase



ID	PLAN ID	PLAN	STATUS	ACTIVATION	EXPIRATION	NEXT RENEWA
3377699723435671	2565	LL_TRIBAL_30D_2500 TALK AND 4000 TEXT AND 4.5GB DATA	ACTIVE	02-24-2021 20:40:50	03-26-2021 20:40:50	03-26-202 20:40:50

Plan Id:	2565
Plan:	LL_TRIBAL_30D_2500 TALK AND 4000 TEXT AND
Subscription Id :	**3377699723435671**
Activation:	02-24-2021 20:40:50
Expiration:	03-26-2021 20:40:50
DATA CAP:	4.5 GB
DATA SOC:	WTWADJTH4
THROTTLE LIMIT:	1 MB

6. A pop up will appear asking you to confirm if you'd like to cancel the purchase. Click OK to continue or Cancel to go back.



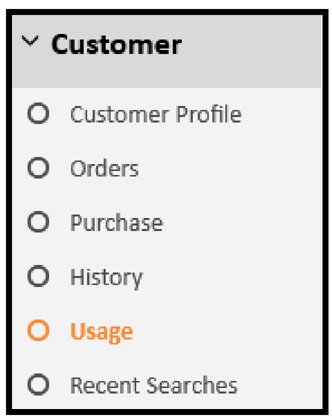
7. The purchase is now voided.
    a. If the purchase was added by mistake you or the agent can now process the correct purchase.

Usage Tab

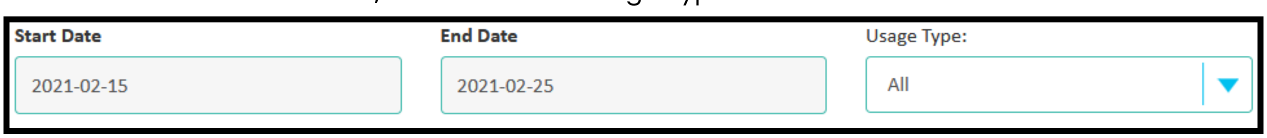
From the Usage tab you will be able to view the customers usage and filter by dates or usage type as well as download the customers usage report.

How to View Usage

1. Log in to the PWG MVNO
2. Search for the customer using the MDN, SIM or customer ID number
3. Select Usage under the Customer Tab

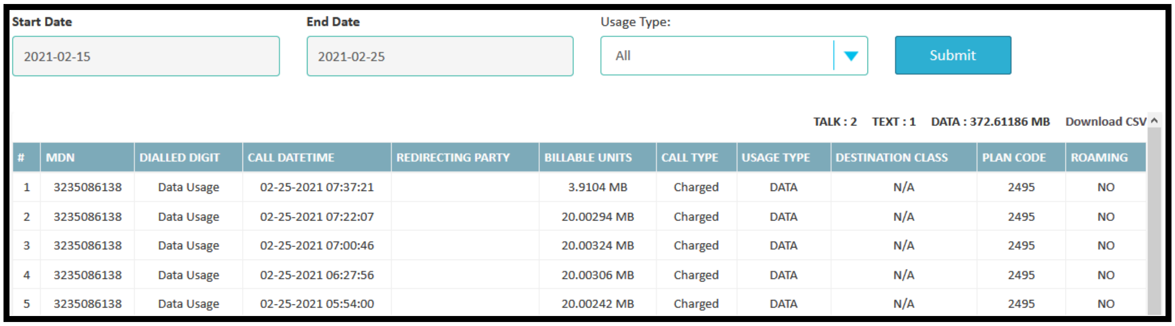


4. Select the desired Start Date, End Date and Usage Type



5. Click Submit

6. A list will appear displaying the usage and an option to download the information.



#	MDN	DIALLED DIGIT	CALL DATETIME	REDIRECTING PARTY	BILLABLE UNITS	CALL TYPE	USAGE TYPE	DESTINATION CLASS	PLAN CODE	ROAMING
1	3235086138	Data Usage	02-25-2021 07:37:21		3.9104 MB	Charged	DATA	N/A	2495	NO
2	3235086138	Data Usage	02-25-2021 07:22:07		20.00294 MB	Charged	DATA	N/A	2495	NO
3	3235086138	Data Usage	02-25-2021 07:00:46		20.00324 MB	Charged	DATA	N/A	2495	NO
4	3235086138	Data Usage	02-25-2021 06:27:56		20.00306 MB	Charged	DATA	N/A	2495	NO
5	3235086138	Data Usage	02-25-2021 05:54:00		20.00242 MB	Charged	DATA	N/A	2495	NO

7. Select [Download CSV] if you'd like to download the usage report

MVNO Connect - Telgoo 5

Telgoo 5 is the MVNO or carrier side for MVNO Connect (enTouch) and MVNO - C (Panda Mobile) . We have different credentials for customers accounts created by enTouch agents and for those created by Panda Mobile Agents.

Link:
https://mvnoconnect.telgoo5.com/api/telgoo5/index.php?TwUm+NtXUKcPsFebTXxJYucsXxh8mohjh3FyijY5mRw=

Panda Mobile Agents ONLY
Username: paula
Password: &My@6EWi

All other enTouch Agents
Username: enTouch.Wireless
Password: COzevUw=3r$

See How to Check Data Reload

Lifeline Plans

Plan offerings vary by Company, State and Tribal designation and are subject to change.

Assist Wireless Plans

enTouch Wireless Plans

**Note: Beginning December 4th, 2023 enTouch Wireless will begin offering service in Oklahoma.*

Lifeline Plans		
Plan Description	**Designation**	**Price**
Unlimited Talk & Unlimited Text + 6GB	Tribal	FREE
Unlimited Talk & Unlimited Text + 6.5GB	Tribal	$1.00
Unlimited Talk & Unlimited Text + 7.5GB	Tribal	$5.00
Unlimited Talk & Unlimited Text + 4.5GB	Tribal	FREE
1000 Talk & Unlimited Text + 100mb	Non-Tribal	FREE
300 Talk/300 Text/4.5GB	Non-Tribal	FREE
500 Talk/500 Text/4.5GB	Non-Tribal	$1.00
1000 Talk/1000 Text/4. 5GB	Non-Tribal	$5.00
1500 Talk/1500 Text/4.5GB	Non-Tribal	$10.00
Unlimited Talk/Text/6GB	Non-Tribal	$25.00
Unlimited Talk/Text/6.5GB	Non-Tribal	$26.00
Unlimited Talk/Text/7.5GB	Non-Tribal	$30.00
Unlimited Talk/Text/4. 5GB	Non-Tribal	$25.00
Unlimited Talk/Text/5GB	Non-Tribal	$26.00
Unlimited Talk/Text/6GB	Non-Tribal	$30.00

California Lifeline Plans		
Plan Description	**Designation**	**Price**
Unlimited Talk & Unlimited Text + 8GB	Tribal	FREE
Unlimited Talk/Text/6GB	Non-Tribal	FREE
Texas Lifeline Plans		
Plan Description	**Designation**	**Price**
Unlimited Talk/Text/4.5GB	Tribal	FREE
1000 Talk/500 Text/100mb	Non-Tribal	FREE

Phone Pricing

*Effective TBD our inventory prices will be updated. This update aims to decrease the retail price of some devices. Additionally, to align processes and systems, the Retention Calculator will be updated to cap the max discount at $45.

- Current $65 and $50 devices will be updated to $45
- New Non Tribal customers may continue to receive the new $45 lifeline phone for $30
- Retention discount will be capped at $45 (currently $65)

Current Inventory Type	Old Retail Price	NEW Retail Price	Price for new Tribal Customers	Price for new Non-Tribal Customers
5.5” $65 Phone - IMEI (Broadband)	$65	$45	$0	$30
6” $65 Phone - IMEI (Broadband)	$65	$45	$0	$30
$50 Phone - IMEI (Broadband)	$50	$45	$0	$30
$10 AST Upgrade 2022	$75	$75	$10	$60
$20 AST Upgrade 2022	$85	$85	$20	$70
$60 Upgrade Device	$125	$125	$60	$110
$100 AST Upgrade 2022	$165	$165	$100	$130
$25 iPhone Holiday Promo	$90	$90	$25	NA

Operational Procedures

Here you will find a list of the many different inquiries the Sales Support teams receive from the field. These procedures can always change depending on business needs, new processes assigned to our department, and other operational integrations.

Updating Customer Account Information

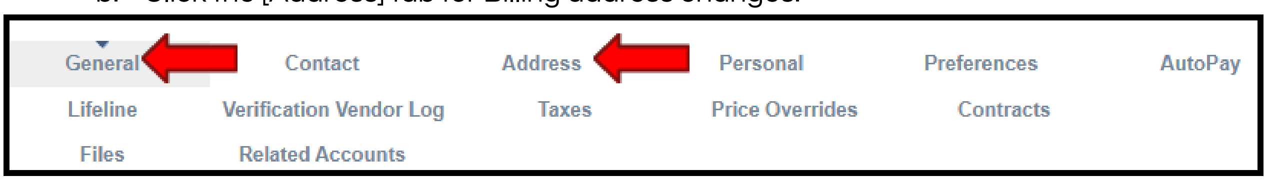
Agents / Customers will request you to assist them in updating a customer's account information. Below is a list of updates we are able to make: *(Note: We are UNABLE to make changes to customers personal information such as Name, DOB, last 4 of SSN or Service Address.)*

- Billing Address
- Account Password / Challenge Pin

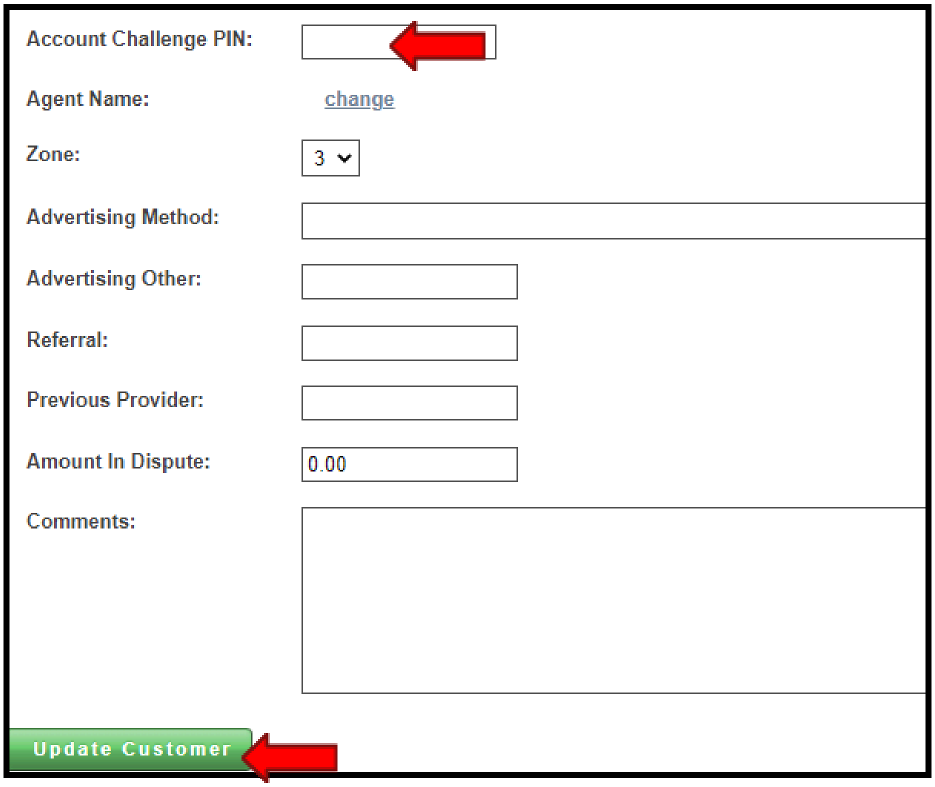
Assist Wireless / enTouch Customers

1. Pull up the account in Fusion and click [Edit Account]

2. Locate the field that needs to be updated
    a. Account password changes are made on the General tab
    b. Click the [Address] tab for Billing address changes.



3. Update the information and click Update Customer



4. Note account of changes.

Plan Change

Effective 5/1/2024, all paid plans (Assist & enTouch Wireless) will *include international long-distance* (ILD) calls or texts. Existing customers that would like to have ILD as a feature on their service can upgrade to a paid plan at any time by contacting customer service.

If the plan change is requested after the customer's monthly bill is created, the new plan will not take effect until the next bill due date, if the bill is paid.

If customers on paid plans fail to pay their monthly bill, they will only receive the free base plan. Once the past due invoice is paid, they will receive the remaining plan features.

How our Paid Plans Work:

All customers, regardless of the plan they are on, will receive their monthly allotted free base plan on their reload date. If the customer is on a paid plan, they will receive the additional benefits on the bill due date, if the bill is paid or once the past due bill is paid. *Please note that customers can have different monthly reload & Bill due dates.

ViaOne SERVICES

Plan Description	Tribal Designation	What Loads Automatically Each Month	What Loads on Bill Due Date (If bill is paid) / When Past Due Bill Is Paid	Price
LL Unlimited Talk/Text/5GB	Tribal	2,500 Talk & Unlimited Text + 4GB	1GB & ILD	$1.00
LL Unlimited Talk/Text/6GB	Tribal	2,500 Talk & Unlimited Text + 4GB	2GB & ILD	$5.00
LL 1000 Talk & Unlimited Text + 100mb	Non-Tribal	1000 Talk/500 Text/100mb	Unlimited Text & ILD (Not eligible for ILD)	$1.00
LL 1200 Talk & Unlimited Text + 250mb	Non-Tribal	1000 Talk/500 Text/100mb	200 Talk/Unlimited Text/150mb & ILD (Not eligible for ILD)	$5.00
LL 1200 Talk & Unlimited Text + 1GB	Non-Tribal	1000 Talk/500 Text/100mb	200 Talk/Unlimited Text/900mb & ILD (Not eligible for ILD)	$10.00
LL 500 Talk/500 Text/4.5GB	Non-Tribal	300 Talk/300 Text/4.5GB	200 Talk/200 Text	$1.00
LL 1000 Talk/1000 Text/4.5GB	Non-Tribal	300 Talk/300 Text/4.5GB	700 Talk/700 Text	$5.00
LL 1500 Talk/1500 Text/4.5GB	Non-Tribal	300 Talk/300 Text/4.5GB	1200 Talk/1200 Text & ILD	$10.00
LL Unlimited Talk & Unlimited Text + 4.5GB	Non-Tribal	300 Talk/300 Text/4.5GB	Unlimited Talk/Text & ILD	$25.00
LL Unlimited Talk & Unlimited Text + 5GB	Non-Tribal	300 Talk/300 Text/4.5GB	Unlimited Talk/Text/500mb & ILD	$26.00
LL Unlimited Talk & Unlimited Text + 6GB	Non-Tribal	300 Talk/300 Text/4.5GB	Unlimited Talk/Text/1 GB & ILD	$30.00

Billing Explanation:

ID	Status	Created	Due Date	Taxes	Total	Balance	Employee	Type
4789577[illegible]	Paid	04/17/2024	05/01/2024	0.08	1.08	0.00	System: Billing	Monthly Bill 122

The bill's "**Created**" date is when the monthly bill was created, however it is not "Due" yet.

- If the customer requests a plan change *AFTER* their monthly bill has been created, their plan change will not go into effect until the next bill is created.

    - Example: If the customer requests a plan change on 04/20/2024, but their bill was created on 04/17/2024, their new plan will be reflected on their bill that will be created on 05/17/2024 and will be effective on following due date of 06/01/2024 if it is paid.

The bill's "**Due Date**" is the last day that payment can be made for that bill before it's considered unpaid or overdue.

- If the customer has NOT paid their bill by the due date, they will not receive the additional benefits of their paid plan until the bill is paid.
    - Example 1: If the customer's bill is due on 05/01/2024 and it is paid, on 05/01 they will receive the additional benefits of their paid plan.
    - Example 2: If the customer's bill is due on 05/01/2024 but it is not paid, they will not receive the additional benefits of their paid plan until it is paid. If the customer pays their bill on 05/07, that will be the date the remaining benefits of their plan will load.

Important Notes:

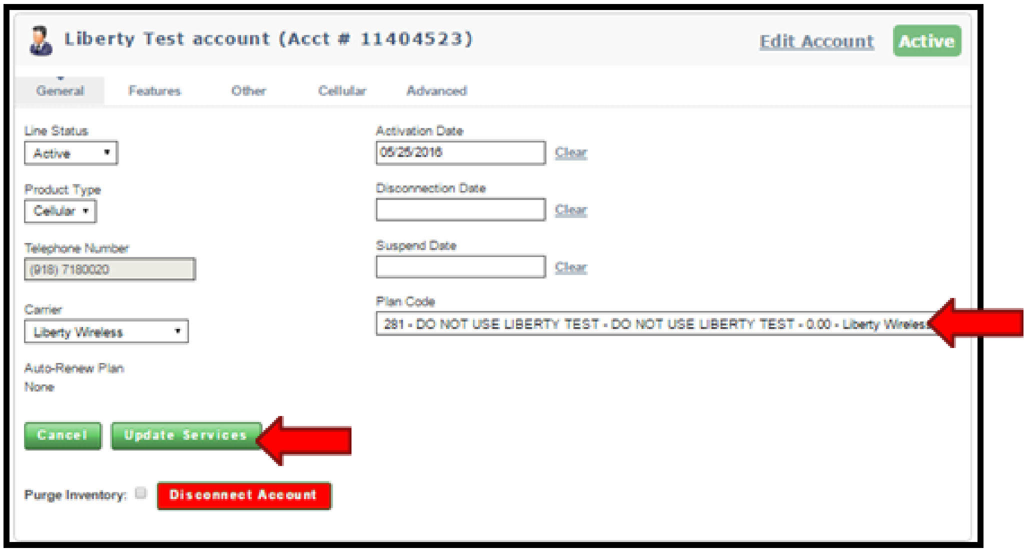
- All plan changes must be done as "**Billing Only**".
- Customer's bill must be paid to receive the additional plan benefits
- Once a Plan change is complete, the new plan will begin on the customer's next bill due date
- ILD will not work unless the monthly bill is paid
    - If the customer pays their late bill, the International Long Distance feature will be reinstated after an hour
- CA Customers (ONLY) can choose to buy the ILD feature as a stand alone top up and will have the feature for 30 days
- Upon accumulation of four (4) unpaid invoices by a customer, the oldest invoice will be automatically marked as "Paid" by the system. However, the "pending renewal," which is responsible for loading additional plan benefits, will not be processed.

To change a customer's plan:

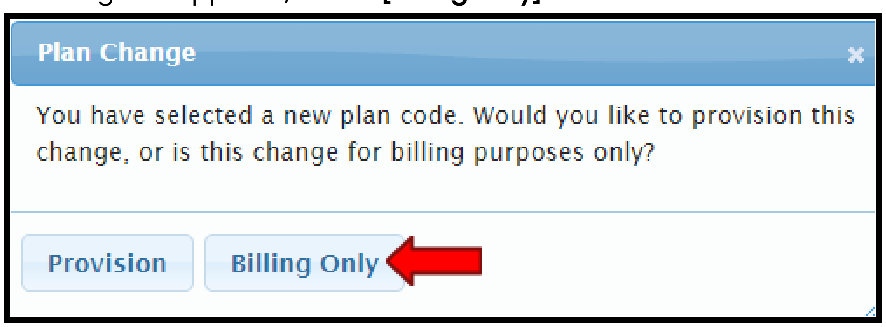
1. Search for the customer's account. Once on the overview screen click on the customer's phone number.

2. Click on View Detail.

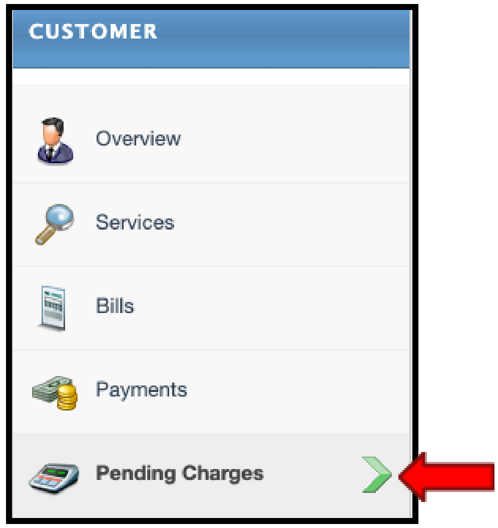
3. Locate the customer's desired plan from the dropdown menu and click "Update Services."



4. When the following box appears, select **[Billing Only]**

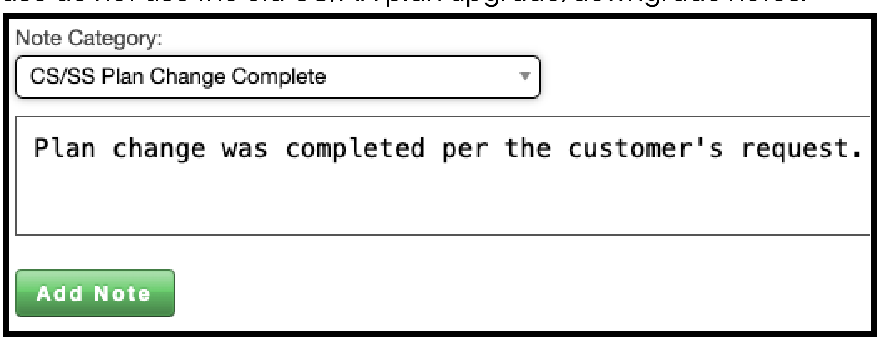


5. Once the plan is changed, select [Pending Charges] under the customer's tab.



6. Void any pending charges by selecting [Void] to ensure the customer's next monthly bill generates the correct amount.

7. Add canned note "CS/SS Plan Change Complete"
    a. Please do not use the old CS/AR plan upgrade/downgrade notes.



Frequently Asked Questions

Q:When will the customer's plan load?

A: The customer's plan will load in two separate transactions. The free base portion of the plan will load every 30 days on or close to the customers anniversary date of enrollment. The second portion will load on the bill due date IF the bill is paid.

Q: What if the customer does not pay their bills?

A: If customers on paid plans fail to pay their monthly bill, they will only receive the free base plan. Once the past due invoice is paid, they will receive the remaining plan features including ILD.

Q: Can the customer make International Long Distance calls if they are on a free plan?
A: The ILD feature is only available to customers who are on a paid plan and are in good standing.

Q: If a customer wants to change their plan today, when will it be effective?
A: If the plan change is requested after the customer's monthly bill is created, the new plan will not take effect until the next bill due date, once the bill is paid.
Example: Customer's current bill is due on 04/21 and they request a plan change. The new plan will be effective on 05/21 as long as the bill is paid.

Q: When can a customer request a plan change?
A: Customers can request a plan change at any time as long as their account is active.

Change Of Address

Customers needing to update their service address must go online to Lifeline National Verifier to submit a change of address. Notice and the appropriate address proof documentation must also be sent to info@viaoneservices.com

- Note: Agent Relations is ONLY able to change a customer's billing address./

Phone Number / MDN Change

When customers call in to change their current phone number to a new number we refer to this as an MDN (**Mobile Device Number**) swap.

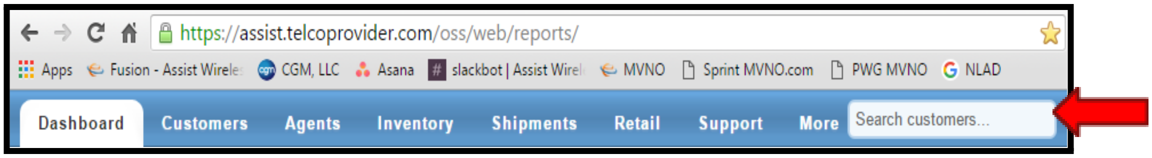
Changing a customer's phone number can be done by Sales Support/Agent Relations and Customer Service. Changing a customer's phone number by using the Swap MDN feature will not change the area code assigned to the customer. In order to change the area code, a swap with a pre-activated phone must be done.

Important Note: Beginning Wednesday, June 19th, 2024, We will begin charging a fee for phone number changes [SKU 2255]. Customers will be allowed one courtesy MDN change every 6 months; Anything outside of that will be subject to a $5 fee that must be paid before the MDN change is processed.

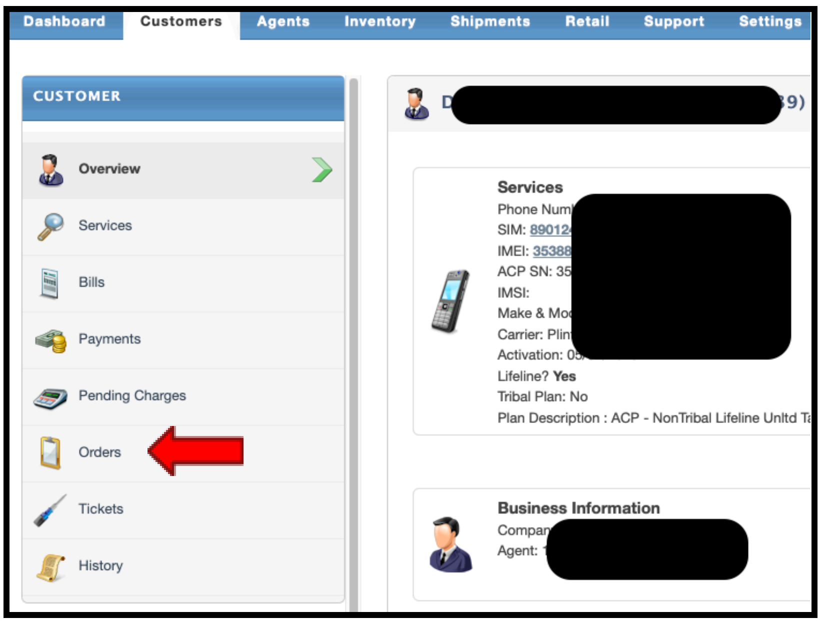
Assist Wireless / enTouch

To perform an MDN Swap:

1. Log in to Fusion and search for the customer's profile by entering the phone number or account number into the "Search Customers" field and press enter.



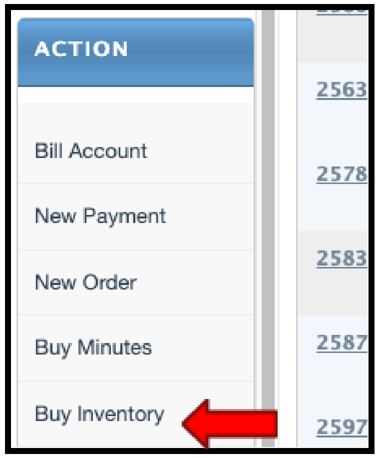
2. Select [Orders] under the customer action menu



3. Verify that there has been <u>**NO**</u> [Completed Swap MDN] orders within the past 6 months

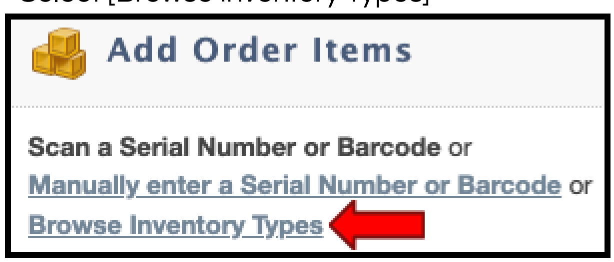
ID	Created	Status	Type	PON	User	Carrier
[redacted]	08/23/2023 8:49:05 PM	Completed	Unlock	0823F3Y56KGR6Q	Employee: Smile 16	Plintron ITG
[redacted]	05/09/2023 2:50:23 PM	Completed	Swap MDN	0509T5YWK8DFXC	Employee: Smile 20	Plintron ITG

a. If the customer has had a Completed MDN swap within the last 6 months, the customer will need to pay a $5 fee prior to the MDN change being processed.
   1. Select [Buy Inventory] under the Action menu



2. Select the Warehouse as either [Assist Wireless] or [Boomerang Wireless] depending on the customer

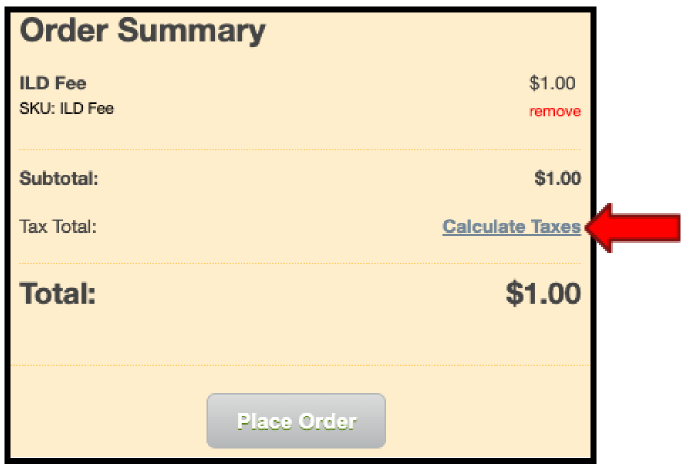
3. Select [Browse Inventory Types]

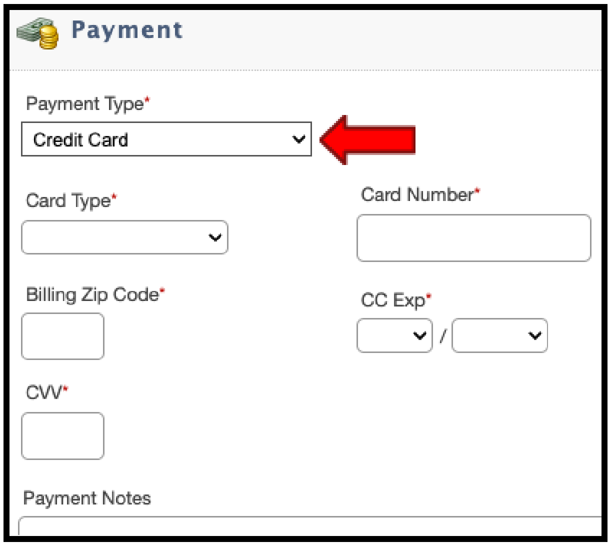


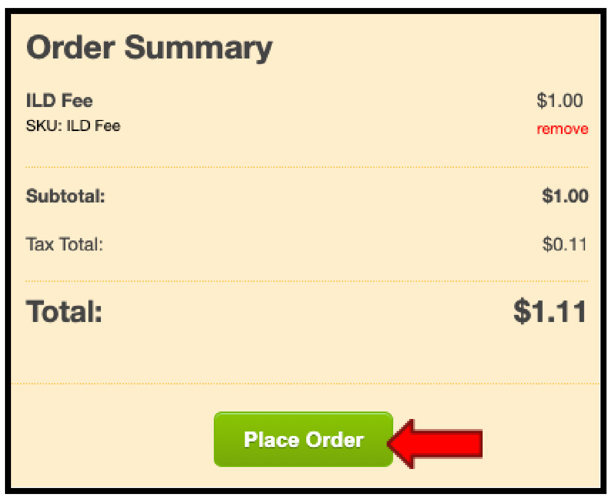
4. Select [MDN Swap Fee] from the drop down menu

5. Click [Add to Order]

6. In the Order Summary, click [Calculate Taxes], enter the payment information, then click place order.





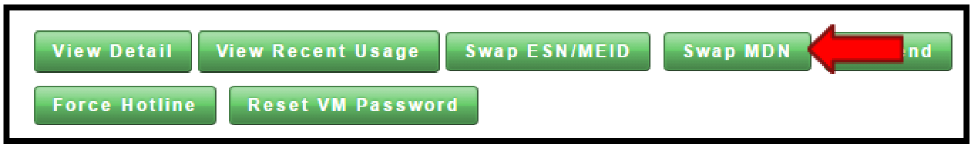


7. Once the payment is successful, continue to step 4.

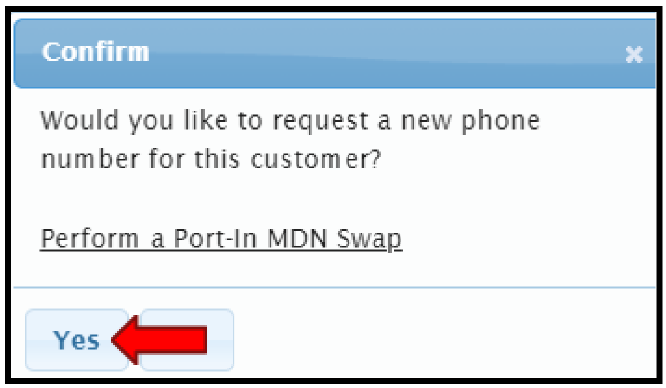
b. If the customer has <u>*NOT*</u> had a phone number change within the past 6 months, continue to step 4.

4. On the account's overview screen click on Swap MDN.

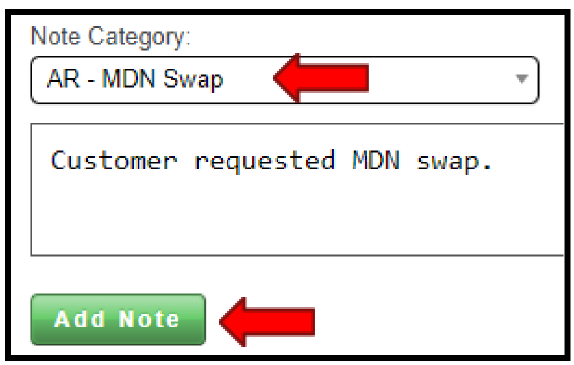
a. If this feature is not working, click on the phone number and click on the "Swap MDN" button



5. When the confirmation box pops up, click "Yes" to confirm the MDN change or "No" to go back to the previous screen.



6. Add AR - MDN Swap canned note to the account



i. Please Note – we **CANNOT** return to the old phone number once it has been changed. The Fusion Retail system will automatically select a new phone number for the customer, we do not get to choose.

ii. The phone number is based on the zip code on the service address on the customer's account. If they are wanting a different area code, they will have to update their address by completing a new Lifeline form and submitting it to the Compliance Department.

Merging Prepaid to Lifeline - Assist Wireless

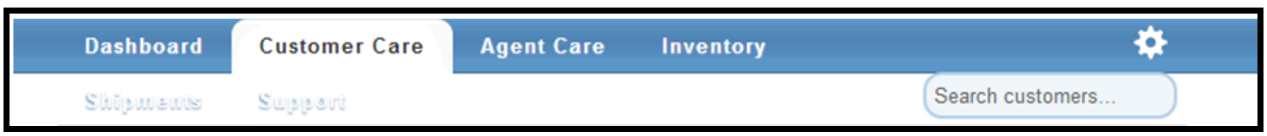
If an Assist Wireless customer wants to port in a phone number from another provider, a prepaid account needs to be created first. This is done by store employees at Assist Wireless retail locations.

How To Create A Prepaid Account

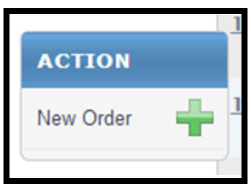
Assist Prepaid accounts are created directly in the Fusion system. When entering an order, a dummy "activation plan" with 5 voice minutes is used to complete the account setup. These function very similarly to a Pay-As-You-Go phone and there is no recurring monthly plan or bill. The customer can simply load top-ups on the phone as they wish. *Customers who do not purchase top-ups within 90 days will be disconnected.*

To create an Assist Prepaid account, follow the steps below.

1. Click on the *Customer Care* tab.

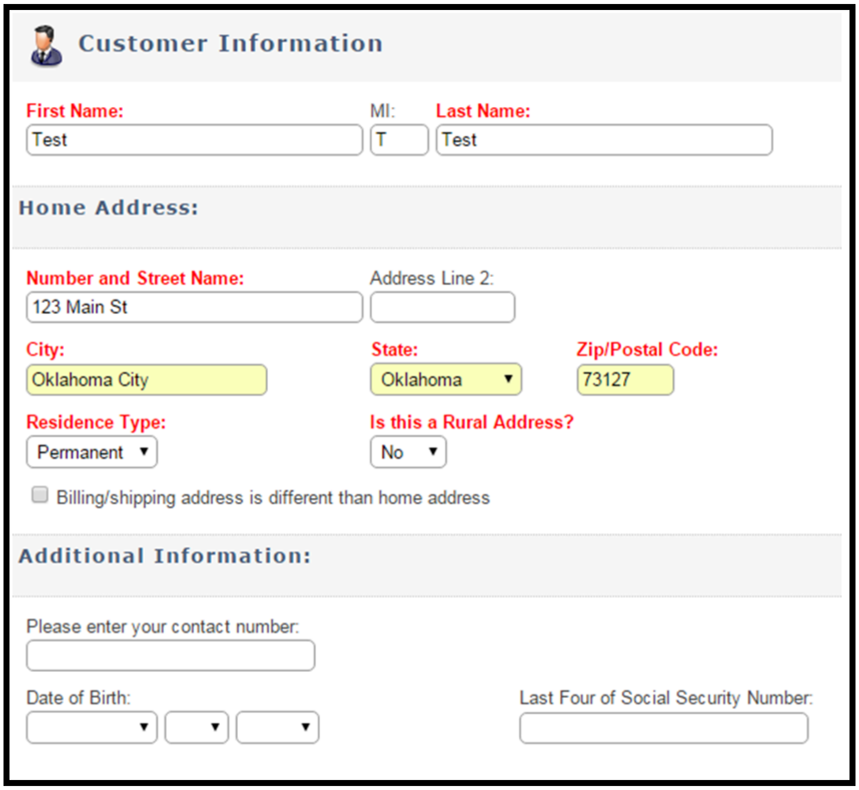


2. In the Action menu, click on *New Order.*

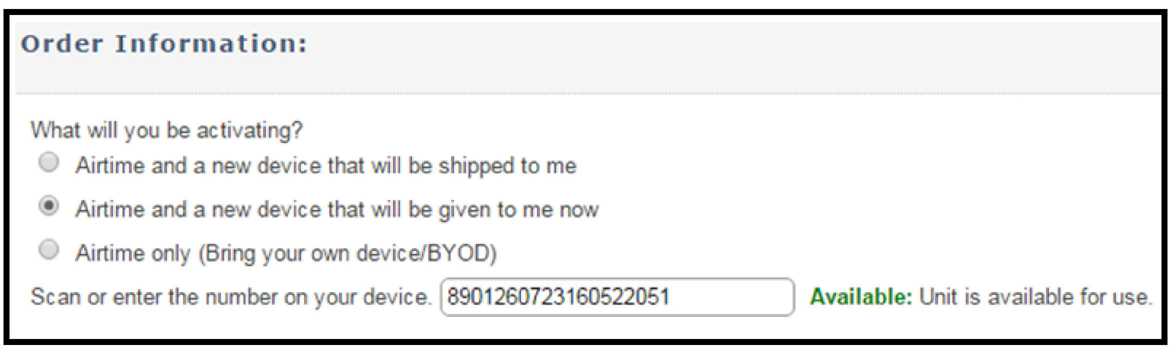


3. Select *Assist Prepaid* as the Company for this order.

4. Enter the requested information.



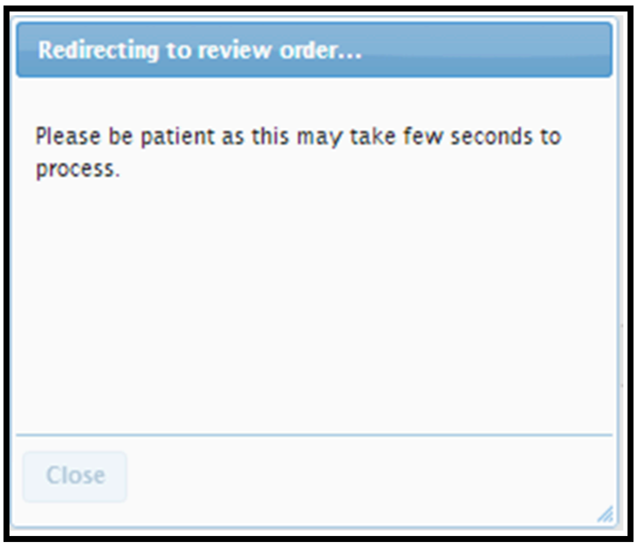
5. You will ALWAYS select *Airtime and a new device that will be given to me now*



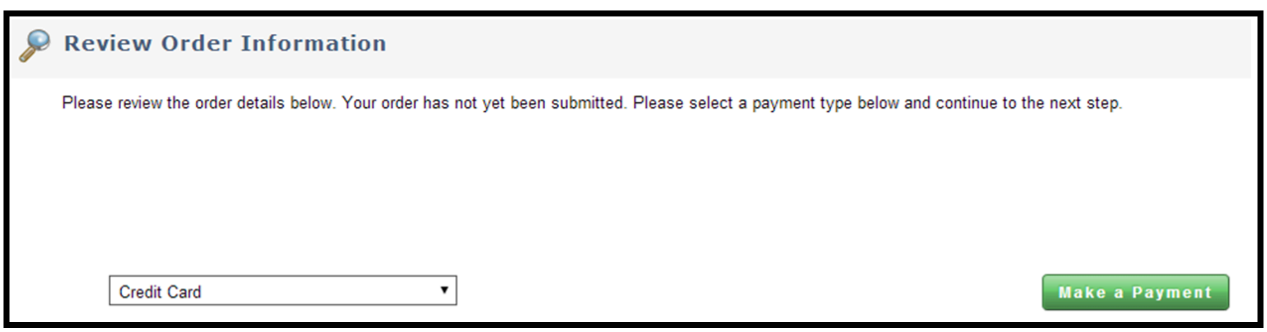
6. Scan or enter the number on the device
    a. The system will let you know if the ESN/SIM number is available immediately and before allowing you to continue with the order.

7. Select the plan to activate the device on (Assist Prepaid Plan for phones and Assist Prepaid Tablet Plan for tablets).

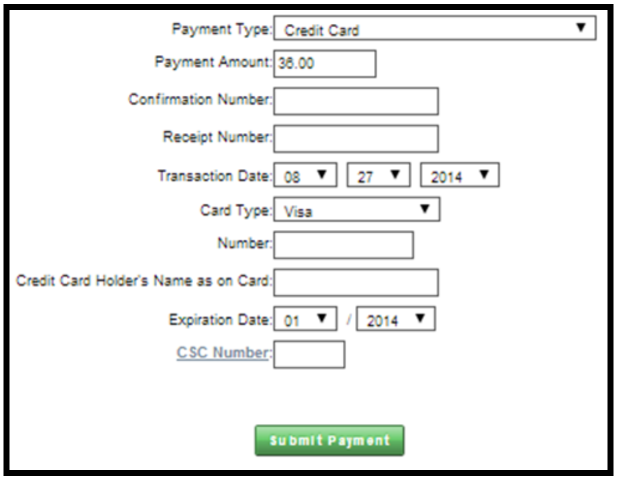
8. Click *Continue.*
9. You will be notified if any address updates need to be changed or if the home address was verified by the USPS.
10. The following screen will appear.



11. Once you are redirected to the following screen, select the *Payment Type* and click on *Make a Payment*.



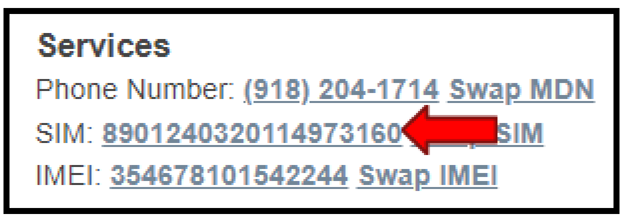
12. Enter in the payment information and click *Submit Payment*.



13. Once your payment has been processed, the customer's new account and phone numbers will be displayed and you are ready to provide them with this information.

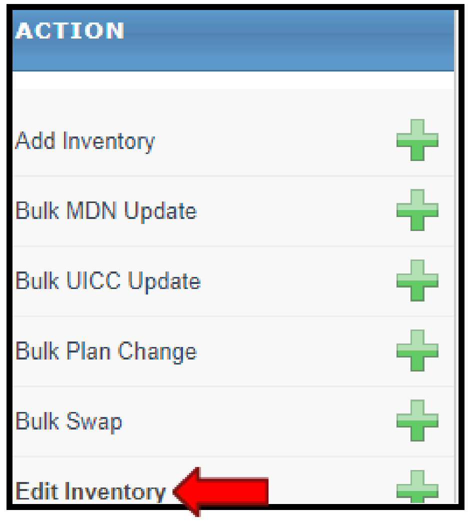
If a customer would like to keep their existing phone number which is on an Assist Prepaid account, follow the steps below.

1. Bring up both Prepaid and Lifeline accounts on two different Fusion retail tabs
2. Copy the SIM card number from the Assist Prepaid account



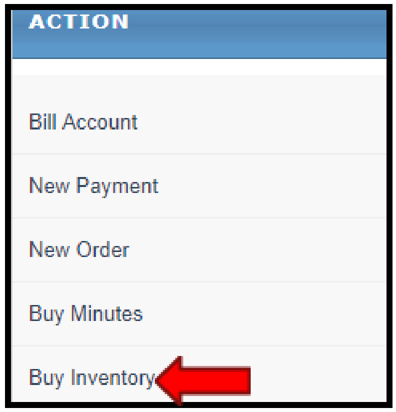
3. Go to Inventory tab and search for the SIM
4. After it's brought up in inventory; scroll to the bottom and click [Purge Unit]

5. Select edit inventory on the left hand side under Action



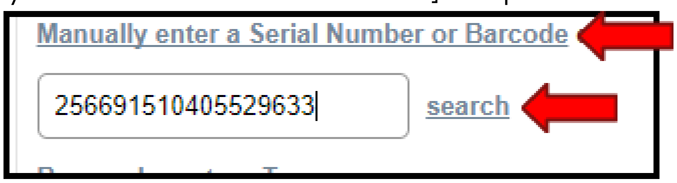
6. Paste SIM in search box then select [add] and then select the green edit inventory button

7. Change Status to [Available] and then select [update inventory]
8. Go to new Lifeline account
9. Go to buy inventory on the bottom left hand side of the screen



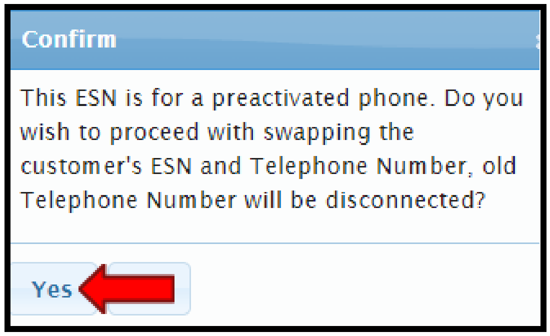
10. Change the warehouse to the name/number the SIM is listed under.

11. Select [Manually enter serial number or barcode] and paste the SIM then search for it.

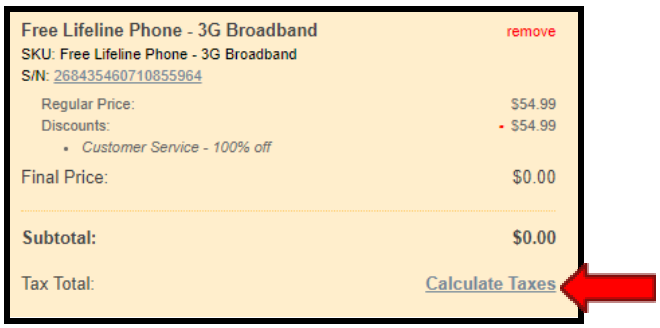


12. If a payment is required, use a General discount to bypass and change the price to zero
13. You will be prompted to select the Swap Reason Code. Select the reason for the swap and click Submit.

14. Next, it'll bring up a pop up box stating that the SIM is pre-activated and the current number will change; you will need to select yes.

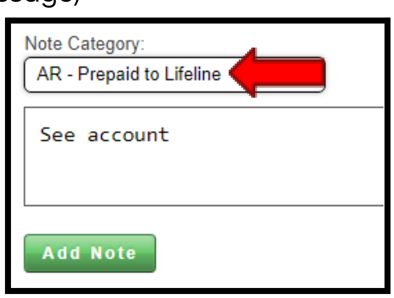


15. In the Order Summary, click on calculate taxes, enter the payment information if applicable and place the order. The system will complete the swap for you.



18. Change Assist Prepaid account status from Active to Final Bill under edit account:

19. Note both Prepaid and Lifeline account: AR - Prepaid to Lifeline (enter corresponding account numbers in the note message)



Phone Number Porting

JotForm Link for port requests:
https://form.jotform.com/ViaOneOperations/EnTouch-Port-In-Requests

Google Sheet Link:
https://docs.google.com/spreadsheets/d/1zCCJnte770jBeJBpsh-GLEf1FKVpF3C0td8pvPKWrpw/edit#gid=613473331

Process for Customer Service

1. Customer Service rep will fill out the JotForm with the necessary information for the port in.
    a. Fusion Account number
    b. Account password
    c. Port in number (Desired Number)
    d. First Name
    e. Last Name
    f. Street Number
    g. Street Name
    h. Street Direction
    i. Address line 2
    j. City
    k. State
    l. Zip

For full Port Process please see EnTouch Port In Request Process

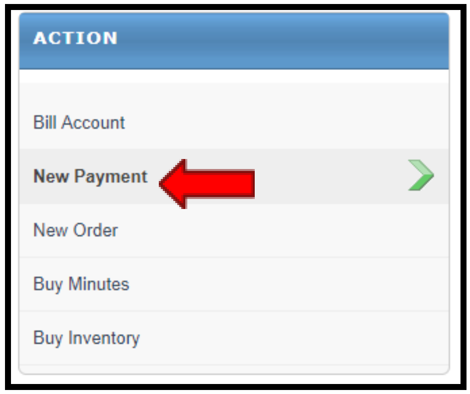
Processing Payments

When a customer wants to make a payment towards their account, we are able to take credit card payments.

To take a payment:

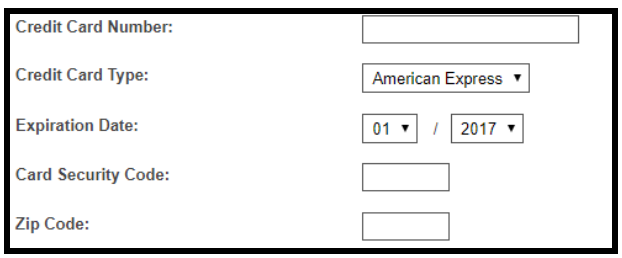
Assist Wireless / enTouch Customers

1. Access the customer's account. Under the Action menu click on [New Payment]

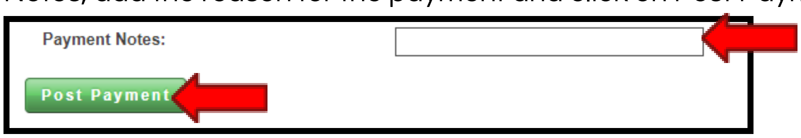


2. Enter the Payment amount the customer wants to make

3. Enter the Credit Card information



4. In Payment Notes, add the reason for the payment and click on Post Payment



Device Payment Procedures - NonTribal Lifeline

Beginning February 12, 2024, all new Non-Tribal Lifeline customers will be required to make a payment of $30 plus tax in order to receive a phone at the time of enrollment. All new Non-Tribal Lifeline/ACP combo customer Tribal enrollments will still receive a free phone at the time of enrollment.

Customer Type	Tribal	Non-Tribal
Lifeline Only Enrollment	FREE	$30 payment

Important Notes

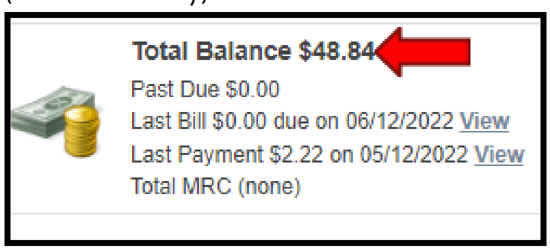
- This is for **NEW** Non-Tribal Lifeline only or Non-Tribal Lifeline/ACP combo enrollments

- Customers must make the payment **AT THE TIME OF SALE** - they cannot make a payment at a later time.
    - If the agent fails to collect the payment, they will be charged back for the device.
- Standard warranty applies.
- If a customer changes their mind about paying for the device, the sales representative will need to call into Agent Relations **the same day** to have the account canceled and the device made back available. Failure to do so will result in a chargeback.
    - Devices that are emailed or chatted in will not be made back available.
    - If agents call in after the day of enrollment, the device will not be made back available.
- Chargebacks will be processed weekly.

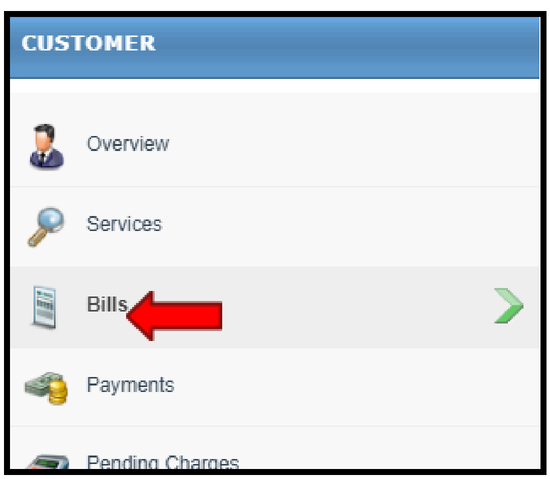
Processing Device Payments:

1. Open the customer's account in Fusion (www.assist.telcoprovider.com)
    a. You can search by account number, phone number or name

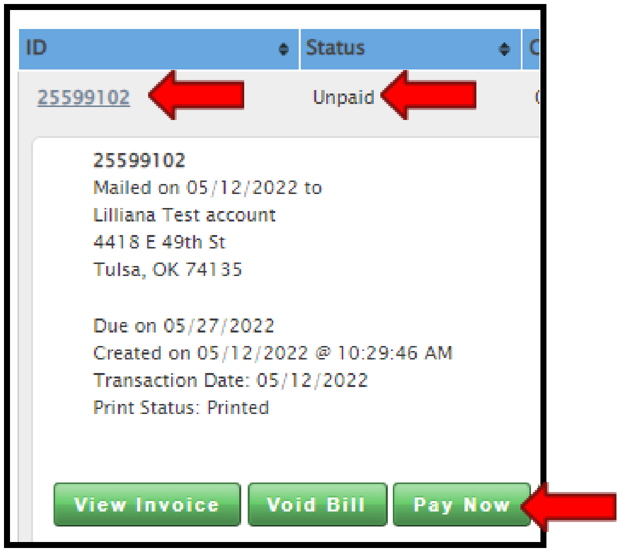
2. Verify the total balance (Prices will vary)



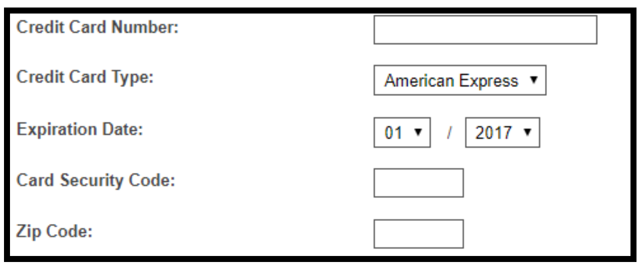
3. Click on [Bills] under the Customer Menu



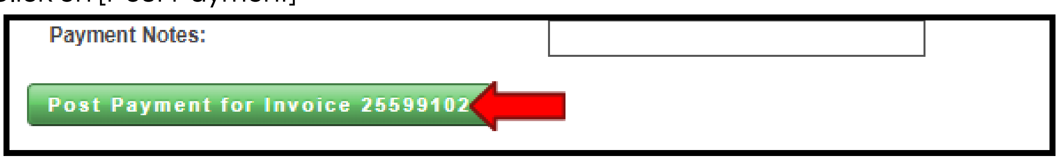
4. Click on the Unpaid bill ID and click [Pay Now]



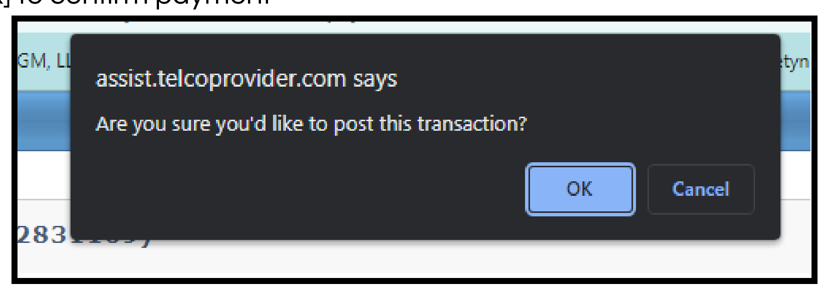
5. Enter the Credit Card information



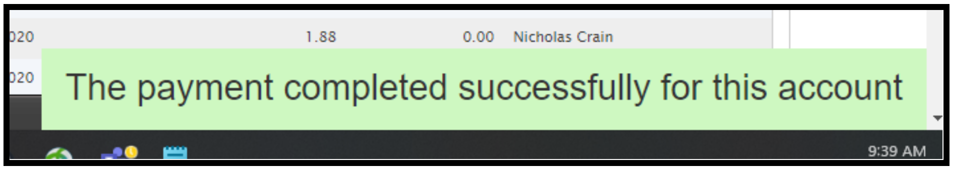
6. Click on [Post Payment]



7. Click [OK] to confirm payment



8. Once payment is successful, you will receive the following message.



Transferring Account Credit

New customers who have a previously closed account with an account credit can choose to transfer the credit to their new account. *Note: this excludes company given credits.*

Before Processing the Credit Transfer:

- Ensure that the Names on the old (Final Bill) and new account match
    -
- Payments must be customer made, company credits cannot be transferred
    - Customer payments will show “Cash or Credit Card” under the payment type

1. Pull up the old account
2. Click on “New Payment” under the Action Menu
3. Make a negative payment for the amount of credit they have available on their account.
    a. Example - if customer has credit of $10, your payment will be [-10]
4. Change the payment type to “Other - Internal use only”
5. Click on Post Payment
6. Click on “Payments” under the “Customer” menu
7. Verify that the payment was posted
8. Once the payment has been posted, open up the account that the credit is being transferred to
9. Click on “New Payment” under the Action Menu
10. Make a positive payment for the amount that was on the customer's Prepaid account
11. Change the payment type to “Other - Internal use only”
12. Click on Post Payment
13. Click on “Payments” under the “Customer” menu
14. Verify that the payment was posted
15. Add Notes to both accounts
    a. Example: Transferred credit of $5 from old account 12345678 to new account 87654321

Voiding Payments

Multiple reasons exist to void a payment in the system. Common reasons include an incorrect SKU entered by the store/field associate, an incorrect amount entered, or the customer changing their mind about a purchase on the same day the transaction occured. Store operators or authorized employees (see list below) must contact Agent Relations to void payments - any request made by agents not on this list should not be processed.

(Credit Card payments cannot be voided the same day. Authorized personnel must call in 24 hours later to have the payment successfully voided) **List of authorized personnel subject to change.*

*****IMPORTANT NOTE: DO NOT mistake Voiding Payments with Refund Requests. Refund requests for things such as customers returning a purchased device and wanting a refund MUST be submitted through the Refund request Jotform for review from the Operations Team.***

Please see the "Refund/Cancellation Requests" section of the handbook for more detail.

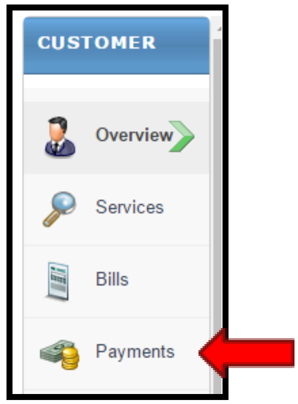
- Lorentz Wireless
  - Rico Hawkins
  - Tony Pierce
  - Amanda Beck
  - Jeremiah Lorentz
  - Ryan Lorentz
  - Jordan Siverson
- Arcus Wireless
  - Jared Snyder
- Diamond Ramos Sales
  - TJ Ramos
- Dehny Roman
  - Tim Lobaugh
  - Bobbie Roman
- Tony Scott
  - Tremaine Scott
  - Carlos Diaz
- Direct Sales Professional
  - Steve Blundell
  - Tanner Selby
  - Tara McCurley
  - Tim Selby
  - Steven Blundell
  - Judith Gonzalez

- *No payment should be voided as a "refund" - all refund requests must be submitted by the agent to the Finance Department.*
- *Credit Card payments are not able to be voided the same day, you WILL receive an error - if the agent requested a CC payment to be voided the same day, it will have to be submitted as a refund request.*

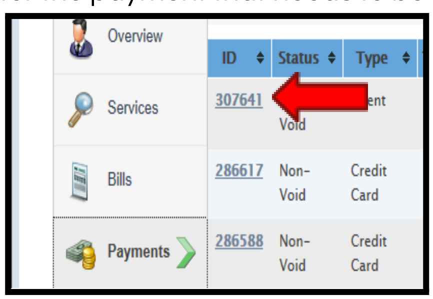
Assist Wireless / enTouch

To void a payment:

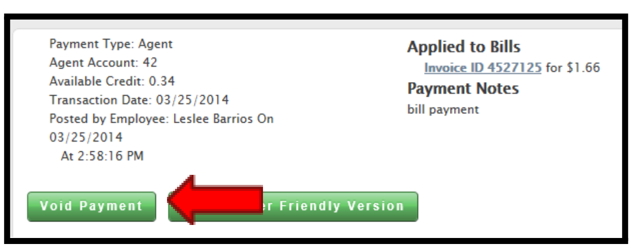
1. Access the customer's account. Under the customer menu click on Payments.



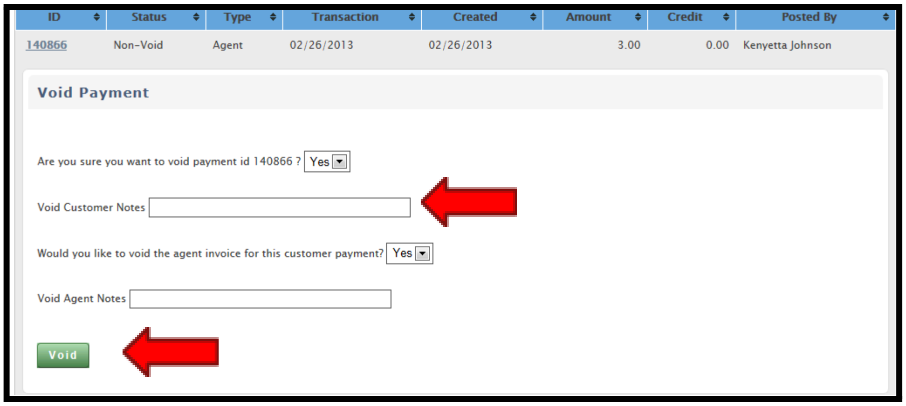
2. Click on payment ID for the payment that needs to be voided.



3. The payment screen information will expand and then proceed to click on Void Payment.



4. Fill out the Void Agent Notes section with the reason for the cancellation and then click Void.

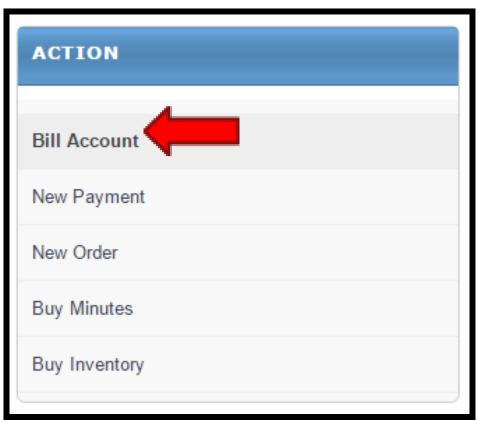


Manual Bills - Using Account Credits for Top Ups

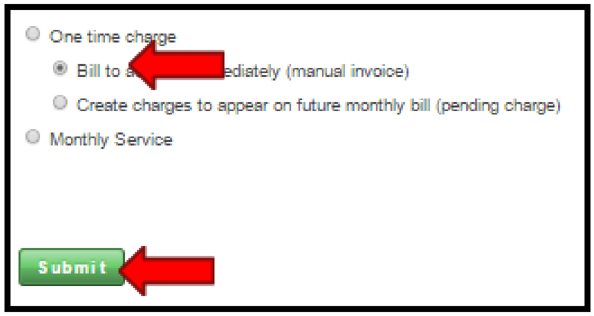
Manual bills will be added for reasons such as the customer wants to use their credit to purchase a top-up, to correct billing mistakes made by agents or the stores or if there is a system billing issue.

To manually bill an account:

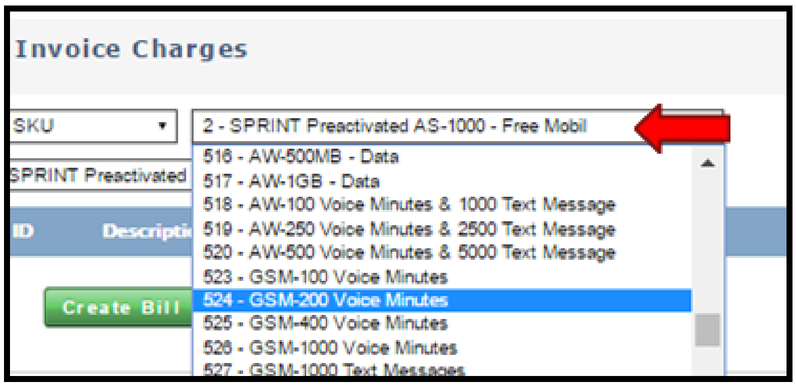
1. Pull up the account in Fusion
2. Click [Bill Account]



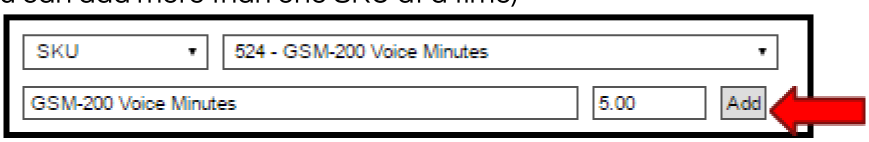
3. Select [Bill to account immediately (manual invoice)] and click Submit



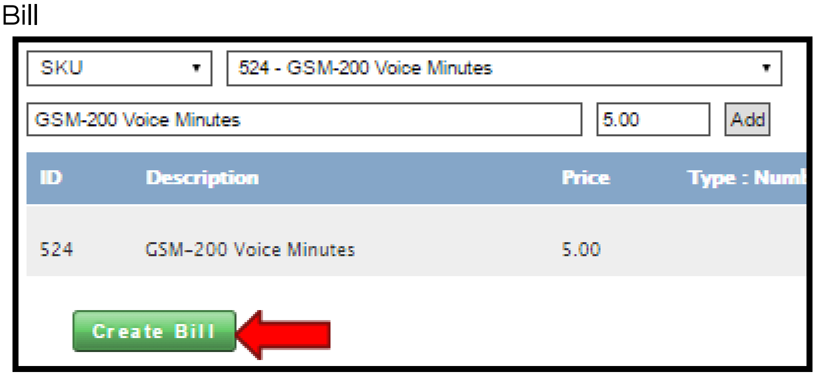
4. Select the SKU that should be added to the bill (See Top Up SKUs & Pricing)



5. Click Add (you can add more than one SKU at a time)



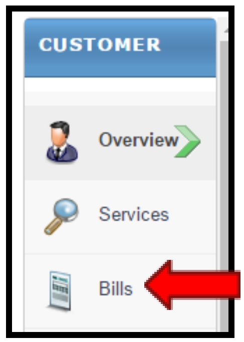
6. Click Create Bill



Billing Errors
Occasionally, Monthly bills will generate incorrectly in the system. Agent Relations Associates will need to first determine the reason for the error, and then take steps to correct it.

Assist Wireless / enTouch
To void a bill:

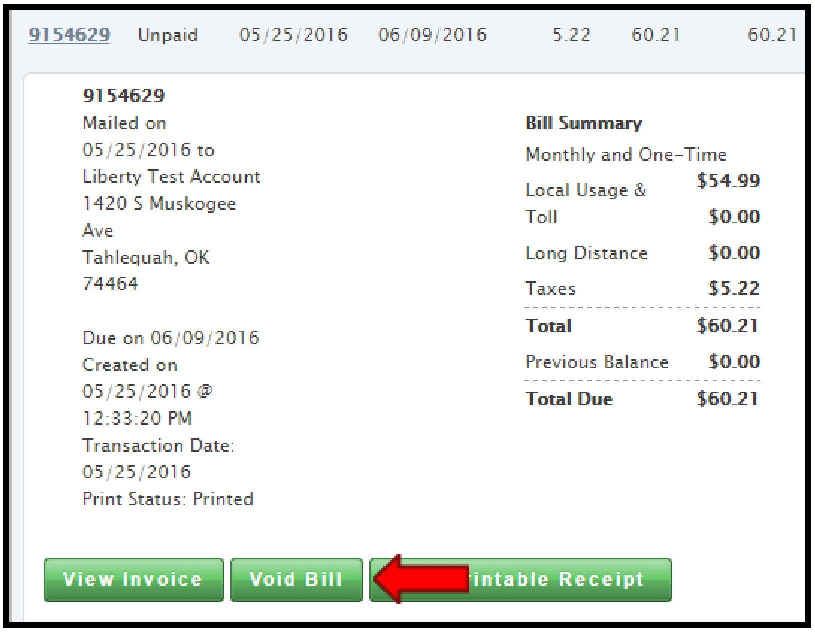
1. Access the customer's account and click on Bills



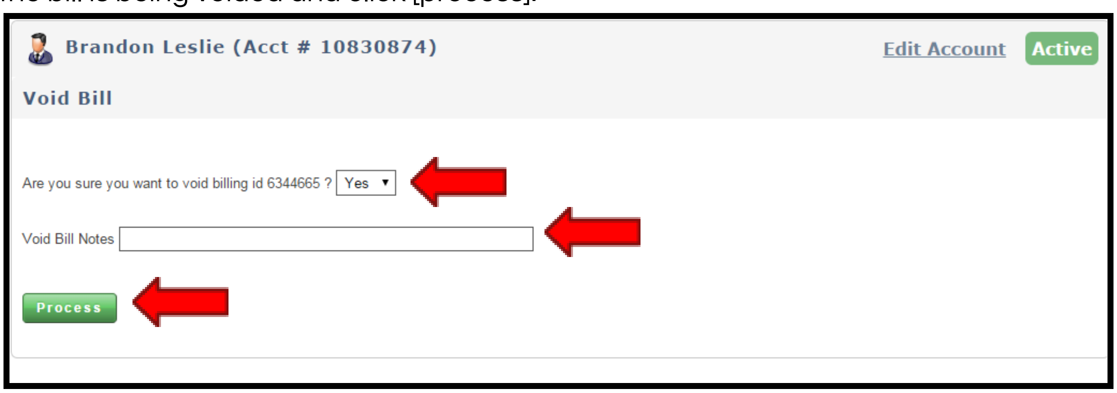
2. The Bill screen will display and select the corresponding Bill ID to be void.

ID	Status	Created	Due Date	Taxes	Total	Balance
9154630		05/25/2016	05/25/2016	0.00	0.00	0.00
9154629	Unpaid	05/25/2016	06/09/2016	5.22	60.21	60.21

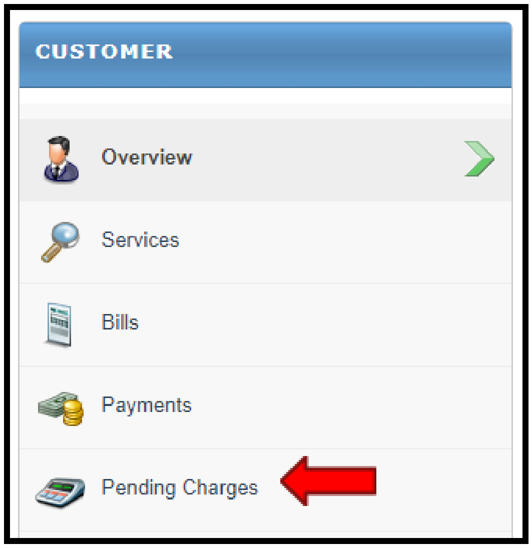
3. The Bill screen will expand and click on Void Bill.



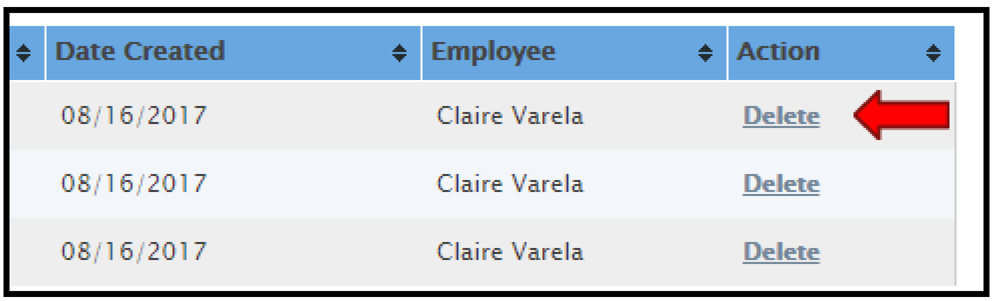
4. Proceed to confirm if the bill needs to be voided by selecting yes. Add notes to why the bill is being voided and click [process].

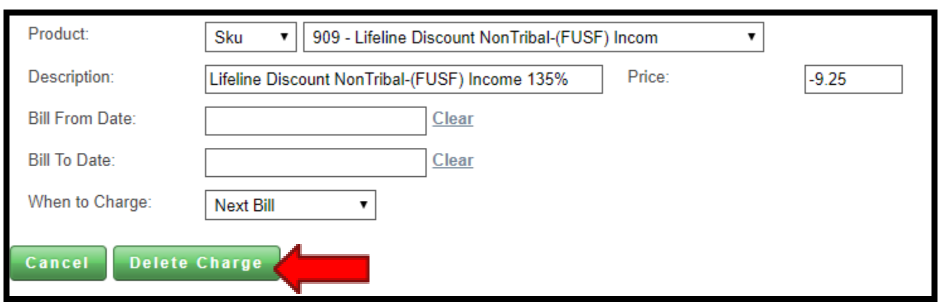


5. Before rebilling the account for the correct amount, go back to the overview page and click on Pending Charges.



6. If there are charges listed under [Current Pending Charges], click [Delete], then click [Delete Charge].





Viewing Talk/Text/Data Balances & Reload Dates

Each month the Customer will automatically receive their allotted talk, text and data based on their plan. These buckets reload automatically every 30 days.

Customers receive free voicemail, caller ID, call waiting, call forwarding, 3-way calling and domestic long distance based on the availability provided by the underlying carrier.

*Unlimited usage rules apply. Unlimited use does not mean impermissible or unreasonable use ([as set forth in these terms and conditions](#))

The process below shows how to view customer's talk, text and data balances as well as the next reload date

How to View Talk/Text/Data Balances

1. Pull up the account in Fusion and click the customer's phone number

Purchasing Top-Ups

Top-Ups are additional Talk, Text and Data packages that are available for purchase when customers run out of minutes, text, and data services in their corresponding calling plans. You will receive calls and chats with requests from agents or stores to add them on behalf of the customers, however, you should advise the agent that they need to dial 611 to have this processed through the IVR or by Customer Service. *When you receive this request via chat and the agent states that they cannot reach Customer Service, you must ask for a contact number and have an available agent contact the agent within two minutes of receiving the callback number.* Once you have them on the phone, you need to have the agent call 611 or the Customer Service number and put it on speaker for you to hear. If you hear an error message escalate it to Tier2 via slack immediately and proceed to add the courtesy minutes or texts.

Below is a list of top-ups:

Assist Wireless / enTouch

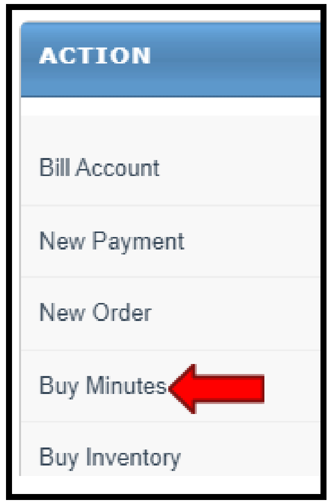
Top Up SKUs & Prices

Top Up	Price	Carrier	SKU	Carrier	SKU	Carrier	SKU	Carrier	SKU
100 Voice Mins	$4.00	MVNOConnect	2212	MVNOC - Panda	2237	Plintron ITG	2150	PWG	523
400 Voice Mins	$8.00	MVNOConnect	2197	MVNOC - Panda	2222	Plintron ITG	2151	PWG	525
1000 Voice Mins	$15.00	MVNOConnect	2198	MVNOC - Panda	2223	Plintron ITG	2152	PWG	526
1000 Texts	$5.00	MVNOConnect	--	MVNOC - Panda	--	Plintron ITG	2153	PWG	527
2000 Texts	$8.00	MVNOConnect	--	MVNOC - Panda	--	Plintron ITG	2154	PWG	528
4000 Texts	$12.00	MVNOConnect	--	MVNOC - Panda	--	Plintron ITG	2155	PWG	529
100MB Data	$4.00	MVNOConnect	2202	MVNOC - Panda	2227	Plintron ITG	2156	PWG	530
500MB Data	$8.00	MVNOConnect	2249	MVNOC - Panda	2257	Plintron ITG	2247	PWG	2245
1GB Data	$12.00	MVNOConnect	2250	MVNOC - Panda	2258	Plintron ITG	2248	PWG	2246
100 Voice/1000 Text	$7.00	MVNOConnect	2205	MVNOC - Panda	2230	Plintron ITG	2159	PWG	533
250 Voice/2500 Text	$13.00	MVNOConnect	2206	MVNOC - Panda	2231	Plintron ITG	2160	PWG	534
500 Voice/5000 Text	$19.00	MVNOConnect	2207	MVNOC - Panda	2232	Plintron ITG	2161	PWG	535
1 Day Unlim T&T (1000 voice/2000 sms)	$5.00	MVNOConnect	--	MVNOC - Panda	--	Plintron ITG	2162	PWG	1180
3 Day Unlim T&T (1000 voice/2000 sms)	$8.00	MVNOConnect	--	MVNOC - Panda	--	Plintron ITG	2163	PWG	1181
Unlim T&T (1000 voice/2000 sms)	$5.00	MVNOConnect	2208	MVNOC - Panda	2233	Plintron ITG	--	PWG	--
1 wk Unlim T&T (1500 voice/3000 sms)	$13.00	MVNOConnect	2210	MVNOC - Panda	2235	Plintron ITG	2164	PWG	1182
2 wk Unlim T&T (2500 voice/4000 sms)	$20.00	MVNOConnect	2211	MVNOC - Panda	2236	Plintron ITG	2165	PWG	1183
100/1000/1GB (90 Day)	$25.00	MVNOConnect	2209	MVNOC - Panda	2234	Plintron ITG	2166	PWG	1184

How to purchase a top-up

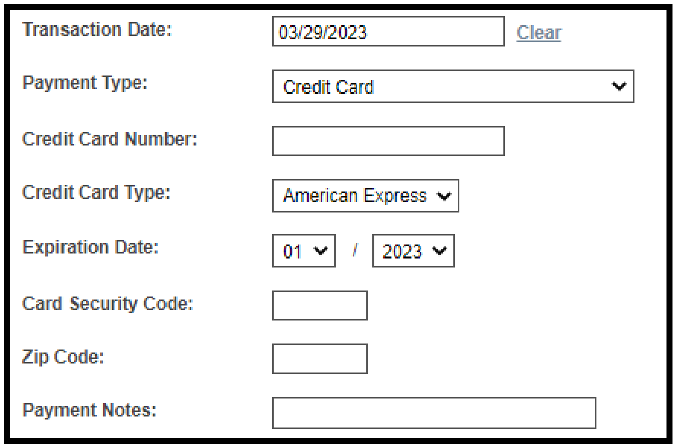
1. Pull up the account in Fusion

2. Select [Buy Minutes] from the Action Menu



3. Select the customers desired top-up and enter payment information.
    a. Multiple products can be selected at once

	Select	Quantity	Unit Price	Total Price	Description
Select Product:	☐		4.00	0.00	GSM-100 Voice Minutes T
	☐	0	8.00	0.00	GSM-400 Voice Minutes T
	☐	0	15.00	0.00	GSM-1000 Voice Minutes T
	☐		5.00	0.00	GSM-1000 Text Messages T
	☐		8.00	0.00	GSM-2000 Text Messages T
	☐		12.00	0.00	GSM-4000 Text Messages T
	☐		4.00	0.00	GSM-100MB - Data T
	☐		12.00	0.00	GSM-500MB - Data T
	☐		15.00	0.00	GSM-1GB - Data T
	☐		7.00	0.00	GSM-100 Voice Minutes & 1000 Text T



4. Click on Post Payment

*If a customer wants to use their account credit towards top-ups, manually bill the account for the top-up they desire.

Adding Courtesy Minutes

When customers are on an **unlimited plan** they have the option to receive courtesy whenever they run out of their monthly minutes or text. You will receive calls and chats with requests from agents or stores to add them on behalf of the customers, however, you should advise the agent that they need to dial 611 to have this processed through the IVR or by Customer Service. *When you receive this request via chat and the agent states that the IVR will not work or that they cannot reach Customer Service, you must ask for a contact number and have an available agent contact the agent within two minutes of receiving the callback number.* Once you have them on the phone, you need to have the agent call 611 or the Customer Service number and put it on speaker for you to hear. If you hear an error message escalate it to Tier2 via slack immediately and proceed to add the courtesy minutes or texts.

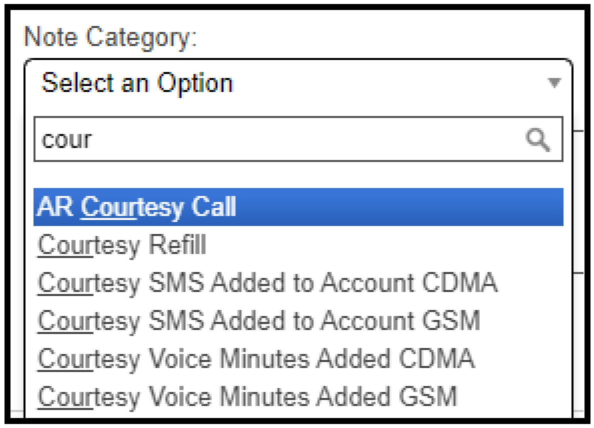
Courtesy Top up SKUs:

COURTESY - Top Up Info				
Top Up	Carrier	Retail SKU	Carrier Code ID	Price
100 Voice Mins	MVNOConnect	2213	4031	$0.00
250 SMS	MVNOConnect	2214	4032	$0.00
500 mb	MVNOConnect	2215	4028	$0.00
100 Voice Mins	Plintron	2147	5670	$0.00
250 SMS	Plintron	2148	5671	$0.00
500 mb	Plintron	2149	5672	$0.00
100 Voice Mins	Prepaid Wireless	791	1871	$0.00
250 SMS	Prepaid Wireless	749	2576	$0.00
500 mb	Prepaid Wireless	2081	2581	$0.00
100 Voice Mins	PWG HHV	2024	2505	$0.00
250 SMS	PWG HHV	2025	2509	$0.00
500 mb	PWG HHV	2085	2536	$0.00

How to Add Courtesy Talk or Text

Below you will find procedures for adding courtesy talk or text messages via Notes on customer accounts. *Note: Courtesy data will be added to the account through Manual Bills*

1. Pull up the account in Fusion
2. Verify that the customer qualifies for courtesy top ups
   a. Must be on Unlimited plan
   b. Talk or Text balance must be below 100
   c. If lifeline only - must not have a past due balance
3. Scroll down to the [Notes] section
4. Search for the Courtesy refill notes



5. Select either GSM Voice or SMS based on the customer's needs
    a. CDMA should not be selected as we no longer have active CDMA customers
6. Click [Add Note]

7. Verify that the courtesy talk/text was added

Refund Requests

Assist Wireless / enTouch

Refund Request Jotform: http://form.jotformpro.com/form/51945714604962

Refunds may be requested by customers for a variety of reasons, including account cancellation with remaining credit, device returns, or overpayments.

All Refund Requests must be submitted via the Refund Requests JotForm . Once the JotForm has been completed, an email will be sent to the Corporate Office for review. If the refund is approved, a note will be added on the customer's account and the request will be forwarded to the Accounting Department if needed. If the refund is denied, a note will be added to the customer's account explaining the details of the denial or if additional information is needed for approval.

Important Notes

- Device Refunds
    - Device must be returned within 7 days of purchase in good condition to be eligible for refund
- We do not issue refunds for additional minutes or data purchased on an account unless the purchase order has failed.
- Company issued credits are not eligible for a refund.
- If the customer is able to verify the address that is on their account, they can request that it is sent elsewhere - the new address should be included in the comment section on the Refund Request Form and the billing address should be updated on the account.
- Customers can choose to receive their refund in several ways including:
    - Account Credit
        - If the customer would like their refund to be applied to their account as an account credit, the payment will be added once the request has been reviewed and approved.
    - Refund Check
        - If the customer is requesting a check to be issued, once the request has been reviewed, it will be submitted to accounting. Accounting will note the account once the check has been issued and will apply a debit to the account to remove the account credit.
    - Credit Card Refund
        - If the customer is requesting the refund be added back to the credit card used to make the payment, the

If the customer is requesting to have their account disconnected, they must contact the Retention department. If the account is disconnected, the store manager should then follow the steps listed below.

To request a refund:

1. Capture image of Customer Screen
2. Complete JotForm for refund request
    a. Enter the Fusion Account Number, Name, email and phone number
    b. Department which the request was received from
    c. Refund Type (Account Credit, Cash, Check or Credit Card)
        i. Cash Refund can only be processed in store
        ii. Note: We cannot issue partial refunds or using different types. The entire refund will be processed as either credit, check or Credit card
    d. Reason for Refund

    e. Amount Requested
    f. Under Comments, please include the following information
        i. Info regarding the reason for the refund
        ii. If the customer wants a refund issued back to the credit card, please include the last 4 of the credit card number in the comments
3. Note account

If the customer is requesting to have their account disconnected, they must contact the Retention department. If the account is disconnected, the store manager should then follow the steps listed above.

- Device Refunds
    - Device must be returned within 7 days of purchase in good condition to be eligible for refund
- We do not issue refunds for additional minutes or data purchased on an account unless the purchase order has failed.
- Company issued credits are not eligible for a refund.
- If the customer is able to verify the address that is on their account, they can request that it is sent elsewhere - the new address should be included in the comment section on the Refund Request Form and the billing address should be updated on the account.
- These requests should only be used on accounts that have been disconnected and have a credit on them after the final bill has been generated.

How to check the status of a refund request

AW Refund Tracker

If the customer is requesting to have their account disconnected, they must contact the Retention department. If the account is disconnected, the store manager should then follow the steps listed above.

- Device Refunds
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- We do not issue refunds for additional minutes or data purchased on an account unless the purchase order has failed.
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- These requests should only be used on accounts that have been disconnected and have a credit on them after the final bill has been generated.

Suspension Requests

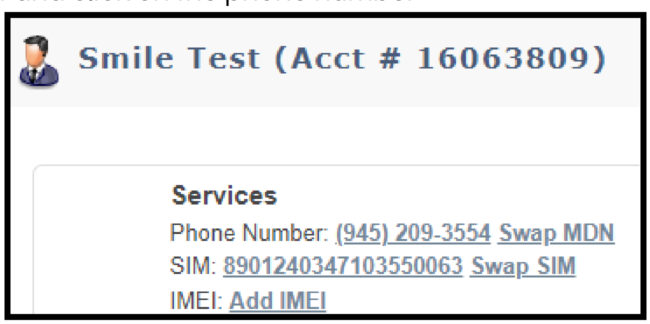
Suspending accounts is only done at the request of the customer. The most common reason for suspension is that the device is lost or stolen - if this is the reason for suspension, advise the customer that they can purchase a replacement device.

Please advise the customer, once an account is suspended, if it is not reactivated within 30 days, the account will be disconnected.

Assist Wireless / enTouch

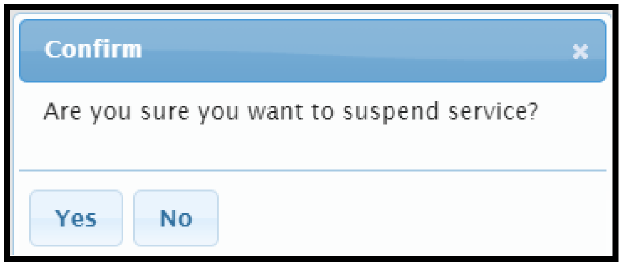
To suspend an account:

1. Access the account and click on the phone number.



2. Select “Suspend”

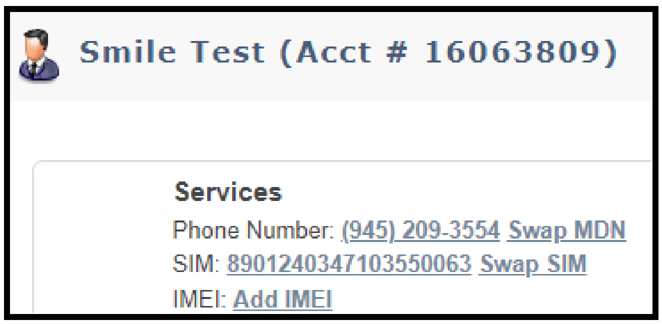
3. Confirm if you want to suspend the service



4. Add “Account Suspended - Customer Request” canned note to account.

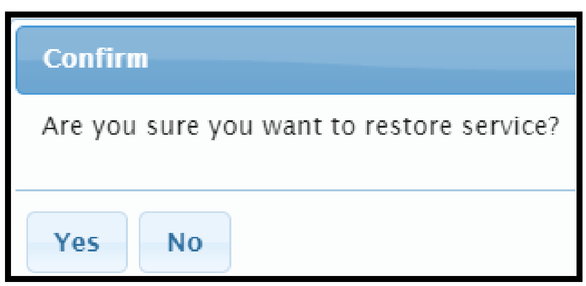
To unsuspend an account:

1. Access the account and click on the phone number.



2. Select [Restore]

3. Confirm if you want to restore the service



4. Add “Unsuspended - Customer Request” canned note to account.

Retention / Account Disconnects

All requests for disconnects should be directed to the **Retention Team**. Any disconnects processed outside of this team will be processed by the Operations Team for reasons such as non-use or benefit transfers.

Retention Department Contact Information

Retention Scripts

The Retention team will attempt to retain the customer by offering discounts to purchase devices or offer free sim cards among other things.

- **Retention discounts MAY be used for Upgraded Devices *(unless a specific promotion says otherwise)***

The below scripts were created to assist you in retaining our customers based on the most popular reasons for disconnect requests. *Customer retention is critical to our success. You must attempt to retain each and every customer.*

You will need to gather additional information for all customers who call in to the Retention Department using the Retention Jotform in order for us to have more insight as to why our customers are choosing to disconnect service.

Assist Wireless

1. Opening Script:

   "Thank you for calling Assist Wireless Retention, may I have the account number you are calling about?"

2. Customer/Agent provides phone/account number
   a. As you are pulling up the account, use the following script to see why the customer is calling in (Avoids an awkward silence).

      " While I pull up the account, can you tell me how I can assist you today?"

   b. If a customer is calling in, have them verify their name and account PIN
      i. If someone else is calling in on behalf of the customer, verify the callers name and search the account notes for an Authorized User note
         1. If note is found, verify the callers name
         2. If note is not found, use the following script to inform the caller that they are not an authorized user:

            "I reviewed the account to see if {insert callers name} was an authorized user and I cannot find a note indicating that the account holder gave permission. We would need to speak to the account holder directly to have [insert callers name] added to the account for future access"

3. After the account is verified, summarize the reason for the call or cancellation below and click the link based on the customer's reason for cancellation to view that section.
    - If the customer is wanting to disconnect due to their device being lost or stolen
    - If the customer is wanting to disconnect to transfer their service to another Lifeline provider
    - If the customer is wanting to disconnect because they are unhappy with the service.
    - If the customer is wanting to disconnect because they are unhappy with their Plan:
    - If the customer is wanting to disconnect due to no longer qualifying for Lifeline service
    - If the customer is wanting to disconnect because they have service with another Lifeline provider

If the customer is wanting to disconnect due to their device being lost or stolen

1. Run customer through the Retention Calculator Tool
2. Offer the customer the discount off a replacement device generated by the retention calculator. The discount may be redeemed in store, field, or via mail.
    - If the customer selects the store/field option, explain in detail what the discount can be used on.
        - Ex: If the customer receives a $30 discount off a replacement, inform them that this discount is eligible on any device in store and they will be responsible for paying the difference after the discount.
    - If the customer selects the mail out option, use one of the following scripts to explain the type of device they can receive based on their discount.
        - $5 - $45 Discounts

          *"We can provide a discount of (**Insert Discount amount here**) off any device in our warehouse. With your discount, you can receive a smartphone for **(Insert amount of device minus discount; Ex. $45 device minus $15 discount = $30)** plus tax."*
        - $45 Discount

          "You qualify to receive a replacement device free of charge. If you'd like to receive the replacement I would just need to verify your shipping address and it should arrive within 3-5 business days"
            - If the customer agrees to the replacement device - continue to step 3

- If the customer declines the above discounts, inform the customer that we can send a free SIM card to be used in an unlocked GSM device and use the following script:

  "We can also send you a free sim card in the mail that can be used in any unlocked GSM compatible device such as a T-Mobile, Metro or AT&T phone. All you would need to do once you receive the sim card, is simply insert it into the device and power the device on."
- If customer declines replacement options, ask if there is anything we can do to interest them in continuing their service with Assist Wireless using the following script:

  "May I ask if there is something specific that you are unhappy with or is there anything we can do to improve your experience with Assist Wireless and interest you in continuing your service with us?"

3. If the customer would like to receive the discount towards the replacement device, accept the discount on the retention calculator so the code can be noted on the customer's account.
   - If the customer would like to have the replacement device mailed, take the payment if applicable and submit the Shipment Request via the jotform.
4. If the customer declines all options, continue with the cancellation using the following script:

   "Please keep in mind that once your services have been disconnected, it can take anywhere from 48 hours up to 30 business days for you to be eligible for Lifeline services again."
5. Closing script:

   "Thank you for calling Assist Wireless. Have a good day."

If the customer is wanting to disconnect to transfer their service to another service provider

1. Inform the customer of our competitive plans and the many rewards we offer using the following script:

   "I'm sorry to hear you are leaving our service, prior to doing so I'd like to inform you we currently offer the best plans in the state of Oklahoma. We also offer more rewards and perks than ANY other Lifeline provider."

   (Use the list below as reference, choose 2 or 3 per call that best fit the scenario.)

- Enjoy the convenience of 23 Assist Wireless store locations (and counting)!
- Refill your talk, text, and data for LESS with Assist Wireless. Get 1GB of Data for only $15!
- Payment Match: Earn FREE account credit just for paying your bill! We will match all bill payments dollar for dollar up to $20.
- Refer-A-Friend Rewards: Earn up to $25 in FREE account credit when your friends sign up with us for Lifeline!
- Birthday Rewards: We like to celebrate YOU with a FREE credit every year on your birthday!
- Anniversary Rewards: Get a FREE gift every year on your Lifeline Service Anniversary
- Recertification Rewards: Earn up to $30 in FREE account credit when you complete your annual recertification.
- Easier way to Manage Your Account: Download our mobile app on the Google Play Store or login online and earn rewards($5 for creating an online account and $5 when you make your first payment through your online account)!

2. Ask the customer what the reason for transferring is. Make sure you include this in the note added to the account.
    - If the customer states they are transferring because they are unhappy with our service
        - Ask if there is anything we can do to improve their experience with Assist Wireless and interest them in continuing their service using the following script:

          "May I ask if there is something specific that you are unhappy with or is there anything we can do to improve your experience with Assist Wireless and interest you in continuing your service with us?"
        - Determine if the customer's request is feasible (ex. The customer wants free minutes, data etc.)
            - Offer a one time courtesy top up depending on the customers needs based on the discount amount they qualify for towards a replacement device (ex. If a customer qualifies for a $10 discount, offer a top up that closely equals in value, 200 minutes for $8 etc.)

- If the customer states they are transferring because they are unhappy with our plans / are being offered a better deal elsewhere
    - Ask what part of their plan they are unhappy with or what better deal is being offered to them using the following script

        "May I ask why you are unhappy with your plan or what deal you are being offered elsewhere?
    - Determine what plan the customer is currently on and if we offer a different plan that would better fit their needs or match what the competitor is offering
        - Offer to change the customer's plan, if possible, to another that might better suit their needs.
- If the customer declines to provide a reason
    - Inform the customer that it would be easier to apply with the provider they are trying to transfer to. If they are approved, their service with us will be automatically disconnected. This would ensure they do not go any period of time without service or have to wait any period of time before re enrolling in Lifeline service using the following script. If they are currently an ACP or Combo customer, this will also ensure that they keep their ACP benefit.

        "I'd like to inform you that it would be easier to transfer your service instead of canceling. Once you apply and are approved with another provider, your service with Assist Wireless will be automatically disconnected. This would allow you to have continued service and you would not have to wait any amount of time before enrolling or go through any period of time without cellphone service."

3. If the customer declines all options, continue with the cancellation using the following script:

    "Please keep in mind that once your services have been disconnected, it can take anywhere from 48 hours up to 30 business days for you to be eligible for Lifeline services again."
4. Closing script:

    "*Thank you for calling Assist Wireless. Have a good day."*

If the customer is wanting to disconnect because they are unhappy with the service.

1. Ask if there is anything we can do to improve their experience with Assist Wireless and interest them in continuing their service using the following script:

   "May I ask if there is something specific that you are unhappy with or is there anything we can do to improve your experience with Assist Wireless and interest you in continuing your service with us?"
2. Determine if the customer's request is feasible (ex. The customer wants free minutes, data etc.)
   - Offer a one time courtesy top up depending on the customers needs based on the discount amount they qualify for towards a replacement device (ex. If a customer qualifies for a $10 discount, offer a top up that closely equals in value, 200 minutes for $8 etc.)
3. If the customer declines all options, continue with the cancellation using the following script:

   "Please keep in mind that once your services have been disconnected, it can take anywhere from 48 hours up to 30 business days for you to be eligible for Lifeline services again."
4. Closing script

   "Thank you for calling Assist Wireless. Have a good day."

If the customer is wanting to disconnect because they are unhappy with their Plan:

1. Ask the customer what part of their plan they are unhappy with using the following script:

   "May I ask why you are unhappy with your plan?"
2. Determine what plan the customer is currently on and if we offer a different plan that would better fit their needs or budget. Offer to upgrade or downgrade their plan accordingly.
   - If the customer states they are unable to afford the plan they are currently on
     i. Offer to downgrade their plan and/or offer an account credit to cover future bills or current past due balances.
     ii. Mention current promotions that allow them to receive account credits towards their monthly bills or to purchase top ups.
        - Payment Match: Earn FREE account credit just for paying your bill! We will match all bill payments dollar for dollar up to $20.
        - Refer-A-Friend Rewards: Earn up to $25 in FREE account credit when your friends sign up with us for Lifeline!

- Birthday Rewards: We like to celebrate YOU with a FREE credit every year on your birthday!
- Anniversary Rewards: Get a FREE gift every year on your Lifeline Service Anniversary
- Recertification Rewards: Earn up to $30 in FREE account credit when you complete your annual recertification.
- Manage Your Account: Download our mobile app on the Google Play Store or login online and earn rewards($5 for creating an online account and $5 when you make your first payment through your online account)!

- If the customer states their current plan does not offer enough talk, text or data,
  i. Mention current promotions that allow them to receive account credits towards their monthly bills or to purchase top ups.
     - Payment Match: Earn FREE account credit just for paying your bill! We will match all bill payments dollar for dollar up to $20.
     - Refer-A-Friend Rewards: Earn up to $25 in FREE account credit when your friends sign up with us for Lifeline!
     - Birthday Rewards: We like to celebrate YOU with a FREE credit every year on your birthday!
     - Anniversary Rewards: Get a FREE gift every year on your Lifeline Service Anniversary
     - Recertification Rewards: Earn up to $30 in FREE account credit when you complete your annual recertification.
     - Manage Your Account: Download our mobile app on the Google Play Store or login online and earn rewards($5 for creating an online account and $5 when you make your first payment through your online account)!

3. If the customer declines all options, continue with the cancellation using the following script:

   "Please keep in mind that once your services have been disconnected, it can take anywhere from 48 hours up to 30 business days for you to be eligible for Lifeline services again."

4. Closing script:

   "Thank you for calling Assist Wireless. Have a good day."

If the customer is wanting to disconnect due to no longer qualifying for Lifeline service

1. Inform the customer that they have qualified for service until their yearly recertification date and can keep their Lifeline service active (as a backup if they already have another service) and the service will be automatically disconnected once the recertification is not completed using the following script:

   "I'd like to inform you that you qualified for service until your yearly recertification date. You can continue to use your service if you'd like and once the yearly recertification is not completed, your service will be automatically disconnected. Would you be interested in keeping this account active and using it as a backup phone?"

2. If the customer declines, continue with the cancellation using the following script:

   "Please keep in mind that once your services have been disconnected, it can take anywhere from 48 hours up to 30 business days for you to be eligible for Lifeline services again."

3. Closing script:

   "Thank you for calling Assist Wireless. Have a good day."

If the customer is wanting to disconnect because they have service with another Lifeline provider

1. Ask if there is anything we can do to interest them in continuing their service with Assist Wireless using the following script:

   "May I ask if there is anything we can do to interest you in continuing your service with us?"

   - If customer states they were unaware that they are only allowed to have one active Lifeline service
     i. Ask the customer if they'd be interested in continuing their service with Assist Wireless versus the other carrier.

2. Inform the customer of our competitive plans and the many rewards we offer using the following script:

   "I'm sorry to hear you are leaving our service, prior to doing so I'd like to inform you that we currently offer the best plans in the state of Oklahoma. We also offer more rewards and perks than ANY other Lifeline provider."

   (Use the list below as reference, choose 2 or 3 per call that best fit the scenario.)

   - Enjoy the convenience of 23 Assist Wireless store locations (and counting)!

- Refill your talk, text, and data for LESS with Assist Wireless. Get 1GB of Data for only $15!
- Payment Match: Earn FREE account credit just for paying your bill! We will match all bill payments dollar for dollar up to $20.
- Refer-A-Friend Rewards: Earn up to $25 in FREE account credit when your friends sign up with us for Lifeline!
- Birthday Rewards: We like to celebrate YOU with a FREE credit every year on your birthday!
- Anniversary Rewards: Get a FREE gift every year on your Lifeline Service Anniversary
- Recertification Rewards: Earn up to $30 in FREE account credit when you complete your annual recertification.
- Manage Your Account: Download our mobile app on the Google Play Store or login online and earn rewards($5 for creating an online account and $5 when you make your first payment through your online account)!

3. If the customer declines, continue with the cancellation using the following script:

   "Please keep in mind that once your services have been disconnected, it can take anywhere from 48 hours up to 30 business days for you to be eligible for Lifeline services again."

4. Closing script:

   "Thank you for calling Assist Wireless. Have a good day."

enTouch Wireless

1. Opening Script:

   "Thank you for calling enTouch Wireless Retention, may I have the phone number or account number you are calling about?"

2. Customer/Agent provides phone/account number
   a. As you are pulling up the account, use the following script to see why the customer is calling in (Avoids an awkward silence).

      " While I pull up the account, can you tell me how I can assist you today?"

   b. If a customer is calling in, have them verify their name and account PIN
      i. If someone else is calling in on behalf of the customer, verify the callers name and search the account notes for an Authorized User note
         1. If note is found, verify the callers name
         2. If note is not found, use the following script to inform the caller that they are not an authorized user:

"I reviewed the account to see if {insert callers name} was an authorized user and I cannot find a note indicating that the account holder gave permission. We would need to speak to the account holder directly to have [insert callers name] added to the account for future access"

3. After the account is verified, summarize the reason for the call or cancellation below and click the link based on the customer's reason for cancellation to view that section.
    - <u>If the customer is wanting to disconnect due to their device being lost or stolen:</u>
    - <u>If the customer is wanting to disconnect to transfer their service to another Lifeline provider</u>
    - <u>If the customer is wanting to disconnect because they are unhappy with the service.</u>
    - <u>If the customer is wanting to disconnect because they are unhappy with their Plan:</u>
    - <u>If the customer is wanting to disconnect due to no longer qualifying for Lifeline service</u>
    - <u>If the customer is wanting to disconnect because they have service with another Lifeline provider</u>

If the customer is wanting to disconnect due to their device being lost or stolen:

1. Run customer through the <u>Retention Calculator Tool</u>
2. Offer the customer the discount off a replacement device generated by the retention calculator. The discount may be redeemed in store, field, or via mail.
    - If the customer selects the store/field option, explain in detail what the discount can be used on.
        - Ex: If the customer receives a $35 discount off a replacement, inform them that this discount is eligible on any device in store and they will be responsible for paying the difference after the discount.
    - If the customer selects the mail out option, use one of the following scripts to explain the type of device they can receive based on their discount.
        - $5 - $45 Discounts

          *"We can provide a discount of (**Insert Discount amount here**) off any device in our warehouse. With your discount, you can receive a smartphone for **(Insert amount of device minus discount; Ex. $45 device minus $15 discount = $30)** plus tax."*
        - $45 Discount

"You qualify to receive a replacement device free of charge. If you'd like to receive the replacement I would just need to verify your shipping address and it should arrive within 3-5 business days"

- If the customer agrees to the replacement device - continue to step 3

- If the customer declines the above discounts, inform the customer that we can send a free SIM card to be used in an unlocked GSM device and use the following script:

  "We can also send you a free sim card in the mail that can be used in any unlocked GSM compatible device such as a T-Mobile, Metro or AT&T phone. All you would need to do once you receive the sim card, is simply insert it into the device and power the device on."

- If customer declines replacement options, ask if there is anything we can do to interest them in continuing their service with enTouch Wireless using the following script:

  "May I ask if there is something specific that you are unhappy with or is there anything we can do to improve your experience with enTouch Wireless and interest you in continuing your service with us?

3. If the customer would like to receive the discount towards the replacement device, accept the discount on the retention calculator so the code can be noted on the customer's account.
   - If the customer would like to have the replacement device mailed, take the payment if applicable and submit the Shipment Request via the jotform.
4. If the customer declines all options, continue with the cancellation using the following script:

   "Please keep in mind that once your services have been disconnected, it can take anywhere from 48 hours up to 30 business days for you to be eligible for Lifeline services again."
5. Closing script:

   "Thank you for calling enTouch Wireless. Have a good day."

If the customer is wanting to disconnect to transfer their service to another Lifeline provider

1. Inform the customer of our competitive plans and the many rewards we offer using the following script:

   "I'm sorry to hear you are leaving our service, prior to doing so I'd like to inform you we are the #1 Service Provider for Free Government Phone Service. We also offer more rewards and perks than ANY other Lifeline provider."

   (Use the list below as reference, choose 2 or 3 per call that best fit the scenario.)

   - New Premium Cell Phones* From Brands You Trust
   - Large Screen, Android Operating System, Brand New
   - The Quality of Our Free Phones With Service Beat The Competition
   - Refill your talk, text, and data for LESS with enTouch Wireless. Get 1GB of Data for only $15!
   - No Contract or Hidden Fees
   - Free International Calling included

2. Ask the customer what the reason for transferring is. Make sure that you include this in the note added to the account.
   - If the customer states they are transferring because they are unhappy with our service
     - Ask if there is anything we can do to improve their experience with enTouch Wireless and interest them in continuing their service using the following script:

       "May I ask if there is something specific that you are unhappy with or is there anything we can do to improve your experience with enTouch Wireless and interest you in continuing your service with us?"
     - Determine if the customer's request is feasible (ex. The customer wants free minutes, data etc.)
       - Offer a one time courtesy top up depending on the customers needs based on the discount amount they qualify for towards a replacement device (ex. If a customer qualifies for a $10 discount, offer a top up that closely equals in value, 200 minutes for $8 etc.)
   - If the customer states they are transferring because they are unhappy with our plans / are being offered a better deal elsewhere
     - Ask what part of their plan they are unhappy with or what better deal is being offered to them using the following script

"May I ask why you are unhappy with your plan or what deal you are being offered elsewhere?"

- Determine what plan the customer is currently on and if we offer a different plan that would better fit their needs or match what the competitor is offering
  - Offer to change the customer's plan if possible to another that might better fit their needs.

- If the customer declines to provide a reason
  - Inform the customer that it would be easier to apply with the provider they are trying to transfer to. If they are approved, their service with us will be automatically disconnected. This would ensure they do not go any period of time without service or have to wait any period of time before re enrolling in Lifeline service using the following script.

    "I'd like to inform you that it would actually be easier to transfer instead of canceling service. All you have to do is simply apply with the provider you would like to transfer to. Once you are approved, your service with enTouch Wireless will be automatically disconnected. This would allow you to have continued service and you would not have to wait any amount of time before enrolling or go through any period of time without cellphone service "

3. If the customer declines all options, continue with the cancellation using the following script:

   "Please keep in mind that once your services have been disconnected, it can take anywhere from 48 hours up to 30 business days for you to be eligible for Lifeline services again."

4. Closing script:

   "Thank you for calling enTouch Wireless. Have a good day."

If the customer is wanting to disconnect because they are unhappy with the service.

1. Ask if there is anything we can do to improve their experience with enTouch Wireless and interest them in continuing their service using the following script:

   "May I ask if there is something specific that you are unhappy with or is there anything we can do to improve your experience with enTouch *Wireless and interest you in continuing your service with us?"*

2. Determine if the customer's request is feasible (ex. The customer wants free minutes, data etc.)
    - Offer a one time courtesy top up depending on the customers needs based on the discount amount they qualify for towards a replacement device (ex. If a customer qualifies for a $10 discount, offer a top up that closely equals in value, 200 minutes for $8 etc.)
3. If the customer declines all options, continue with the cancellation using the following script:

    "Please keep in mind that once your services have been disconnected, it can take anywhere from 48 hours up to 30 business days for you to be eligible for Lifeline services again."
4. Closing script

    "Thank you for calling enTouch Wireless. Have a good day."

If the customer is wanting to disconnect because they are unhappy with their Plan:

1. Ask the customer what part of their plan they are unhappy with using the following script:

    "May I ask why you are unhappy with your plan?"
2. Determine what plan the customer is currently on and if we offer a different plan that would better fit their needs or budget. Mention to the customer that the majority of our plans are completely **FREE.**
    - Offer to upgrade them to a different plan that better fits their needs (if applicable)

ACP + Lifeline Plans

CA Tribal	CA Non-Tribal Broadband	Tribal States	Non-Tribal (excludes KY, CA, & P.R.)	Non-Tribal - Puerto Rico (P.R.)	Non-Tribal Kentucky
$0/mo	$0/mo	$0/mo	$0/mo	$0/mo	$0/mo
Unlimited Text	Unlimited Text	Unlimited Text	Unlimited Text*	Unlimited Text*	Unlimited Text*
Unlimited Minutes	Unlimited Minutes	Unlimited Minutes	Unlimited Minutes*	Unlimited Minutes*	Unlimited Minutes*
Unlimited Data*	Unlimited Data*	Unlimited Data*	10GB Data*	10GB Data*	11GB Data*

Tribal** Lifeline Plans

Base Tribal Lifeline Plan	Unlimited Talk & Text + 5GB	Unlimited Talk & Text + 6GB
FREE	$1	$5
Unlimited Text	Unlimited Text	Unlimited Text
Unlimited Minutes	Unlimited Minutes	Unlimited Minutes
4.5GB Data	5GB Data	6GB Data
Voicemail	Voicemail	Voicemail

Non-Tribal Lifeline Plans

Base Lifeline Plan	1000 Talk, Unlimited Text, 100MB	1200 Talk, Unlimited Text, 250MB	1200 Talk, Unlimited Text, 1GB	Unlimited Talk, Unlimited Text, 4.5GB	Unlimited Talk, Unlimited Text, 5GB	Unlimited Talk, Unlimited Text, 6GB
FREE	$1	$5	$10	$25	$26	$30
500 Text	Unlimited Text	Unlimited Text	Unlimited Text	Unlimited Text	Unlimited Text	Unlimited Text
1000 Minutes	1000 Minutes	1200 Minutes	1200 Minutes	Unlimited Minutes	Unlimited Minutes	Unlimited Minutes
100MB Data	100MB Data	250MB Data	1GB Data	4.5GB Data	5GB Data	6GB Data
Voicemail	Voicemail	Voicemail	Voicemail	Voicemail	Voicemail	Voicemail

California LifeLine Plans

CA Basic Plus	CA Standard Lifeline Plan	CA Tribal Lifeline Plan
FREE	FREE	FREE
Unlimited Text	Unlimited Text	Unlimited Text
Unlimited Minutes	Unlimited Minutes	Unlimited Minutes
4.5GB Data	6GB Data	8GB Data
Voicemail	Voicemail	Voicemail

Kentucky Lifeline Plan

KY Lifeline Plan
FREE
Unlimited Text
Unlimited Minutes
1GB Data
Voicemail

i. *Note: For most states we offer FREE plans Only*

3. If the customer declines all options, continue with the cancellation using the following script:

   "Please keep in mind that once your services have been disconnected, it can take anywhere from 48 hours up to 30 business days for you to be eligible for Lifeline services again."

4. Closing script:

   "Thank you for calling enTouch Wireless. Have a good day."

If the customer is wanting to disconnect due to no longer qualifying for Lifeline service

1. Inform the customer that they have qualified for service until their yearly recertification date and can keep their Lifeline service active (as a backup if they already have another service) and the service will be automatically disconnected once the recertification is not completed using the following script:

   "I'd like to inform you that you qualified for service until your yearly recertification date. You can continue to use your service if you'd like and once the yearly recertification is not completed, your service will be automatically disconnected. Would you be interested in keeping this account active and using it as a backup phone?"

2. If the customer declines, continue with the cancellation using the following script:

   "Please keep in mind that once your services have been disconnected, it can take anywhere from 48 hours up to 30 business days for you to be eligible for Lifeline services again."

3. Closing script:

   "Thank you for calling enTouch Wireless. Have a good day."

If the customer is wanting to disconnect because they have service with another Lifeline provider

1. Ask if there is anything we can do to interest them in continuing their service with enTouch Wireless using the following script:

   "May I ask if there is anything we can do to interest you in continuing your service with us?"

   ○ If customer states they were unaware that they are only allowed to have one active Lifeline service

      i. Ask the customer if they'd be interested in continuing their service with enTouch Wireless versus the other carrier.

2. Inform the customer of our competitive plans and the many rewards we offer using the following script:

   "I'm sorry to hear you are leaving our service, prior to doing so i'd like to inform you we're the #1 Service Provider for Free Government Phone Service. We also offer more rewards and perks than ANY other Lifeline provider."

   (Use the list below as reference, choose 2 or 3 per call that best fit the scenario.)

   - New Premium Cell Phones* From Brands You Trust
   - Large Screen, Android Operating System, Brand New
   - The Quality of Our Free Phones With Service Beat The Competition
   - Refill your talk, text, and data for LESS with enTouch Wireless. Get 1GB of Data for only $15!
   - No Contract or Hidden Fees
   - Free International Calling included
3. If the customer declines, continue with the cancellation using the following script:

   "Please keep in mind that once your services have been disconnected, it can take anywhere from 48 hours up to 30 business days for you to be eligible for Lifeline services again."
4. Closing script:

   "*Thank you for calling enTouch Wireless. Have a good day.*"

SafetyNet Wireless

1. Opening Script:

   "Thank you for calling SafetyNet Wireless Retention, may I have the phone number or account number you are calling about?"
2. Customer/Agent provides phone/account number
   - As you are pulling up the account, use the following script to see why the customer is calling in (Avoids an awkward silence):

     " While I pull up the account, can you tell me how I can assist you today?"
   - If a customer is calling in, have them verify their name and account PIN
     i. If someone else is calling in on behalf of the customer, verify the callers name and search the account notes for an Authorized User note
        1. If note is found, verify the callers name
        2. If note is not found, use the following script to inform the caller that they are not an authorized user:

           "*I reviewed the account to see if {insert callers name} was an authorized user and I cannot find a note indicating that* *the account holder gave permission. We would need to speak to the account holder directly to have [insert callers name] added to the account for future access"*

3. After the account is verified, summarize the reason for the call or cancellation below and click the link based on the customer's reason for cancellation to view that section.
    - If the customer is wanting to disconnect due to their device being lost or stolen:
    - If the customer is wanting to disconnect to transfer their service to another Lifeline provider
    - If the customer is wanting to disconnect because they are unhappy with the service.
    - If the customer is wanting to disconnect due to no longer qualifying for Lifeline service
    - If the customer is wanting to disconnect because they have service with another Lifeline provider

If the customer is wanting to disconnect due to their device being lost or stolen:

1. Run customer through the Retention Calculator Tool
2. Offer the customer a discount off a replacement device to be mailed out using the following scripts:
    - *$5 - $30 Discounts*

      "We can provide a discount of (Insert Discount amount here) off any device in our warehouse. With your discount, you can receive a smartphone for (Insert amount of device minus discount; Ex. $45 device minus $15 discount = $30) plus tax."
3. If the customer declines the above discounts, inform the customer that we can send a free SIM card to be used in an unlocked GSM device and use the following script:
    - GSM

      "We can also send you a free sim card in the mail that can be used in any unlocked GSM compatible device such as a T-Mobile, Metro or AT&T phone. All you would need to do once you receive the sim card, is simply insert it into the device and power the device on."
4. If customer declines replacement options, ask if there is anything we can do to interest them in continuing their service with SafetyNet Wireless using the following script:

   "May I ask if there is anything we can do to interest you in continuing your service with SafetyNet Wireless?"
5. If the customer declines all options, continue with the cancellation using the following script:

"Please keep in mind that once your services have been disconnected, it can take anywhere from 48 hours up to 30 business days for you to be eligible for Lifeline services again."

6. Closing script:

   "Thank you for calling SafetyNet Wireless. Have a good day."

If the customer is wanting to disconnect to transfer their service to another Lifeline provider

1. Inform the customer of our competitive plans and the many rewards we offer using the following script:

   "I'm sorry to hear you are leaving our service, prior to doing so I'd like to inform you we currently offer some of the best plans."

   (Use the list below as reference, choose 2 or 3 per call that best fit the scenario.)

   - (CA) Enjoy the convenience of Free Talk, Text, & Data* Every Month!
   - Refill your talk, text, and data for LESS with SafetyNet Wireless. Get 1GB of Data for only $9.99 or 2GB for $18.99!
   - Easier way to Manage Your Account: Create an account through our SafetyNet Wireless Customer Portal and check your voice, text, and data balance or purchase refills at your own convenience.
2. Ask the customer what the reason for transferring is. Make sure that you include this in the note added to the account.
   - If the customer states they are transferring because they are unhappy with our service
     - Ask if there is anything we can do to improve their experience with SafetyNet Wireless and interest them in continuing their service using the following script:

       "May I ask if there is something specific that you are unhappy with or is there anything we can do to improve your experience with SafetyNet Wireless and interest you in continuing your service with us?"
     - Determine if the customer's request is feasible (ex. The customer wants free minutes, data etc.)
       - Offer a one time courtesy top up depending on the customers needs based on the discount amount they qualify for towards a

replacement device (ex. If a customer qualifies for a $10 discount, offer a top up that closely equals in value,1 GB for $9.99 etc.)

- If the customer declines to provide a reason
    - Inform the customer that it would be easier to apply with the provider they are trying to transfer to. If they are approved, their service with us will be automatically disconnected. This would ensure they do not go any period of time without service or have to wait any period of time before re enrolling in Lifeline service using the following script:

      "I'd like to inform you that it would actually be easier to transfer instead of canceling service. All you have to do is simply apply with the provider you would like to transfer to. Once you are approved, your service with SafetyNet Wireless will be automatically disconnected. This would allow you to have continued service and you would not have to wait any amount of time before enrolling or go through any period of time without cellphone service "

3. If customer declines all options, continue with the cancellation using the following script:

   "Please keep in mind that once your services have been disconnected, it can take anywhere from 48 hours up to 30 business days for you to be eligible for Lifeline services again."

4. Closing script:

   "*Thank you for calling SafetyNet Wireless. Have a good day."*

If the customer is wanting to disconnect because they are unhappy with the service.

1. Ask if there is anything we can do to improve their experience with SafetyNet Wireless and interest them in continuing their service using the following script:

   "May I ask if there is something specific that you are unhappy with or is there anything we can do to improve your experience with SafetyNet *Wireless and interest you in continuing your service with us?"*

2. Determine if the customer's request is feasible (ex. The customer wants free minutes, data etc.)
    a. Offer a one time courtesy top up depending on the customers needs based on the discount amount they qualify for towards a replacement device (ex. If a customer qualifies for a $10 discount, offer a top up that closely equals in value, (1GB for $9.99 etc.)
3. If customer declines all options, continue with the cancellation using the following script:

"Please keep in mind that once your services have been disconnected, it can take anywhere from 48 hours up to 30 business days for you to be eligible for Lifeline services again."

4. Closing script:

   "Thank you for calling SafetyNet Wireless. Have a good day."

If the customer is wanting to disconnect due to no longer qualifying for Lifeline service

1. Inform the customer that they have qualified for service until their yearly recertification date and can keep their Lifeline service active (as a backup if they already have another service) and the service will be automatically disconnected once the recertification is not completed.

   "I'd like to inform you that you qualified for service until your yearly recertification date. You can continue to use your service if you'd like and once the yearly recertification is not completed, your service will be automatically disconnected. Would you be interested in keeping this account active and using it as a backup phone?"
2. If customer declines, continue with the cancellation using the following script:

   "Please keep in mind that once your services have been disconnected, it can take anywhere from 48 hours up to 30 business days for you to be eligible for Lifeline services again."
3. Closing script:

   "Thank you for calling SafetyNet Wireless. Have a good day.

If the customer is wanting to disconnect because they have service with another Lifeline provider

1. Ask if there is anything we can do to interest them in continuing their service with SafetyNet Wireless using the following script:

   "May I ask if there is anything we can do to interest you in continuing your service with us?"
2. If customer states they were unaware that they are only allowed to have one active Lifeline service
   a. Ask the customer if they'd be interested in continuing their service with SafetyNet Wireless versus the other carrier.
3. Inform the customer of our competitive plans and the option to port their phone number from their previous Lifeline provider to us using the following script:

“I’m sorry to hear you are leaving our service, prior to doing so i’d like to inform you we currently offer some of the best plans in the state of California. We also offer the ability to port your phone number from your previous Lifeline provider to SafetyNet Wireless. This would allow you to use our great service and continue to use your same phone number”

(Use the list below as reference, choose 2 or 3 per call that best fit the scenario.)

- (CA) Enjoy the convenience of Free Talk, Text, & Data* Every Month!
- Refill your talk, text, and data for LESS with SafetyNet Wireless. Get 1GB of Data for only $9.99 or 2GB for $18.99!
- Easier way to manage your account: Create an account through our SafetyNet Wireless Customer Portal and check your voice, text, and data balance or purchase refills at your own convenience.

4. If customer declines, continue with the cancellation using the following script:

    “Please keep in mind that once your services have been disconnected, it can take anywhere from 48 hours up to 30 business days for you to be eligible for Lifeline services again.”

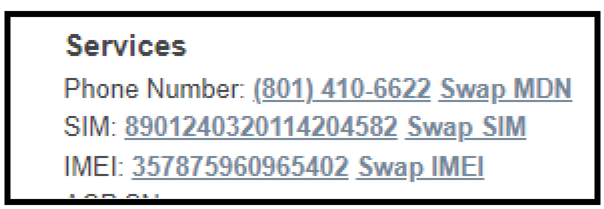
5. Closing script:

    “Thank you for calling SafetyNet Wireless. Have a good day.”

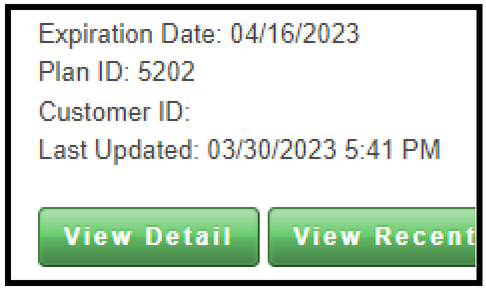
Assist Wireless / enTouch

How to Process a Disconnect

1. Locate the customer’s account in fusion
2. Click the customer’s phone number

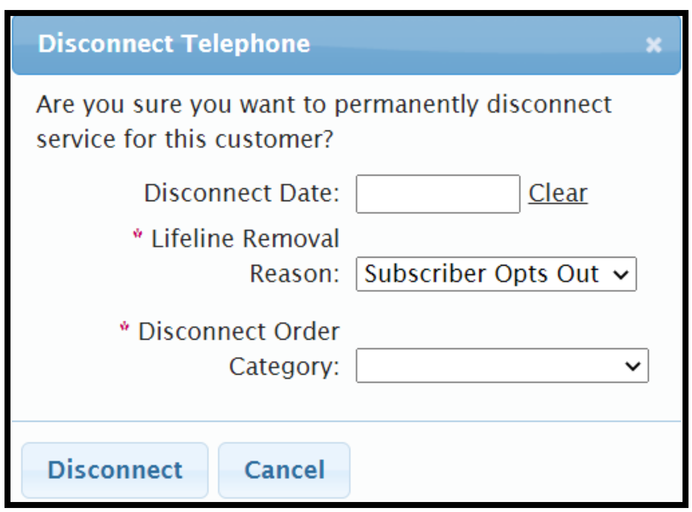


3. Select “View Details”



4. Select “Disconnect Account”

5. Fill in the following information:
    a. Select Today’s Date as the Disconnect Date
    b. Lifeline Removal Reason
        i. Select [Subscriber Opts Out] for customer requested disconnects
    c. Disconnect Order Category
        i. If the category is not listed, Select [Other - Reason Provided in Account Closed Note] *Note:If "Other" is selected, you MUST enter the details/reason of cancellation into the **Account Closed - Customer Request** canned note.*



CGM BYOD Code - Used for BYOD Orders in CGM.
Damaged Device - Customer's device is physicall
Defective Device - Customer's device is defective
Directed by Agent to Disconnect and Re-Enroll - Customer declined discount tow
Failed NLAD - CGM order failed NLAD after Fu
Lost/Stolen Device - Customer's device has been los
Moved Out of Service Area - Customer has moved out of the
No Longer Qualifies for Lifeline Service - Customer no longer qualifies f
No or Poor Coverage - Customer does not have reliabl
Not Satisfied with Plan Offering - Customer is not satisfied with
Other - Reason provided in "Account Cl
Transferring to Another Provider - Customer is transferring their

Editing Inventory

Agents will request changes to their inventory such as making units available for use or reassign to a different agent. Inventory should only be made available or re-assigned to the agent that has the device in hand. If the agent needs more than 5 units edited, they must submit the request via email to inventory@viaoneservices.com. There is a 2 hour turnaround time for inventory email processing.

UPDATE : Effective Monday, April 10th, 2023, we will NO LONGER transfer inventory via phone calls. All Inventory transfers will need to be sent via chat or email.

Inventory Statuses and Definitions

- **Available** - Unit is available for use
- **Sold** - Unit is sold/assigned to a customer's account
- **Review** - Unit has been removed from an account, typically for a warranty swap and will be reviewed and either made back available for re-use or removed
- **Removed** - Unit has been Removed from inventory due to lost/stolen or returned to the warehouse
    - Can be made available for re-use at the agent/customer's request
- **RMA** - Unit is in transit to warehouse
- **Purged** - disassociates inventory units from customer accounts
- **Reserved** - Unit is reserved to a customer's account but not fully "SOLD" yet due to an error

Note: The Sales Support team will NOT change inventory to "**REMOVED**" status OR reassign inventory to a different agent ID other than the one requesting it.

- **IF an agent believes a device should be removed from their inventory or should not be in available status,** please have them contact their master agent or submit the device in their chargeback disputes.

BEFORE PROCESSING INVENTORY TRANSFERS:

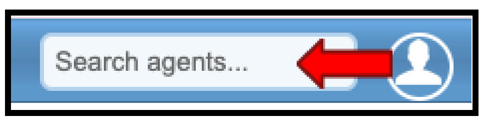
Before processing inventory transfers you MUST verify that the agent ID you are given matches the name of the Agent you are transferring the inventory to BEFORE you begin the transfer process:

- Example; If you receive a request to transfer inventory to Maritza, agent ID 1234, however when verifying the agent ID you notice that Maritza's agent ID is actually 1256, you would respond to the email and ask for the correct agent ID.
    - *"Unfortunately Maritza's agent ID is Not 1234. Please provide the correct agent ID and we will gladly process your request. "*

To verify Agent's ID

1. Log in to Fusion and select the [Agent] tab

2. Enter the Agent ID you were given in the [Search Agents] box



3. Verify that the name on the Agent's account matches what was provided
    a. Agent provided agent ID 13780 for Israel Miller, however agent ID 13780 belongs to Latricia Henderson. In this instance you would respond to the email and ask for the correct agent ID for Israel to be provided.
        i. Keep in mind that requests can come in from Stores therefore the agent might just send an agent ID and not an agent's name. (Example agent 3498 Direct Sales professionals)

b. If the agent ID matches the name provided, you can process the inventory transfer

4. It is CRUCIAL that we complete this verification before processing inventory transfers as assigning inventory to the incorrect agent can result in the incorrect agent being charged back for the devices.

To edit inventory for the agent, follow the steps below:

SIMs

SIMs are not to be reused unless it is a Prepaid to Lifeline transaction. Once a SIM has been used, it cannot be reused and should be discarded by the agent.

enTouch Wireless SIMs should NOT be assigned to a specific agent ID/account. The warehouse for these SIMs should be [Boomerang Wireless] with no specified agent account number. Assigning sims to a specific agent account number will cause errors in CGM.

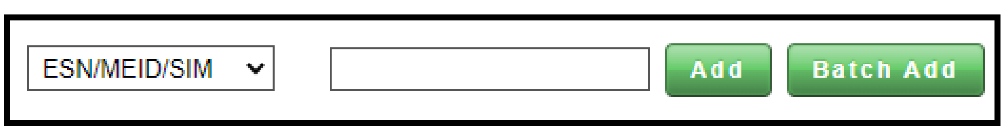
To Transfer Assist Wireless SIMs

Before proceeding with the inventory transfer, verify that the SIMs are currently in Available status.

1. Log in to Fusion and select the [Inventory] tab

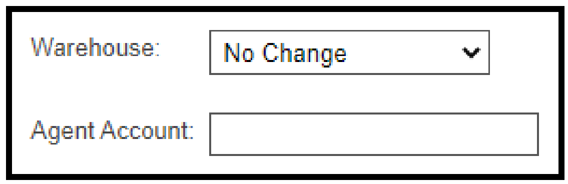
2. Select [Edit Inventory] under the Action Menu

3. Enter the SIM or select [Batch Add] to edit multiple SIMs



4. Click [Edit Inventory]

5. Change the Agent ID and Warehouse (if applicable) to the new agent id and click update inventory.
    a. For Retail agents - the Agent ID and Warehouse will need to be changed
    b. For Field agents - only the Agent ID should be changed
    c. NO other changes should be made



IMEIs

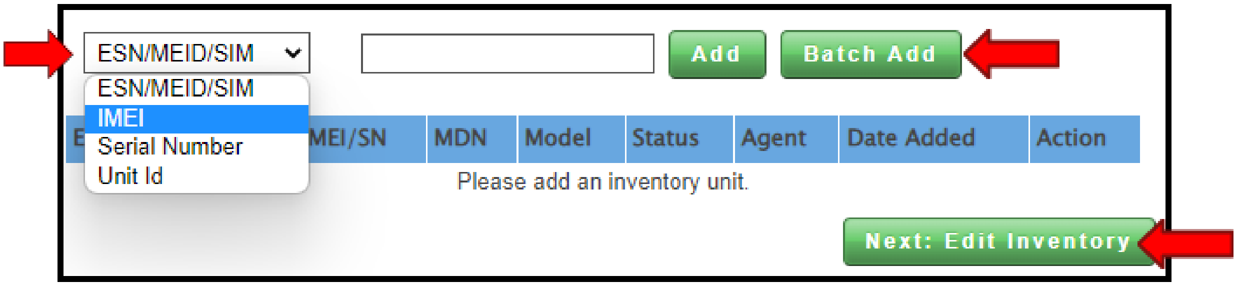
To make IMEIs Available

1. Search IMEI in Inventory tabs of Fusion to verify the IMEI is not sold and attached to an Active account. If the device is the main device on an active account, we will not make it available for the agent.

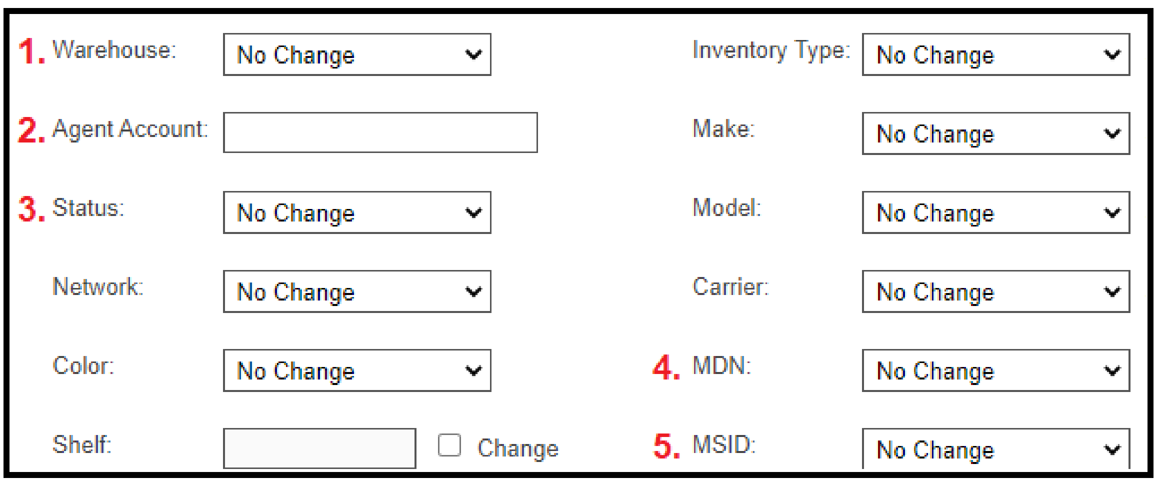
2. If the device is not sold to an active account, Select [Purge Unit]

3. Click [Edit Inventory] under the [Action] Menu

4. Change the dropdown menu to [IMEI], enter the IMEI to be made available and click [Edit Inventory]



5. Update the following information
    a. Warehouse ID (if applicable)
    b. Agent Account (if applicable)
    c. Update the Status to [**Available**]
    d. Clear the MDN
    e. Clear the MSID
6. Click [Update Inventory]

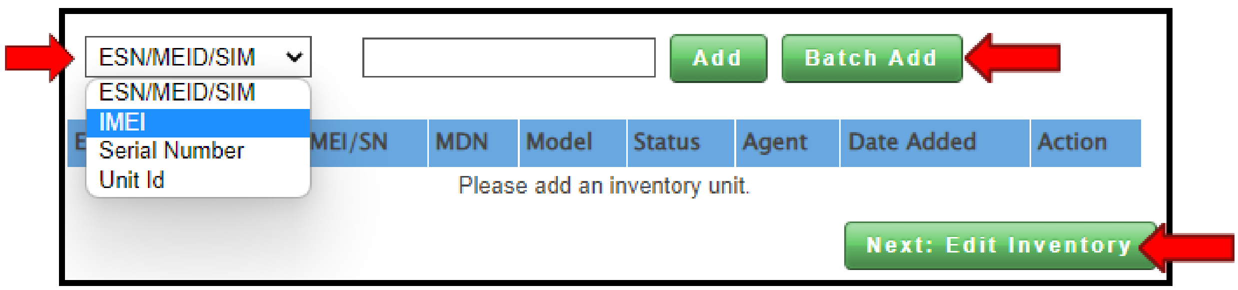


To Transfer IMEIs

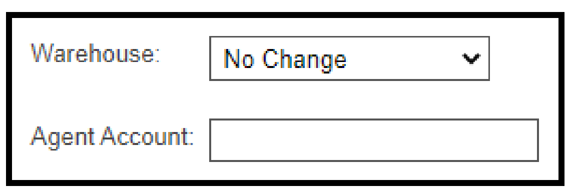
1. Log in to Fusion and select the [Inventory] tab

2. Select [Edit Inventory] under the Action Menu

3. Change the dropdown menu to [IMEI], enter the IMEI to be made available OR select [Batch Add] for multiple IMEIs, then click [Edit Inventory]



6. Change the Agent ID and Warehouse (if applicable) to the new agent id
    a. For Retail agents - the Agent ID and Warehouse will need to be changed
    b. For Field agents - only the Agent ID should be changed
    c. NO other changes should be made



Pre-Activating SIMs

****IMPORTANT NOTICE****

Effective immediately, when preactivating SIMs, ***the SIMs must be assigned to the agent requesting the preactivation (for Assist Wireless only)***. If the preactivated sim is not used within

30 days, the agent will be charged back. UNDER NO CIRCUMSTANCE should you preactivate SIMS without first assigning them to the agent.

Additionally, We must ask the agent for the tribal designation to determine the appropriate plan to use when preactivating.

Plans to use:

- OK Tribal Unlimited Talk/Text/4GB
- OK Non-Tribal 300 Talk/300 Text/4.5GB
- CA Tribal Unlimited Talk/Text/8GB
- CA Non-Tribal Unlimited Talk/Text/6GB

Common Area Codes

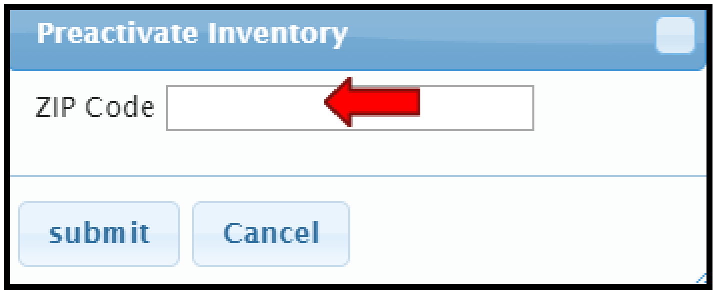
- OK 580 area code - Zip Code **73501**
- OK 918/539 area code - Zip Code **74102**
- OK 405/572 area code - **73104 - NON TRIBAL**

Plintron - Single SIM (Currently not activating on Plintron)

1. Search SIM in Inventory tab of Fusion to verify the SIM is in available Status
2. Reassign the SIM to the agent request the preactivation

3. Search for the SIM card under "Unit Browser" in the inventory tab
4. Click "Preactivate" on the bottom right of the screen

5. Add the Zip Code and click submit



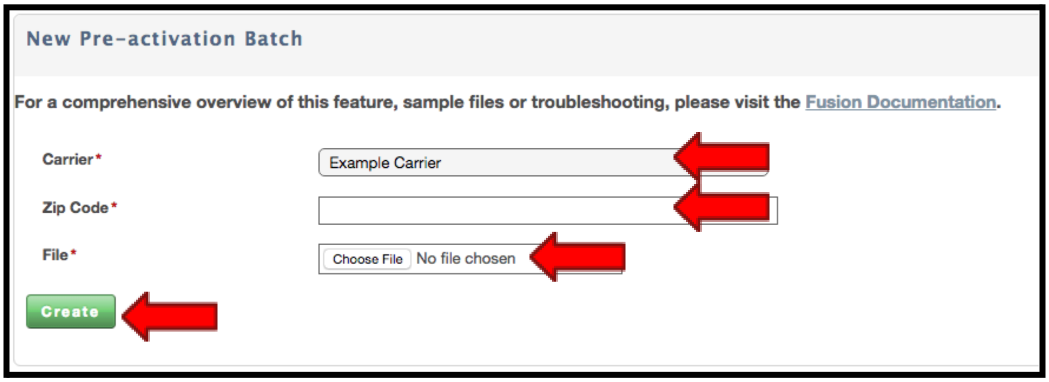
6. Refresh the page or search for the SIM again to reflect the mdn assigned

Plintron - Multiple SIMs

1. Create .csv file with the SIM numbers
    a. Google sheets can be used if you do not have access to Excel
        i. Note that the column with the SIM numbers MUST be in Text format, so that the information is not changed when downloading and uploading the file
        ii. Example File.csv
2. In Fusion Inventory, click on Pre-activation Batches

3. Click on [New Batch Pre-Activation]

4. Select Plintron ITG in the carrier field
5. Enter in the Zip Code
6. Upload .CSV file
7. Click [Create]



PWG SIMS

[Assist Wireless Login](#):

a. Username: AssistGSM
b. Password: ZJBT5MNSPNWDC3Y

[Entouch Wireless Login](#):

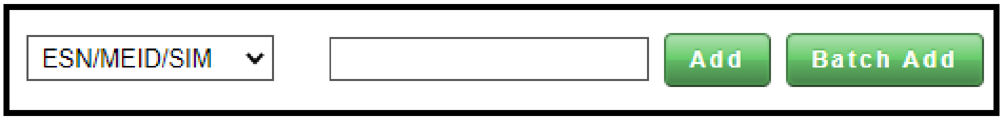
a. Username: readywireless
b. Password: Q28OBBWLFEOTI12

PWG - Single SIMs

1. Log in to Fusion and select the [Inventory] tab

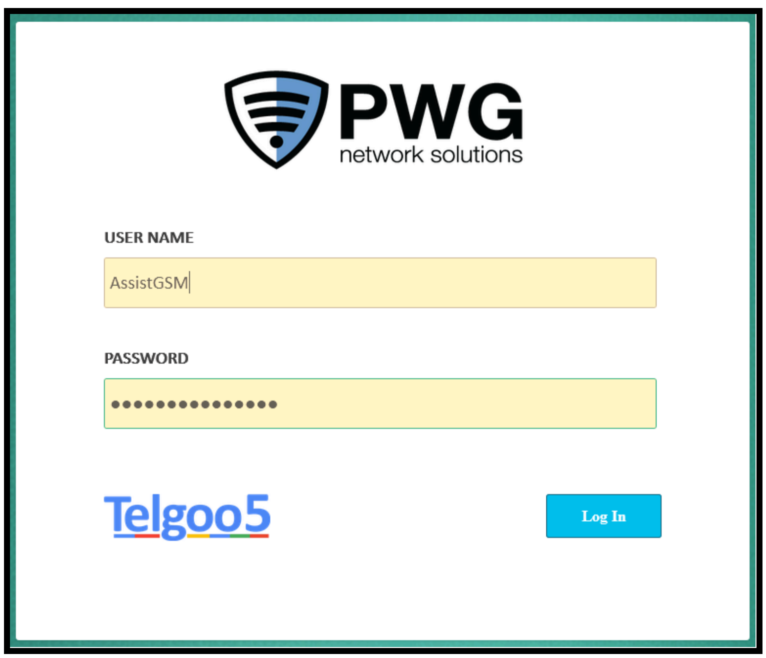
2. Select [Edit Inventory] under the Action Menu

3. Enter the SIM or select [Batch Add] to edit multiple SIMs

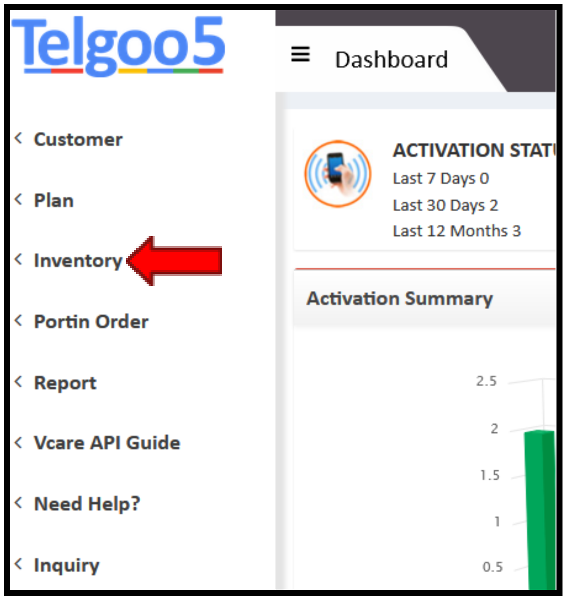


4. Click [Edit Inventory]

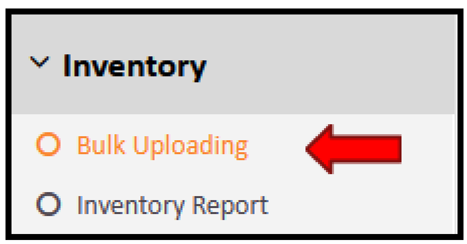
5. Change the Agent ID and Warehouse (if applicable) to the agent requesting the preactivation
6. Log in to the PWG MVNO Portal
   a. https://www.telgoo5ocs.com/api/telgoo5/index.php
   b. Username: AssistGSM
   c. Password: ZJBT5MNSPNWDC3Y



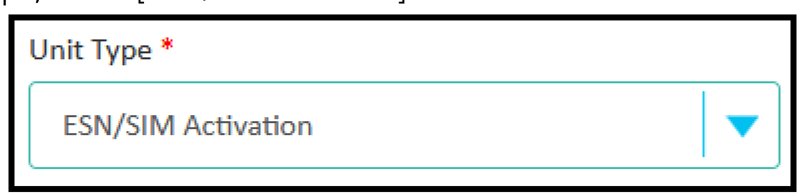
7. Select [Inventory] from the menu on the left



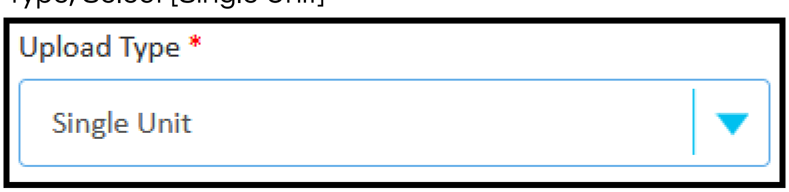
8. Select [Bulk Uploading]



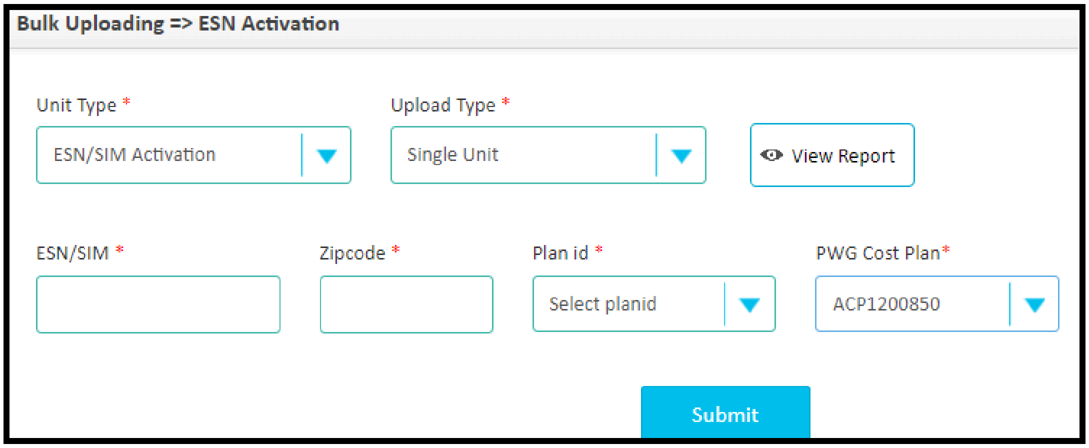
9. Under Unit Type, Select [ESN/SIM Activation]



10. Under Upload Type, Select [Single Unit]



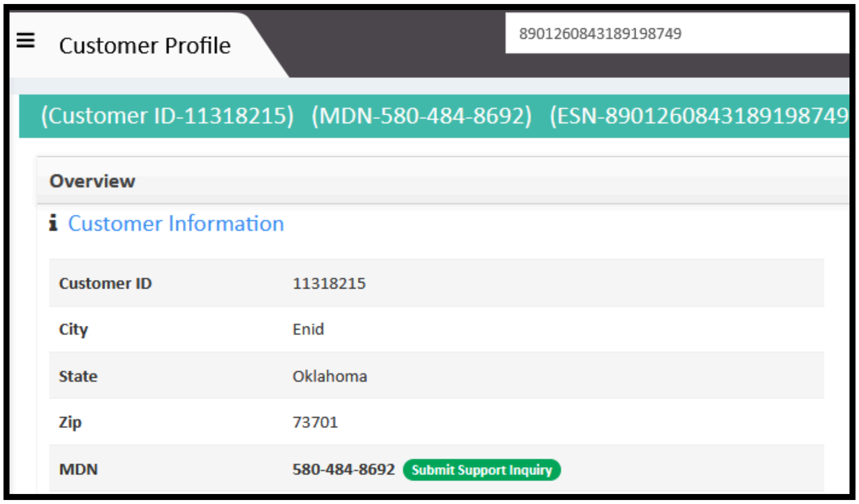
11. Enter the SIM number, Zip Code & Plan ID & PWG Cost Plan then Click [Submit]
    a. PWG Cost Plan: ACP1200850



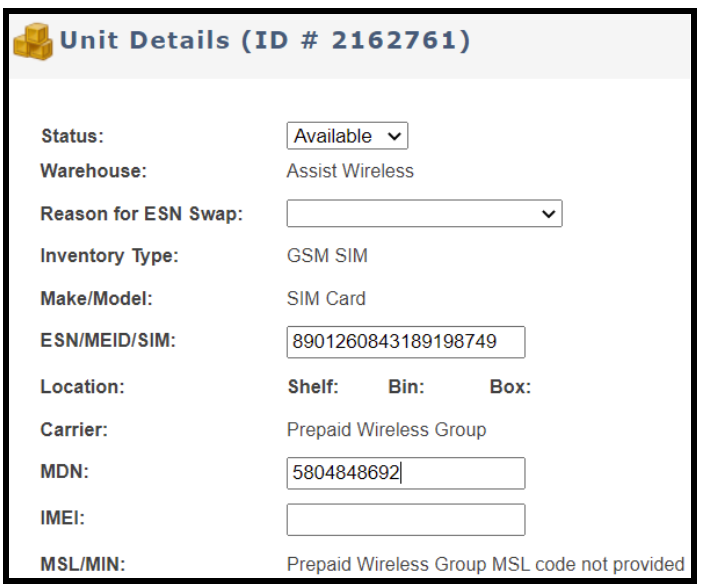
12. If the Process is successful you will receive the following message

13. Search for the SIM card

14. Locate the new MDN associated with the SIM card & make note of it.



15. Go to the [Inventory Tab] in Fusion
16. Search for the SIM card
17. Update the [MDN]



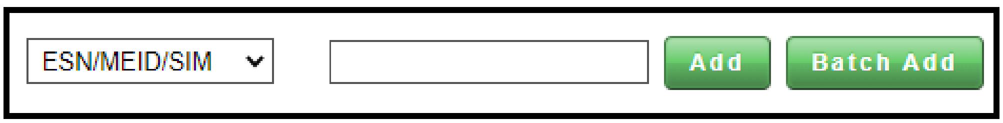
18. Click [Update Unit]

PWG - Multiple SIMs

1. Log in to Fusion and select the [Inventory] tab

2. Select [Edit Inventory] under the Action Menu

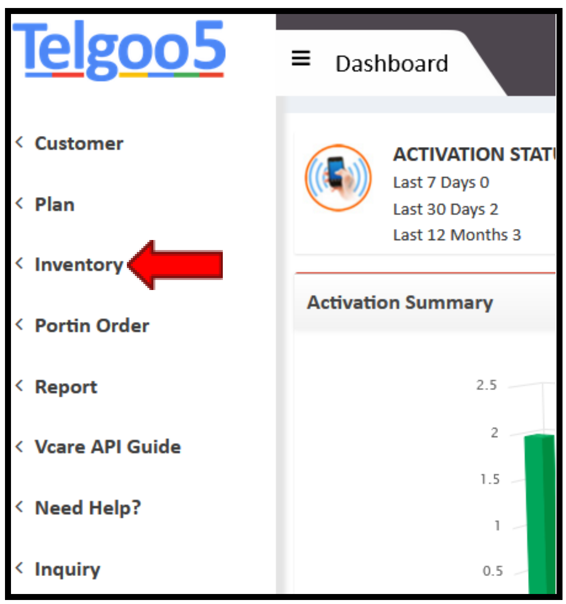
3. Enter the SIM or select [Batch Add] to edit multiple SIMs



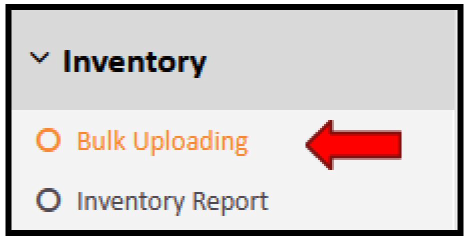
4. Click [Edit Inventory]

5. Change the Agent ID and Warehouse (if applicable) to the agent requesting the preactivation
6. Create .csv file with the SIM numbers, desired zip code and plan ID
    a. Google sheets can be used if you do not have access to Excel
        i. Note that the column with the SIM numbers MUST be in Text format, so that the information is not changed when downloading and uploading the file
        ii. Header : ESN, Zip, Plan ID
7. Log in to the PWG MVNO Portal
    a. https://www.telgoo5ocs.com/api/telgoo5/index.php
    b. Username: AssistGSM
    c. Password: ZJBT5MNSPNWDC3Y

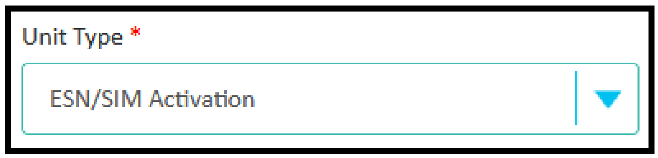
8. Select [Inventory] from the menu on the left



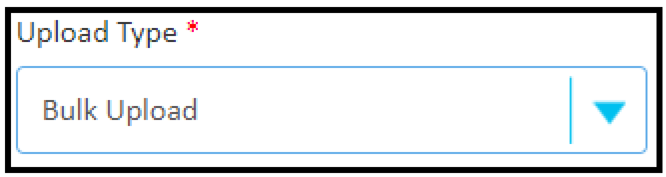
9. Select [Bulk Uploading]



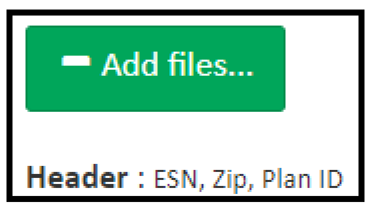
10. Under Unit Type, Select [ESN/SIM Activation]



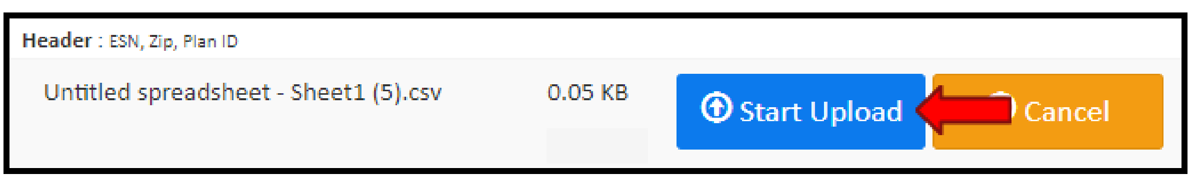
11. Under Upload Type, Select [Bulk Upload]



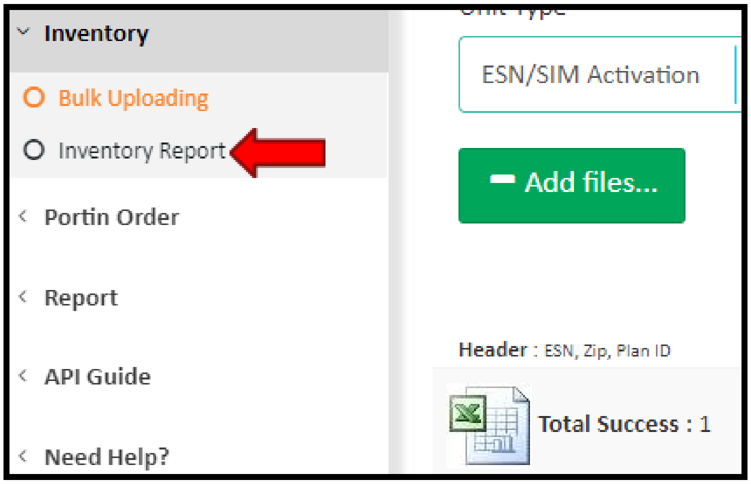
12. Click [Add Files]



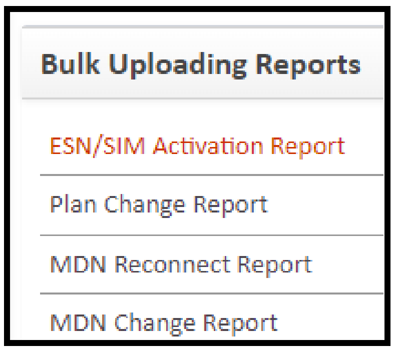
13. Select [Start Upload]



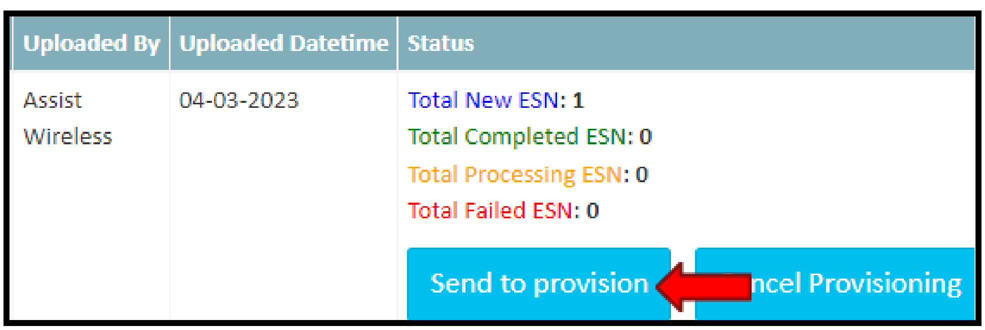
14. When the file is successfully uploaded, click [Inventory Reports] under Inventory



15. Select [ESN/SIM Activation Report]

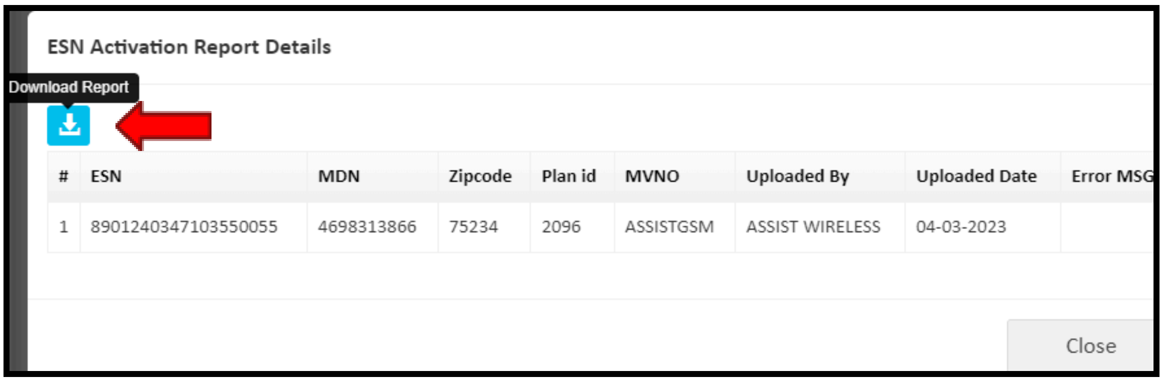


16. Click [Send to Provision]



17. Once the provisioning is complete, click the batch number to view the report

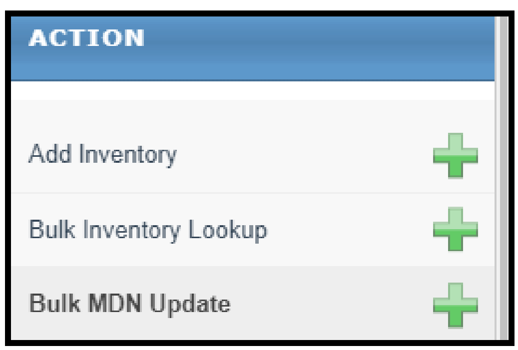
18. Download the report



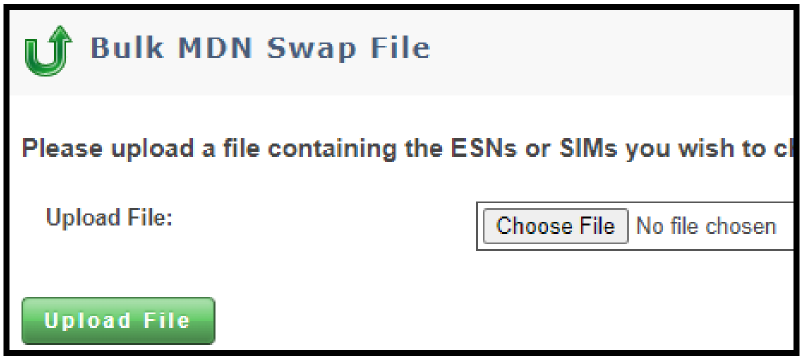
19. Create a new csv. file with the SIMs and new phone numbers to update in Fusion

ESN	New MDN
2.68435E+17	5015394767
2.68435E+17	5018134052

20. Select the inventory tab in Fusion
21. Select [Bulk MDN Update] under the Actions menu



22. Choose the file and click [Upload File]



23. Verify that the phone numbers have updated by checking the SIMs in the unit browser.

MVNO Connect SIMS

Single SIMS

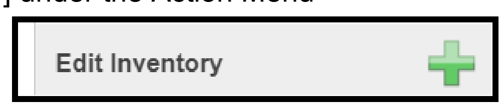
Link: MVNO Connect Telgoo

Entouch Wireless Login:

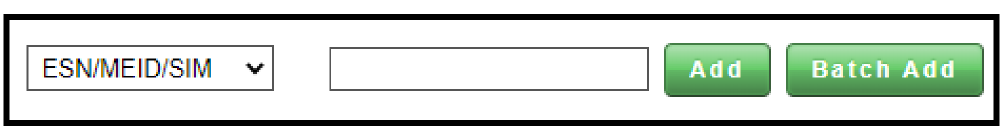
a. Username: enTouch.Wireless
b. Password: COzevUw=3r$

1. Log in to Fusion and select the [Inventory] tab

2. Select [Edit Inventory] under the Action Menu



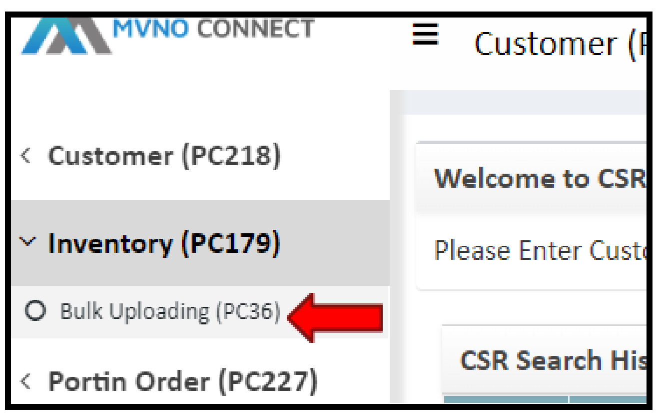
3. Enter the SIM or select [Batch Add] to edit multiple SIMs



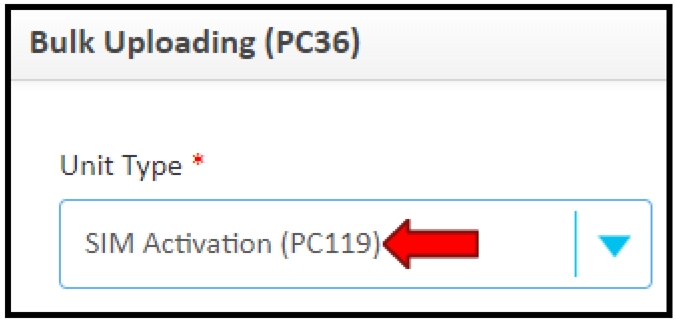
4. Click [Edit Inventory]

5. Change the Agent ID and Warehouse (if applicable) to the agent requesting the preactivation
6. Log in to the MVNO Connect Portal
    a. https://www.telgoo5ocs.com/api/telgoo5/index.php
    b. Username: **enTouch.Wireless**
    c. Password: **COzevUw=3r$**

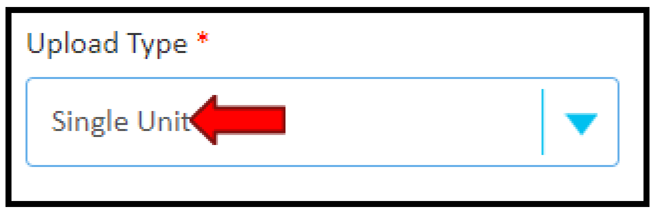
7. Under the Inventory tab, select [Bulk Uploading]



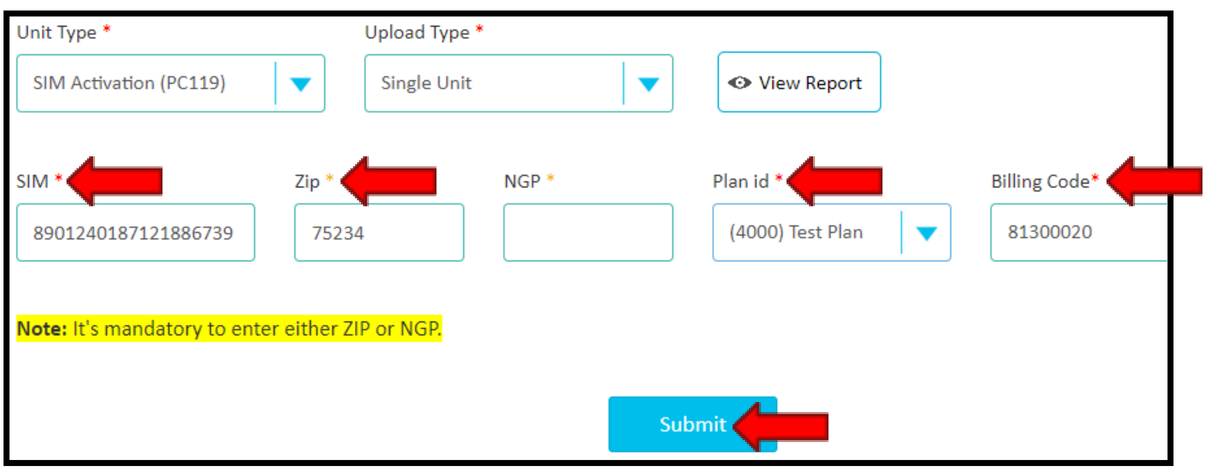
8. Under [Unit Type] select [Sim Activation]



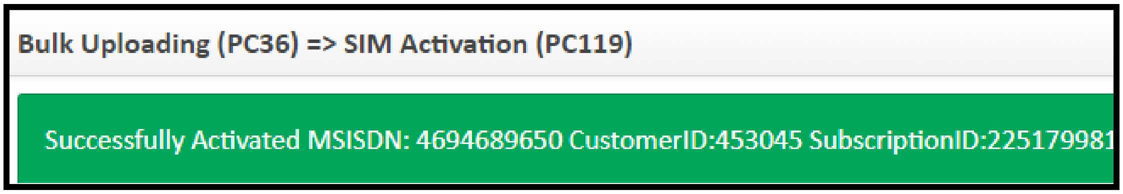
9. Under [Upload Type], select [Single Unit]



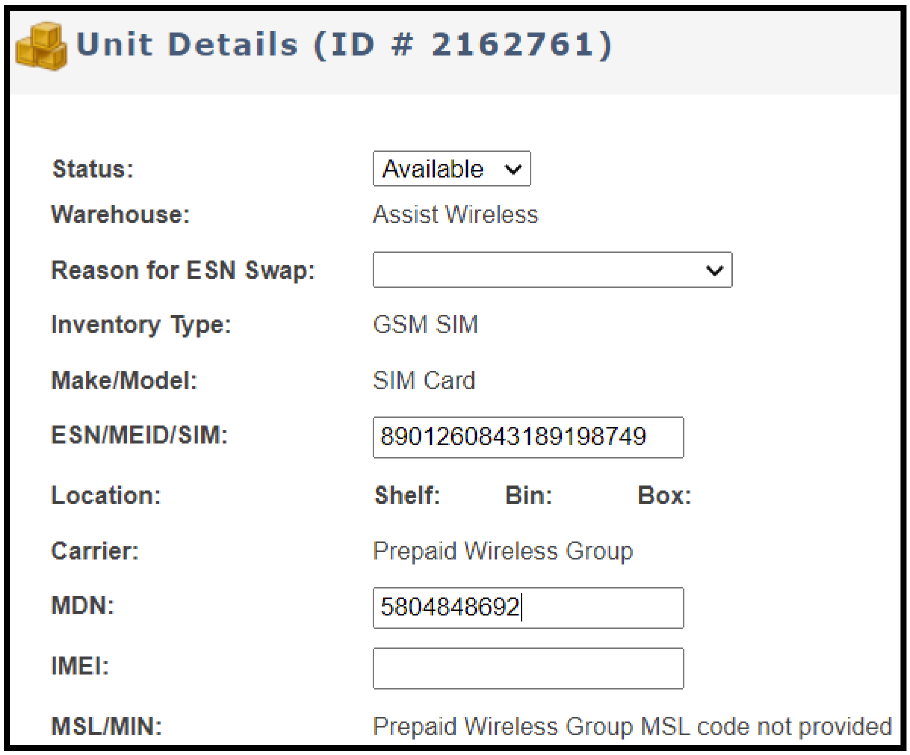
10. Enter in the following information then click [Submit]. *Note: nothing needs to be entered for NGP*
    a. SIM number
    b. Zip Code
    c. Plan ID: Select plan based on the customer's account
    d. Billing Code: 81300020



11. If the preactivation is successful, a green message will appear displaying the phone number that was assigned to the SIM.



12. Go to the [Inventory Tab] in Fusion
13. Search for the SIM card
14. Update the [MDN]



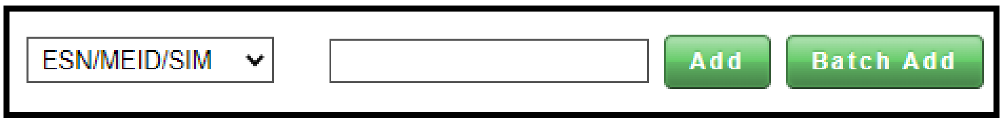
15. Click [Update Unit]

Multiple SIMS

1. Log in to Fusion and select the [Inventory] tab

2. Select [Edit Inventory] under the Action Menu

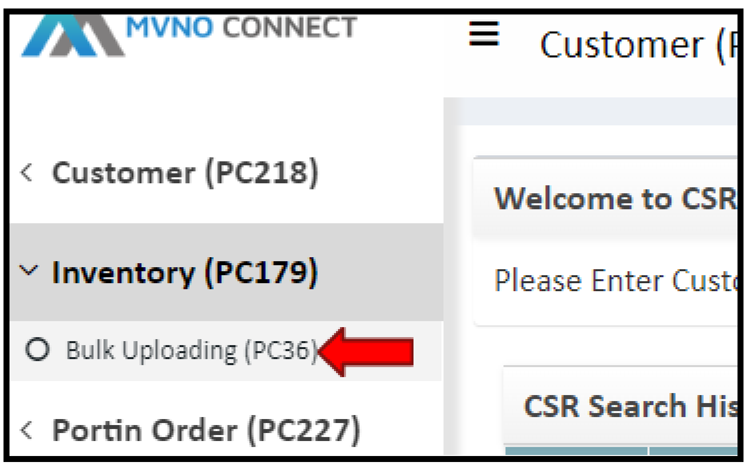
3. Enter the SIM or select [Batch Add] to edit multiple SIMs



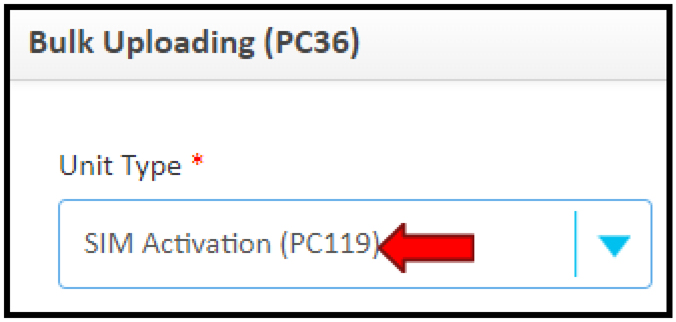
4. Click [Edit Inventory]

5. Change the Agent ID and Warehouse (if applicable) to the agent requesting the preactivation
6. Log in to the MVNO Connect Portal
    a. https://www.telgoo5ocs.com/api/telgoo5/index.php
    b. Username: **enTouch.Wireless**
    c. Password: **COzevUw=3r$**

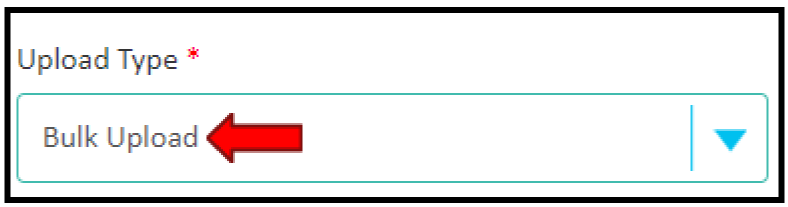
7. Under the Inventory tab, select [Bulk Uploading]



8. Under [Unit Type] select [Sim Activation]



9. Under [Upload Type] select [Bulk Upload]



10. Save and download the list of sims to be preactivated as a .csv file using the header below
    a. SIM, Zip, NGP, Plan ID ,Billing Code
        i. Note: The NGP column can be left blank
        ii. Plan ID

(4000) Test Plan
(4003) ACP Tribal 2500T/4000Text/23GB
(4004) ACP Non-Tribal 2500T/4000Text/5.6GB
(4005) ACP Non-Tribal 2500T/4000Text/10GB
(4006) ACP Tribal 2500T/4000Text/25GB
(4007) ACP Non-Tribal 2500T/4000Text/14GB
(4008) ACP Non-Tribal 2500T/4000Text/6.5GB
(4009) ACP Tribal 2500T/4000Text/18.5GB
(4010) ACP Non-Tribal 2500T/4000Text/5.5GB
(4011) ACP Tribal 2500T/4000Text/17GB
(4012) ACP Non-Tribal 2500T/4000Text/8GB
(4013) ACP Non-Tribal 2500T/4000Text/2GB
(4014) Lifeline 2500T/4000Text/8GB
(4015) Lifeline 2500T/4000Text/6GB
(4016) Lifeline 2500T/4000Text/4.5GB
(4017) Lifeline 1100T/4000Text
(4018) Lifeline 50T/50Text/4.5GB
(4019) Lifeline 1000T/500Text/100mb
(4020) Prepaid Base Plan
(4021) ACP Non-Tribal 2500T/4000Text/12GB
(4022) ACP Non-Tribal 2500T/4000Text/7.5GB
(4023) Corporate 5000T/20000Text/10GB
(4024) Lifeline 2500T/4000Text/1GB
(4025) ACP Non-Tribal 2500T/4000Text/6.5GB
(4026) ACP Non-Tribal 2500T/4000Text/11GB
(4058) Preactivation Bundle

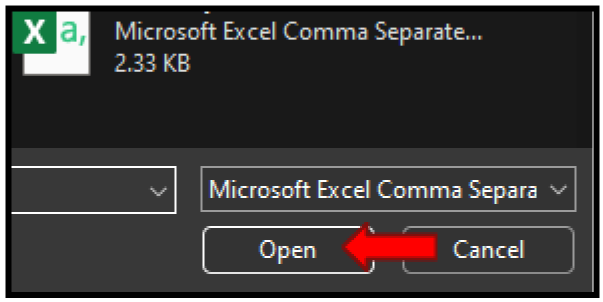
iii. Billing Code: 81300020

iv. You can choose to download a sample file.

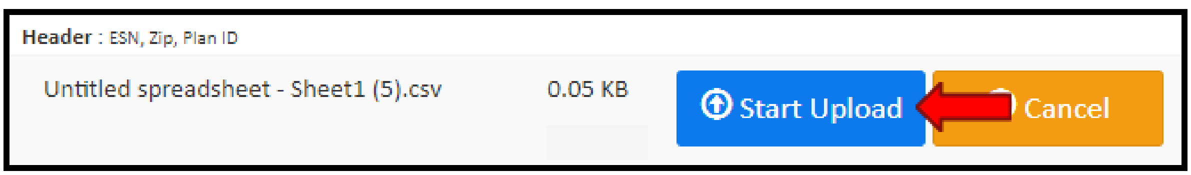
	A	B	C	D	E
1	SIM	Zip	NGP	Plan ID	Billing Code
2					
3					
4					
5					
6					

11. Click [Add Files]

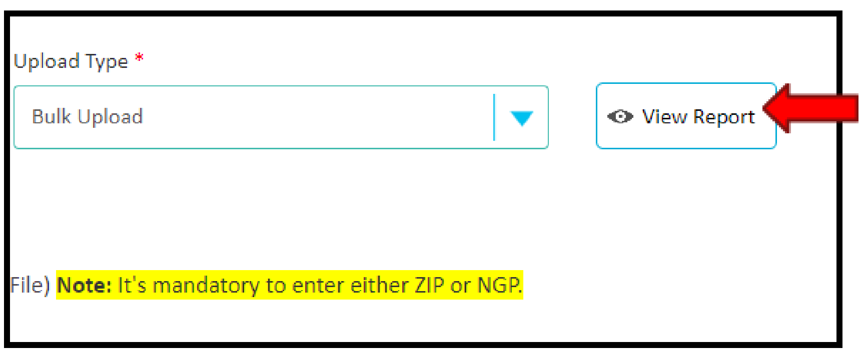
12. Select the File and click [Open]



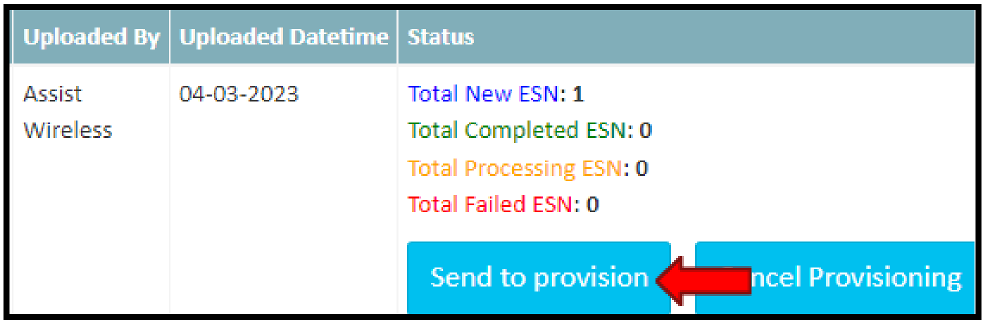
13. Select [Start Upload]



14. When the file is successfully uploaded, click [View Reports]

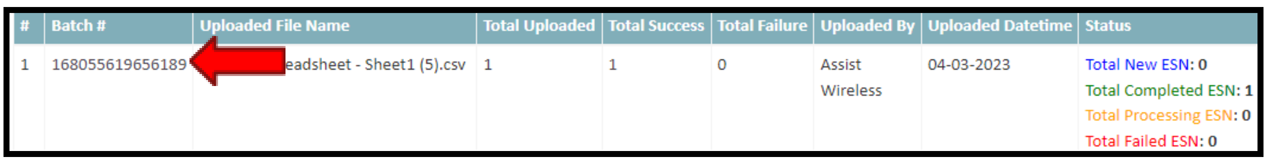


15. Click [Send to Provision]



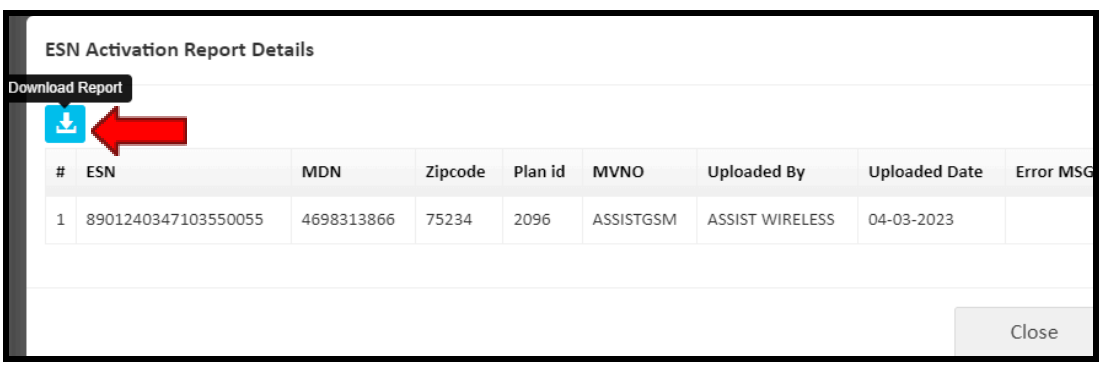
Uploaded By	Uploaded Datetime	Status
Assist Wireless	04-03-2023	Total New ESN: 1 Total Completed ESN: 0 Total Processing ESN: 0 Total Failed ESN: 0 Send to provision / ncel Provisioning

16. Once the provisioning is complete, click the batch number to view the report



#	Batch #	Uploaded File Name	Total Uploaded	Total Success	Total Failure	Uploaded By	Uploaded Datetime	Status
1	168055619656189	eadsheet - Sheet1 (5).csv	1	1	0	Assist Wireless	04-03-2023	Total New ESN: 0 Total Completed ESN: 1 Total Processing ESN: 0 Total Failed ESN: 0

17. Download the report



ESN Activation Report Details

Download Report

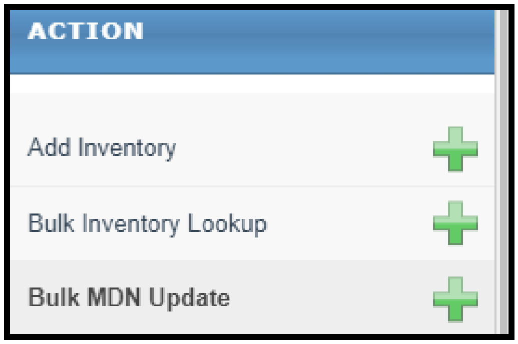
#	ESN	MDN	Zipcode	Plan id	MVNO	Uploaded By	Uploaded Date	Error MSG
1	8901240347103550055	4698313866	75234	2096	ASSISTGSM	ASSIST WIRELESS	04-03-2023	

Close

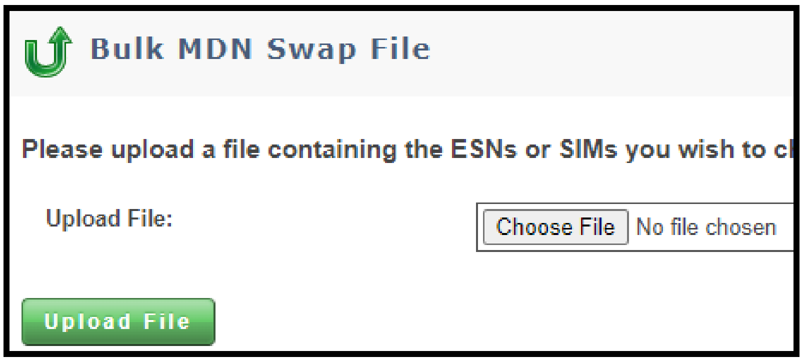
18. Create a new csv. file with the SIMs and new phone numbers to update in Fusion

ESN	New MDN
2.68435E+17	5015394767
2.68435E+17	5018134052

19. Select the inventory tab in Fusion
20. Select [Bulk MDN Update] under the Actions menu



21. Choose the file and click [Upload File]



22. Verify that the phone numbers have updated by checking the SIMs in the unit browser.

Inventory Chargebacks for Invalid Transactions

If an agent sells a device to an account and does not swap or is unable to swap the device due to an error, they must reach out to Agent Relations to either resolve the error or have the invoice (and payment, if necessary) voided, and the device updated to Available status.

Devices that are sold but not attached (swapped) to a customer's account will be updated to SNS status in Fusion and will be charged to the agent when they age out (60 days).* These devices will not be able to be sold or swapped to an account unless the agent contacts Agent Relations to have the inventory moved back to Available status. All devices in SNS status will be shown in DOMO for the ISOs to review.

*Note that swapping from a GSM device (SIM card/IMEI) to a CDMA device will leave the IMEI in Sold status and will result in a chargeback if the agent does not contact Agent Relations to have the device moved to the correct status - Agent Relations will update the status of the IMEI to match the status of the SIM card, based on the Swap Reason Code selected and discount applied (if any) by the agent.

Device & SIM Swaps

Swaps are changes of a device (ESN or IMEI) or SIM on a customer's accounts. Agents will call in for assistance with swaps either because they do not have access to Fusion or because they are receiving a specific error and need us to correct it for the swap to complete.

Customers might want to change a handset when upgrading or replacing a handset that is either damaged, lost or stolen. There is no set limit to the number of times a customer does an ESN Swap.

Assist Wireless

Types of Swaps

- Love Your Phone - 100% Off (Non-Tribal)
- Love Your Phone - Up to $65 Off (Tribal)
- Warranty - 100% Off
- Winback - authorized
- No Discount

Store Agents are able to charge a $5 swap fee on all swaps *except for:*

- LYP
- Warranty
- Winback - Authorized

enTouch Wireless

Types of Swaps

- Warranty - 100% Off
- Winback - authorized
- No Discount

Warranty Periods

Listed below are the warranty periods for Assist & enTouch Wireless. The warranty period begins the day the device is activated on the account.

- To determine the warranty period, go into the inventory history and see how long the customer has had their most recent device
- Refurbished devices have a **30 day warranty.**
- New devices have a **30 day warranty.**

- All Warranty Periods reset when the customer has a new device successfully swaps onto the account.
- Warranty does **NOT** cover lost, stolen or damaged devices. Customers can purchase a replacement phone by calling into our customer service center.
- Inventory types that are **Prior Assist** or **BYOD** do **NOT** have a warranty period.

Examples of Issues covered by Warranty:
- Unable to power the device on due to phone software issue
- Buttons on the device are non-responsive
- Phone screen is unresponsive
- Phone speaker or microphone is non-responsive at time of sale
- Device won't charge with no obvious damage to USB port

How to obtain a replacement device under Warranty

If the customer would like to obtain a replacement due to the fact that the phone is defective and the phone is under warranty, they can do one of the following:
- Obtain a warranty swap at a store or with a field agent
- If there is no nearby store/agent; The customer can request a replacement by mail. We will send a pre stamped envelope to send the device back to our warehouse to be replaced.
    - The customer must send the following before the replacement phone will be shipped to them.
        - Phone
        - Battery
        - Charger
        - Note explaining what is wrong with the device
        - Remove lock screen passwords
        - Contact information - phone number and email (the customer must be under Warranty in order to get a free replacement)
        - This information must be sent to the Repair Center within their warranty period or the customer will have to pay for a replacement device:
- The replacement will be sent to the customer as soon as the main office receives the device and they have determined that it is defective and covered under warranty.

ViaOne Services Warehouse
8607 Ambassador Row
Suite 100
Dallas, TX 75247

*****TSB Warranty Process****

We will have a new Master ISO group doing distributions in Washington, Mississippi, North Dakota and Minnesota. They will be distributing their own devices (Inventory Type = $50 Phone - IMEI (TSB)), but we will be providing the SIMs. Because of this, the warranty process will also differ from the other Cali D/Entouch customers.

- If the Customer Service or Agent Relations groups receive a call from a customer about a defective device and they are still within the **30 day warranty period,** please transfer the call to one of the following numbers IF the account was created by a ***V1_TSB agent*** and/or the inventory type of the device is "***$50 Phone - IMEI (TSB)***"
    - Myron Sears: 352.547.5567
    - Arianna Barnett: 352.547.5595:

*****Panda Mobile Warranty Process*****

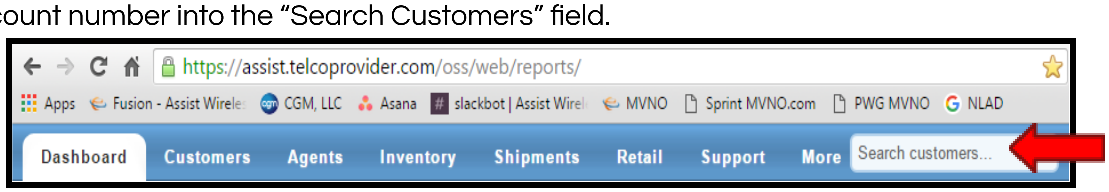
Panda Mobile is a new Master ISO group doing distributions for enTouch Wireless. They will be distributing their own devices, **Model Moxee 2303**, but we will be providing the SIMs. Because of this, the warranty process will also differ from the other Entouch customers.

- If the Customer Service or Agent Relations groups receive a call from a customer about a defective device and they are still within the **30 day warranty period,** please email Shawna and Greg for pre stamped envelope requests. This would be for all Moxee 2303 devices/V1_PAN customers.
    - Shawna email Shawna@pandamobile.com CC gregh@pandamobile.com
    - If we receive disconnect requests from V1_PAN agent customers, process the disconnect.

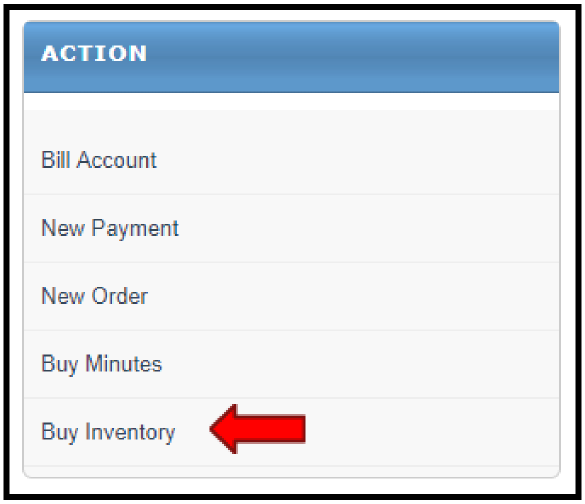
Assist Wireless / enTouch Wireless SIM & IMEI Swaps

To begin processing a swap you must first "**Buy**" the inventory being swapped onto the account.

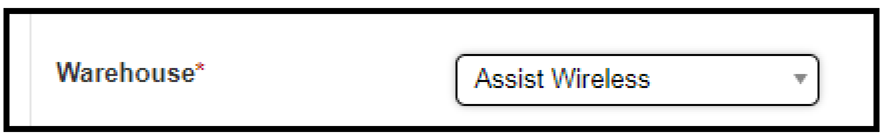
1. Log in to Fusion and search for the customer's profile by entering the phone number or account number into the "Search Customers" field.



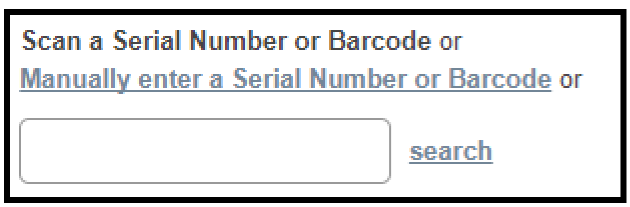
2. Click "Buy Inventory" on the customer's Overview page.



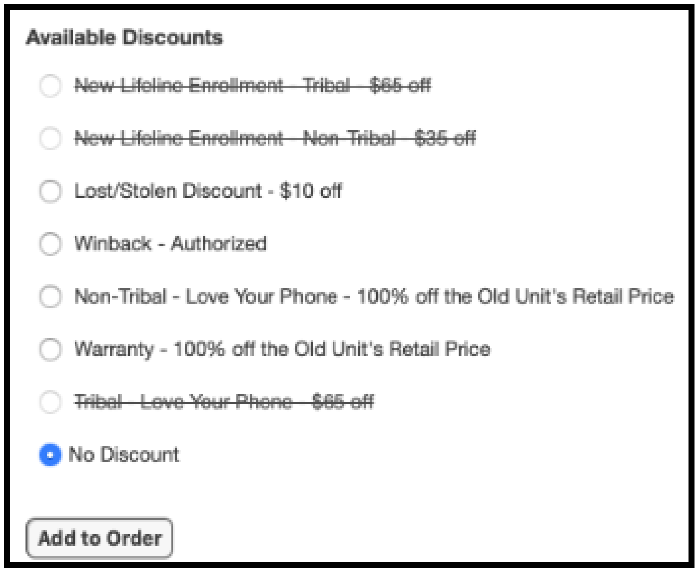
3. Select the Warehouse as Assist Wireless for Field Agents or the store number if a store is calling in.



4. Click on Manually enter a Serial Number or Barcode and enter in the ESN

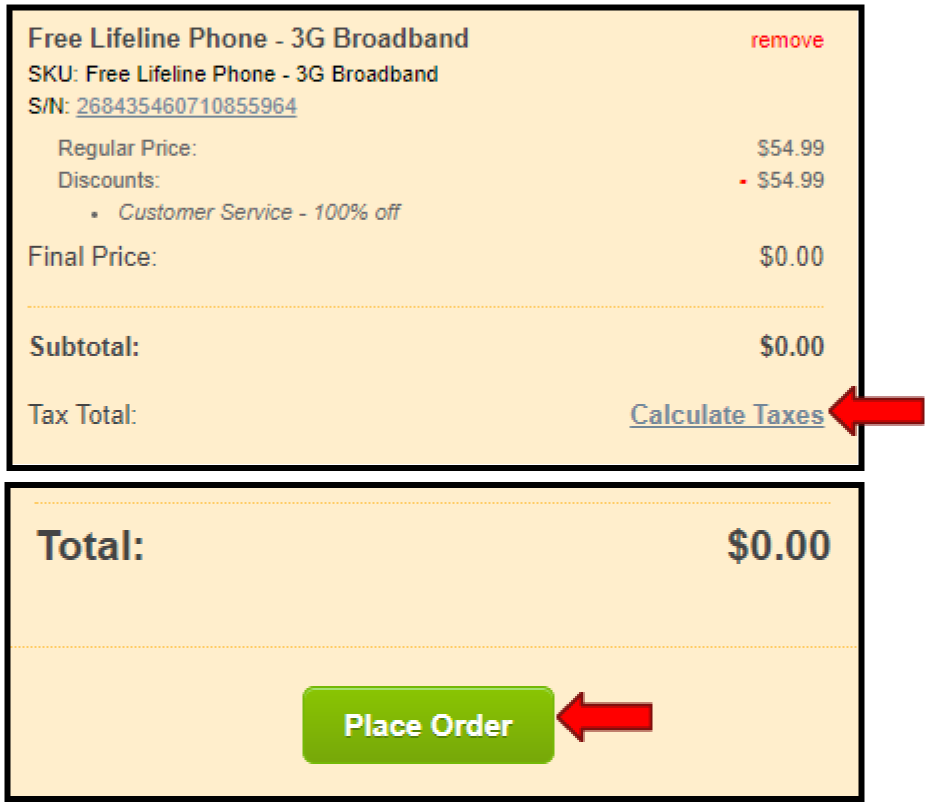


5. When the inventory information has populated choose the appropriate discount to apply and click "Add to Order".



6. You will be prompted to select the Swap Reason Code. Select the reason for the swap and click Submit.

7. In the Order Summary, click on calculate taxes, enter the payment information if applicable and place the order. The system will complete the swap for you.



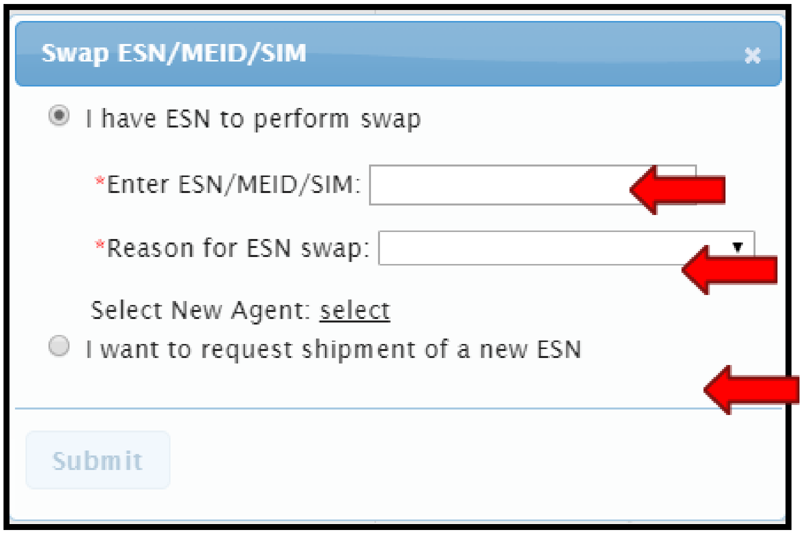
Manually Swapping without Buy Inventory

In some cases we will need to perform manual inventory swaps due to issues with selling the device through Buy Inventory, etc. Before you can manually swap the device you will need to bill the account for the device. See To manually bill an account:

1. Log in to Fusion and search for the customer's profile by entering the phone number or account number into the "Search Customers" field.

2. Click "Swap ESN/MEID"

3. Enter the new ESN number, Reason for ESN swap, select the new agent and click "Submit"



- The swap reason codes determine what the inventory status of the *old* device will be updated to - if you do not select the correct code, this causes issues for the sales, inventory and other teams. It is imperative that you select the correct code when processing these transactions for the agents. Below are the swap reason codes
    - Phone Returned
    - Phone Not Returned
    - Phone Warranty Exchange
- The new agent number determines which agent the *old* device will be updated to **- if you do not enter in the correct agent ID or do not enter in an agent ID at all, this causes issues for the sales, inventory and other teams. It is imperative that you enter the correct agent ID when processing these transactions to ensure the correct agent is held accountable for the device being returned/not returned.**

4. Add the account note that corresponds with the Swap reason code.

Swap - Lost/Stolen Replacement	Customer's phone has been lost/stolen.
Swap - Agent Error	Agent swapped phone on incorrect account. Agent # Rep Name:
Swap - LYP	Customer is exchanging their working device for a new phone.
Swap - Phone Upgrade (Returned)	Customer is returning their current working device and upgrading to a new device.
Swap - Phone Upgrade (not returned)	Customer is upgrading their device and keeping their previous device.

*Note - If you are changing from a CDMA device to a GSM device, you will need to swap the SIM first and then attach the IMEI onto the account.

Replacement SIMs, Devices & Parts

If the customer is no longer covered under warranty, they can purchase a replacement phone for $35 with a Credit Card through our Customer Service Team. Once the payment has been processed, the request must be submitted via the [Shipment Requests JotForm](#).

- If the customer is unable or unwilling to pay for the replacement phone, you can transfer the customer to the Retention Department to see if they qualify for a discount on the replacement device - 844-529-9370
- All replacement parts (batteries, chargers, SIMs, etc.) must be requested through the same shipment Requests Jotform.

Updating Customer Affirmation Date for Dropships

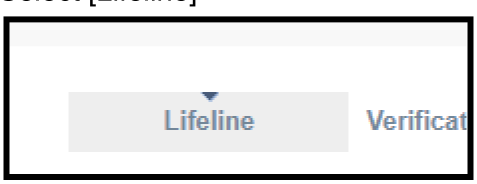
Effective Immediately, when submitting shipment requests for replacement SIMs and/or devices, we need to inform the customer that we need them to affirm that they would like to continue service with the company so that we can reset their usage date to prevent their account from being disconnected for non-use. You may use the script below for this process

> ***“Before submitting your shipment request, can you please affirm that you would like to continue service with (Company Name) in order for us to reset your non-usage date to today’s date to prevent your account from being disconnected for non use while you wait to receive your device and/or sim.“***

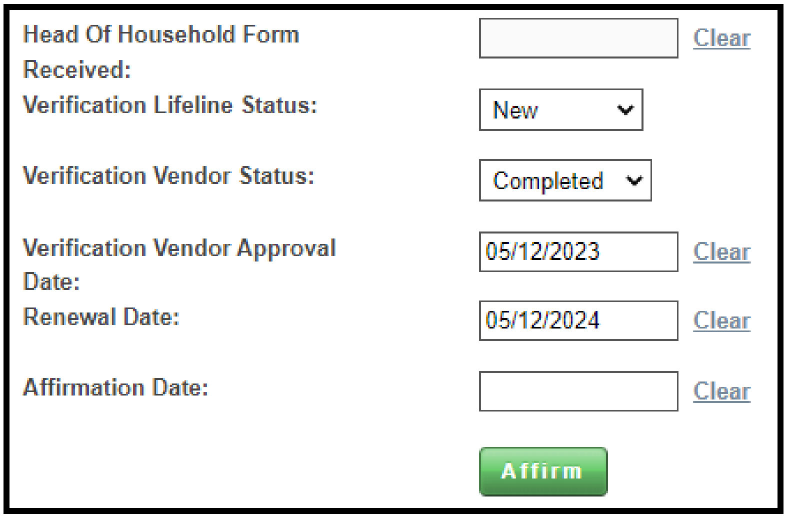
How to set the affirmation date

In Fusion

1. Pull up the customer’s account
2. Click [Edit Account]
3. Select [Lifeline]



4. Scroll down to the [Affirmation Date]
5. Click [Affirm] to set the affirmation date to today



6. Select [Update Customer]

Shipment Request Jotform

All shipment requests must be submitted via the [Customer Shipping Requests]() Jotform. Please include the following information.

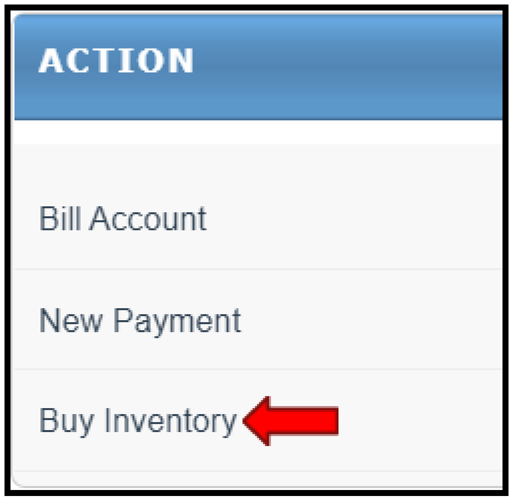
- Company
- Requesting Department
- Account Number
- Customer Name
- Shipping Address
- What's Being Shipped
    - Carrier
    - Device Make & Model (if applicable)
    - Should ESN or SIM be live when shipped? (Customer will be unable to use their current device, if yes.)
        - PLEASE ensure that the customer is aware if they want their device/sim active, they will have an interruption of service

Processing a Tablet Swap

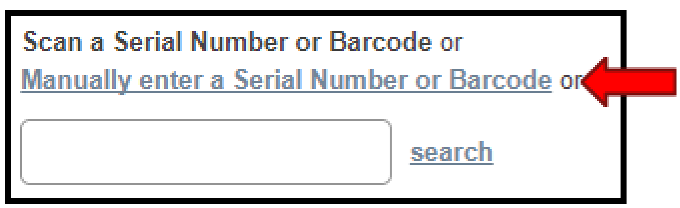
If the customer qualifies for a warranty swap, the swap must be processed on the customer's SECOND (EBB) account.

1. Open the customer’s Fusion EBB (child) account

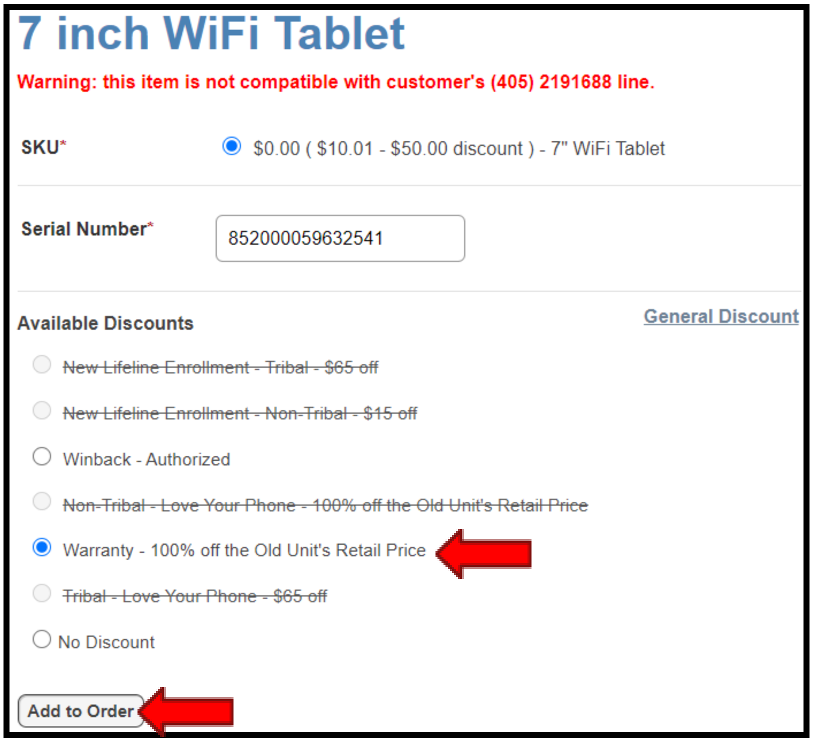
2. Click “Buy Inventory” on the customer's Overview page.



3. On the Buy Inventory page, click on [Manually enter a Serial Number or Barcode]. Then, scan the inventory that is being sold to the customer account and the information pertaining to the inventory will populate.
    a. If scanning does not populate the inventory, you can manually enter the inventory information.

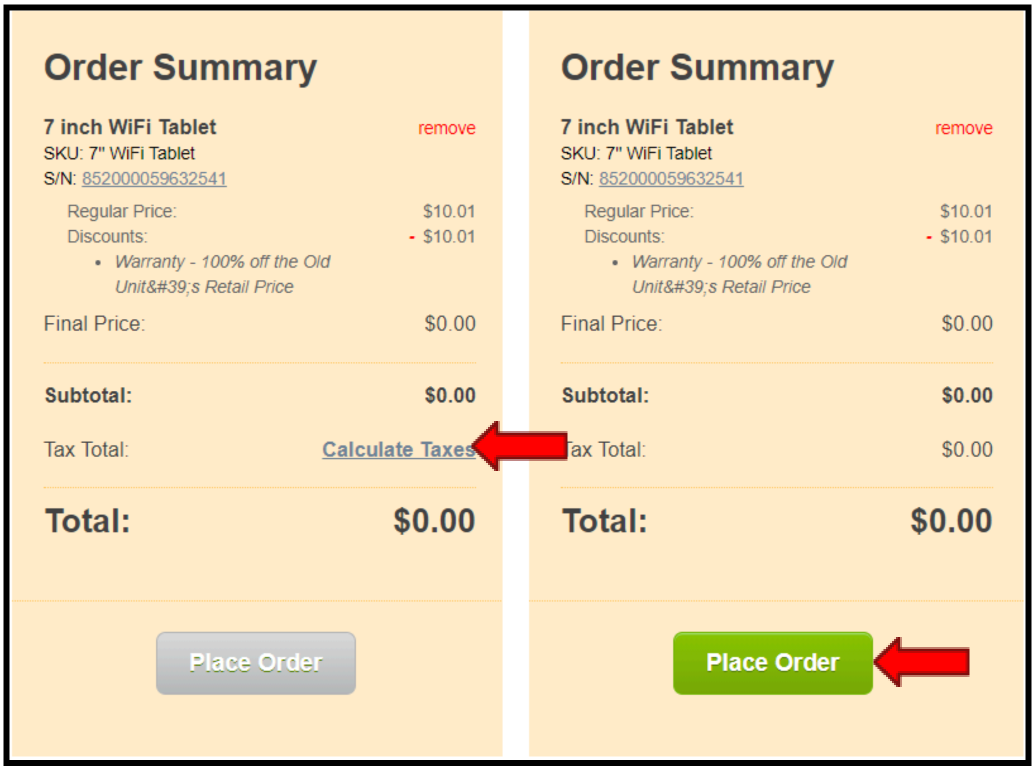


4. When the inventory information has populated choose the [Warranty - 100% of the Old Unit’s Retail Price] and click “Add to Order”.

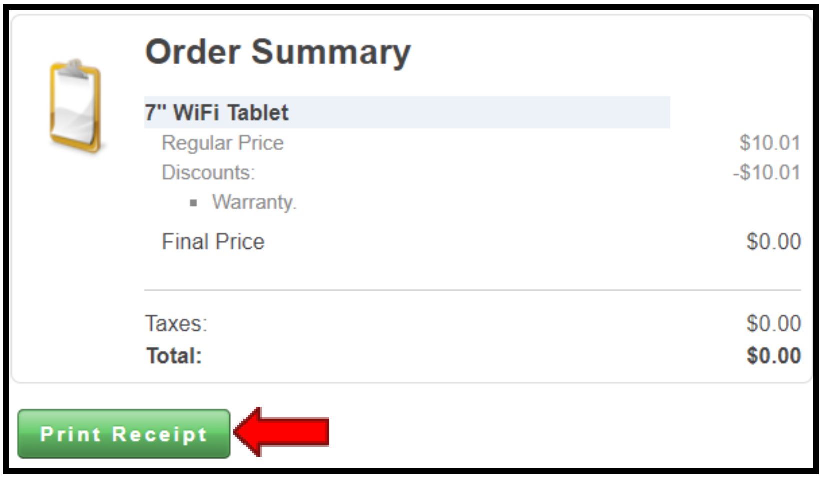


5. You will be prompted to select the *Swap Reason Code* (these are predetermined by the discount type, if any, applied to the inventory) - see Updated Discounts and Swap Reason Codes. Select the reason for the swap and click *Submit*.

6. In the *Order Summary*, click on *calculate taxes*. Once taxes are calculated, you will be able to click *Place Order*. The system will complete the swap for you.



7. You can view the *Order Summary* and print the receipt.



Lost, Stolen or Broken Tablets

- Lost, Stolen or Broken devices ***DO NOT*** qualify for warranty swaps, retention discounts, Guard Assure discounts or LYP swaps.
- Qualifying customers may only receive ONE device during the lifetime of the EBB program.
- If a customer's tablet is out of warranty or does not qualify for a warranty swap, we can advise them to purchase their own device ***(NOT FROM Assist Wireless)*** with wi-fi capabilities or compatible with the T-Mobile network.

Prior Assist Phone Swaps

SIM cards are a one time use but customers can re use devices that were previously on their account. To do so, the device will need to be made available and then sold/swapped to their current active account.

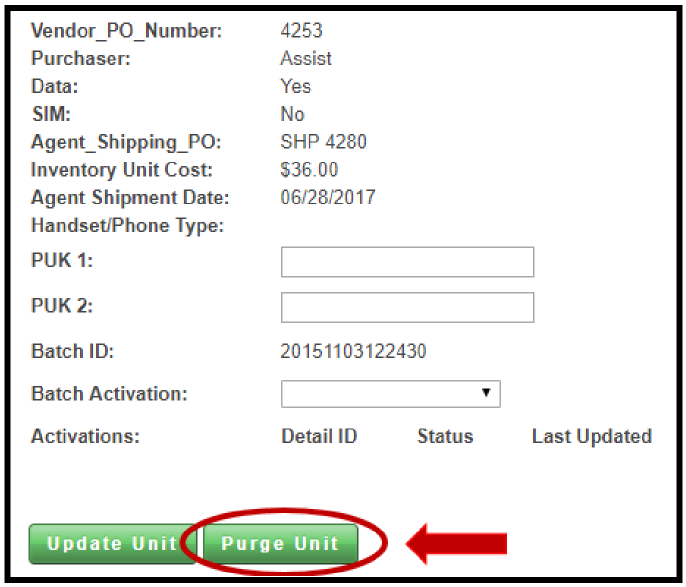
Important Notes:

- Device to be used CANNOT be currently sold to an active account

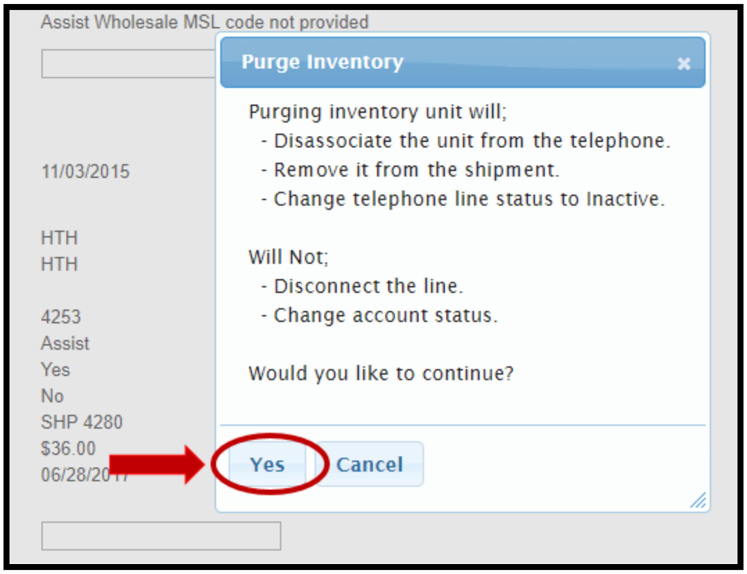
To make the device available

1. Search IMEI in Inventory tabs of Fusion to verify the IMEI is not sold and attached to an Active account.
   a. *If the device is the main device on an active account, we will not make it available for the agent.*

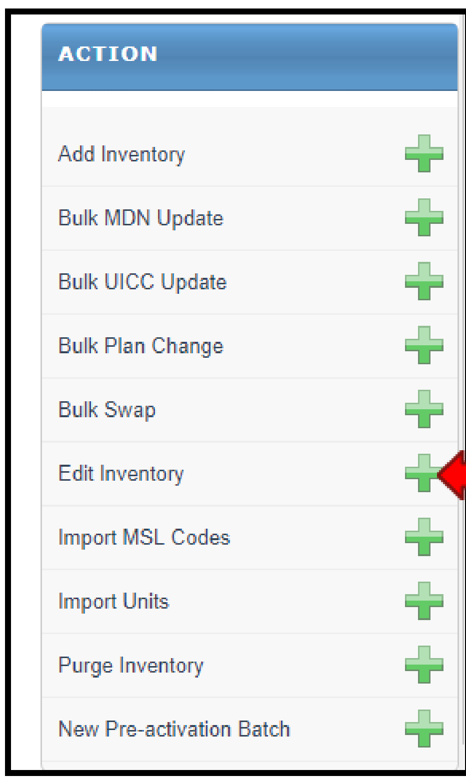
2. Purge IMEI on the Fusion Inventory tab.



3. Select “Yes” on pop-up screen

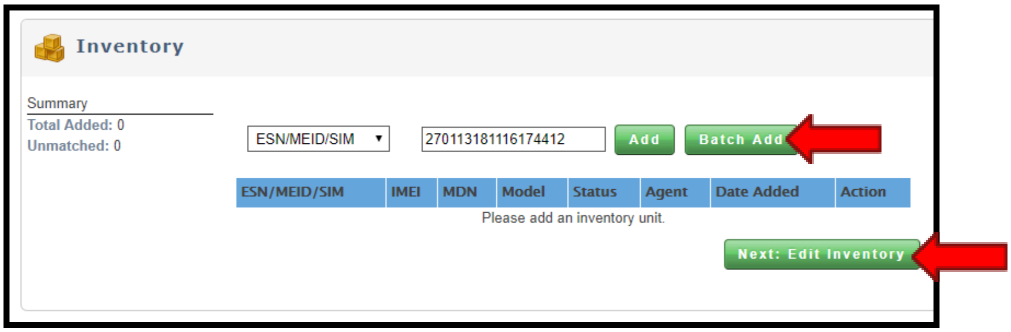


4. Select Edit Inventory from the Action column

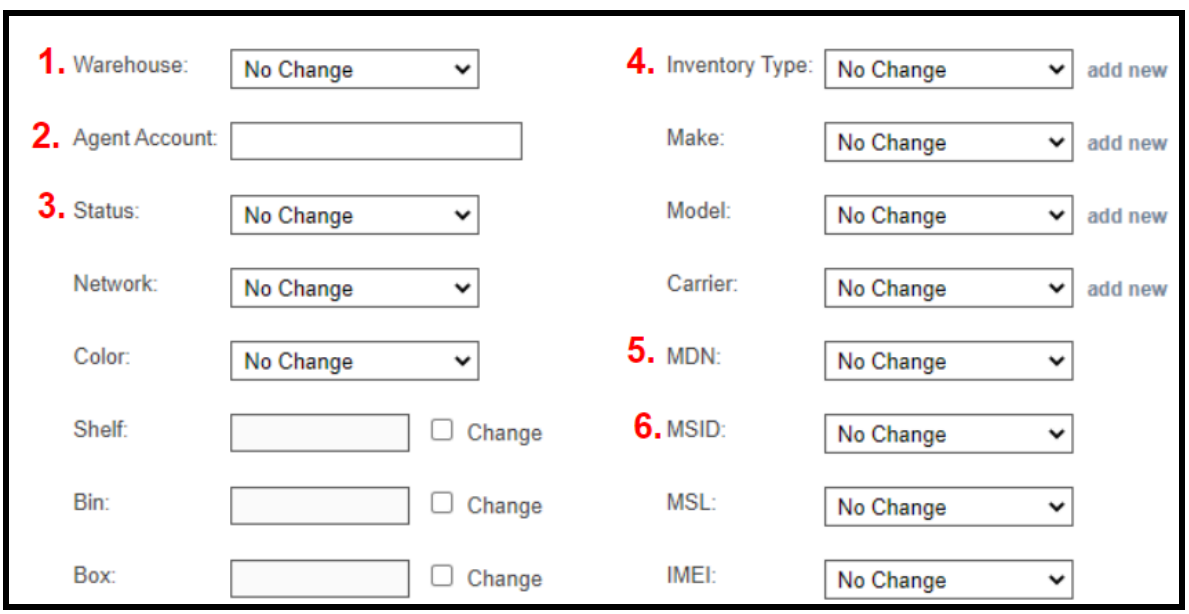


5. Copy and paste into the “IMEI” search box.

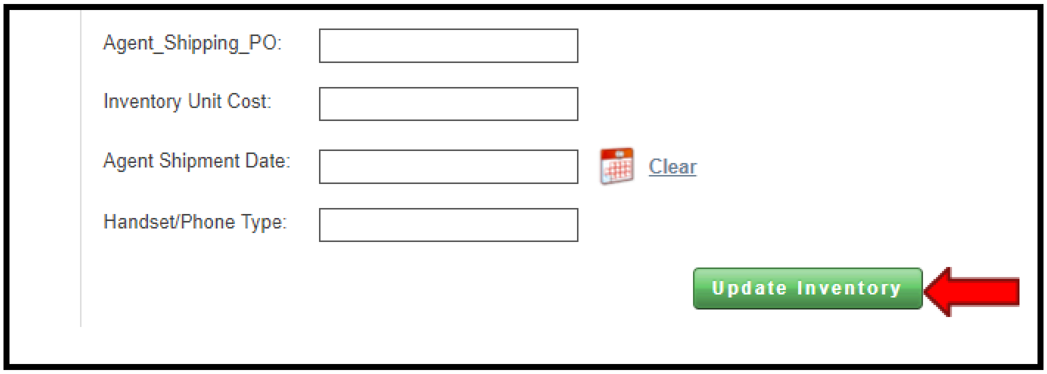
6. Click "Add"
    a. Note - for multiple units, follow steps 1-5 and then click [Batch Add] to enter in all unit IDs
7. Click "Next: Edit Inventory"



8. Select Correct Warehouse
9. Agent Account
10. Change Status to "Available"
11. Change the inventory type to "Prior Assist Phone - IMEI"
12. Clear MDN
13. Clear MSID



14. Select Update Inventory (Inventory is now available in Fusion and can be verified by selecting Unit Browser or the Inventory Tab and searching the device.)



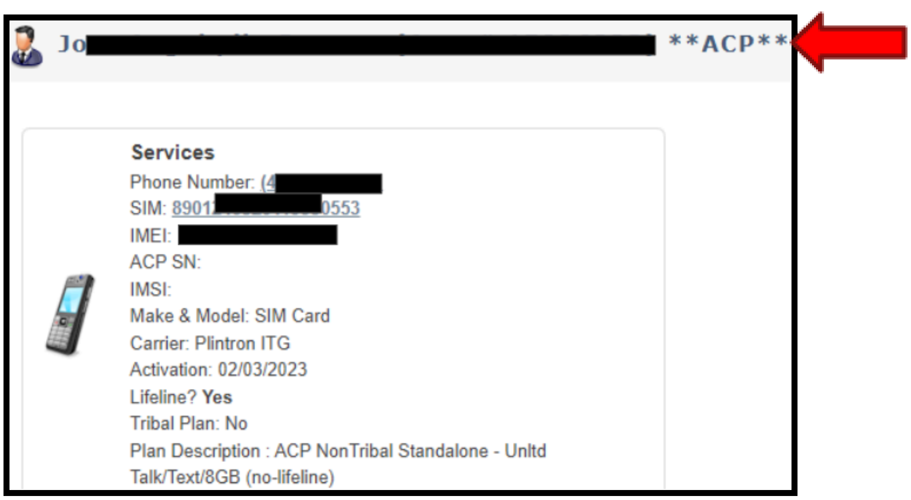
ACP Tablet Warranty Swaps

Before Completing the swap verify the following:

- Customer is still within the 30 day warranty period
- Issue with the current tablet is covered under warranty
- Verify that there currently is a Tablet on the customer's ACP account
    - See procedures below
- The price of the current tablet matches the price of the new tablet to be given
    - If the price of the new tablet is greater, inform the agent/customer they will have to make a payment or use a tablet of the same value.

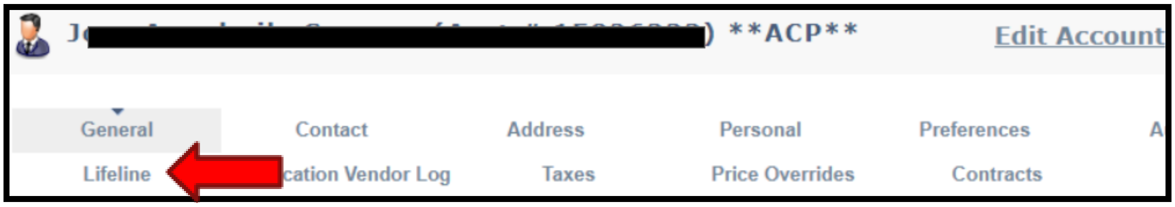
How to determine if the customer has a tablet

1. Open the customers ACP account in Fusion

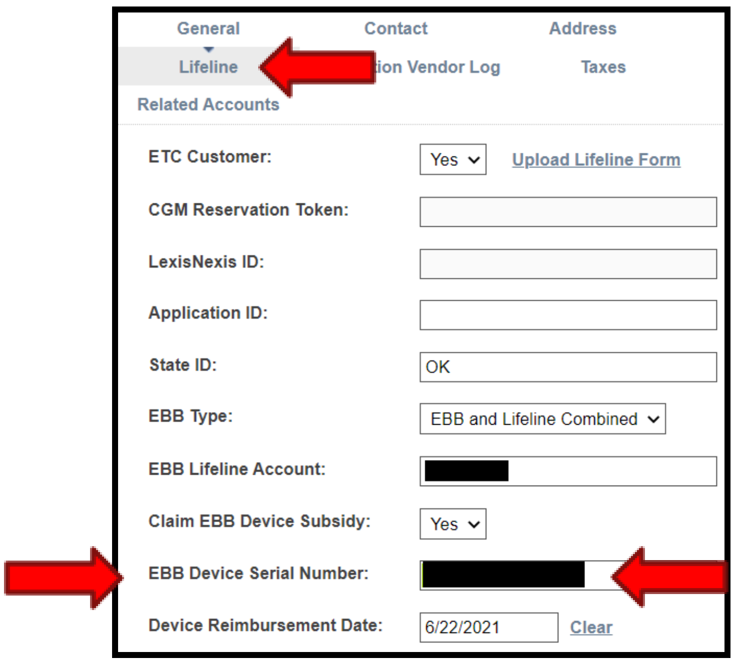


2. Select [Edit Account]

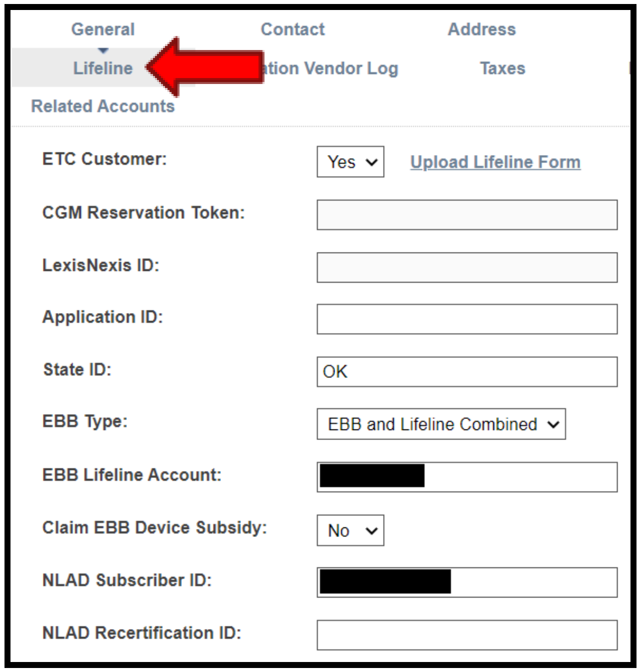
3. Select [Lifeline]



a. If the customer has a Tablet, it will be listed under [ACP Device Serial Number]



b. If the customer DOES NOT have a Tablet, the [ACP Device Serial Number] section will not be displayed.

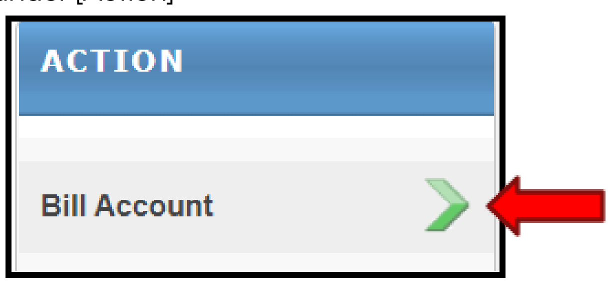


Process to perform the Tablet swap

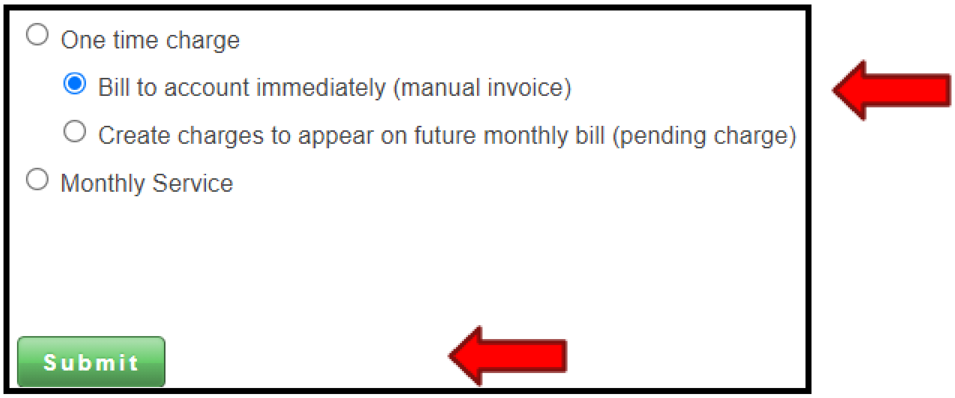
1. Open the customers ACP account in Fusion

2. Follow the above steps to ensure the customer currently has a tablet on their ACP account

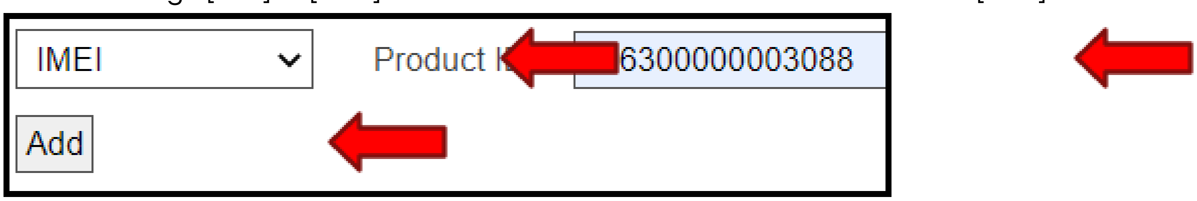
3. Select [Bill Account] under [Action]



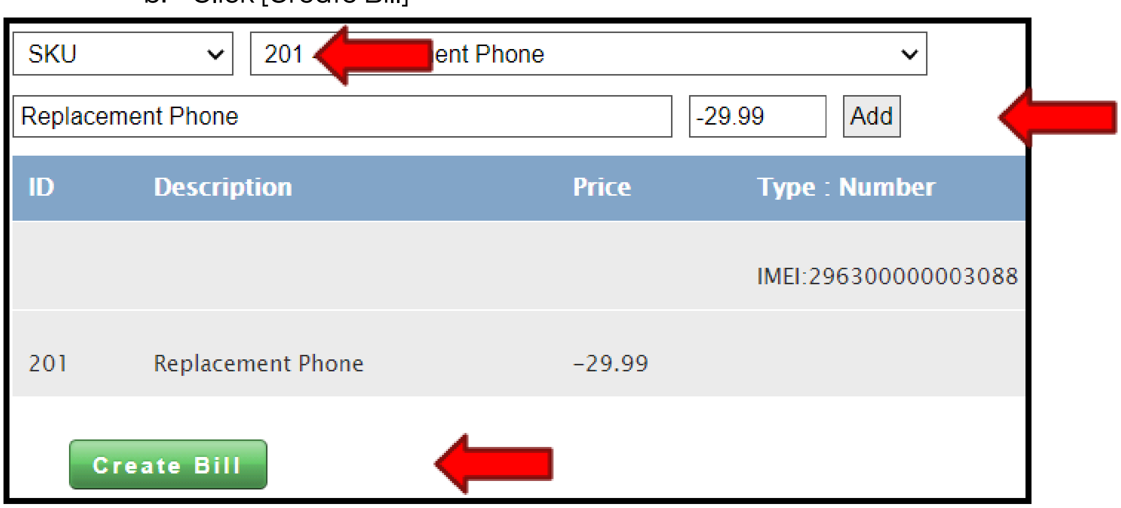
4. Select [Bill to account immediately (manual invoice)
5. Click [Submit]



6. Change [Sku] to [IMEI] and enter the IMEI of the new tablet and click [Add]

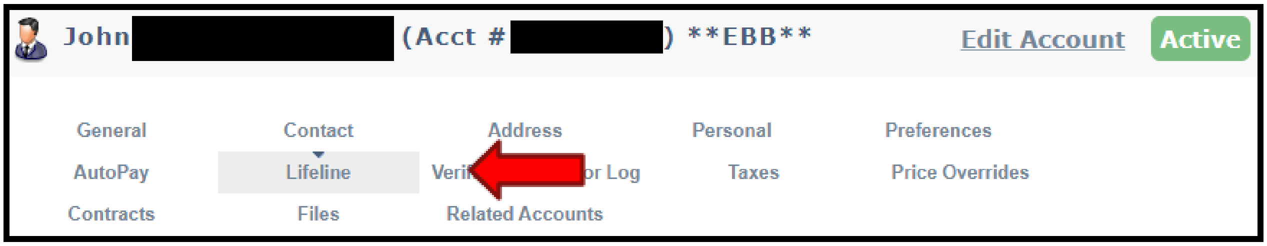


7. Change [IMEI] back to [SKU] and select SKU [201 - Replacement Phone]
    a. Change the price to the negative equivalent of the price of the tablet then click [Add] (example: if the new tablet to be given is $19.99, enter -$19.99)
        i. If the NEW tablet is MORE than the tablet currently on the account, enter the price of the tablet that is currently on the account. There will be a balance the customer will need to pay.
    b. Click [Create Bill]

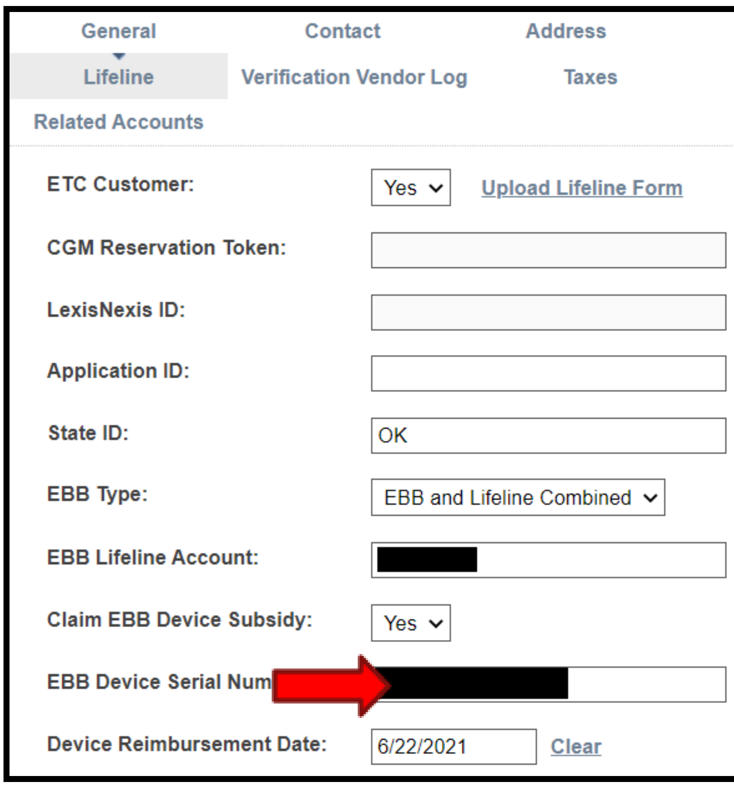


8. Once the bill is created, Select [Edit Account]

9. Select [Lifeline]



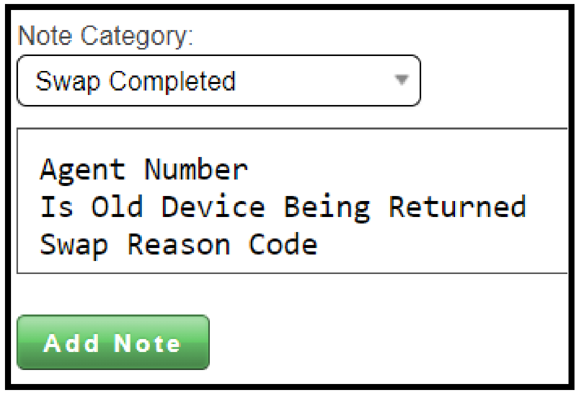
10. Update the [ACP Device Serial Number]



11. Click [Update Customer]

12. Once the swap is complete, Make sure to Purge the previous Tablet IMEI (tablet being returned) and change the status to [Review].

13. Note the ACP account with the warranty swap information



Guard Assure

Guard Assure (GA) is a device protection program that is offered by Assist Wireless to all active Lifeline customers. Customers have the choice of a monthly payment of $1.99 or an annual payment of $19.99. Guard Assure will provide up to a $65 discount towards any replacement device in store. If the customer is returning their current device, the deductible is $10 + taxes. If the customer is not returning their device, the deductible is $35 + taxes.

Agents are able to enroll customers in Guard Assure when they enroll for Lifeline services. Once the agent has successfully enrolled the customer in GA, the customer will receive a confirmation text.

The Guard Assure contract will NOT be created until the payment has been made for the first Guard Assure bill. Customers are unable to process any claims until the contract has been active for at least 60 days. 2 claims are allowed per 12 month period.

Account credits CANNOT be used towards Guard Assure deductibles- Agents must process the payment for the full amount of the Guard Assure Deductible.

<u>Pricing</u>

- Customers with standard devices and operator upgrades

- Monthly charge of $1.99
- Annual charge of $19.99

Important Notes

- Operator Upgrades and Promotional devices qualify for a $65 Guard Assure discount
  - Promotional devices are subject to a replacement fee
- BYOD and Prior Assist devices are not eligible for Guard Assure
- Guard Assure discounts cannot be combined with any other discount (Winback, LYP, etc.)
- Guard Assure discounts are determined by the value of the current device on the customer's account
  - Example: customer with a $65 device will receive a $65 GA discount
  - Customer with a $50 device will receive a $50 GA discount
- Payments must be processed AT TIME OF CLAIM/SALE.
- ALL Guard Assure monthly invoices must be current at the time of claim.
- Customers must be enrolled in the Guard Assure program for at least 60 days before submitting their first claim.
- Only 2 claims are allowed per 12 month period

Processing A Claim

Guard Assure claims can only be processed in store or by field agents. If a customer wants to file a claim, they must visit a store or field representative.

There are 3 main parts to processing a Guard Assure claim

1. Verify that the customer is enrolled in Guard Assure
2. Verify that the customer qualifies for a claim
3. Process the Claim

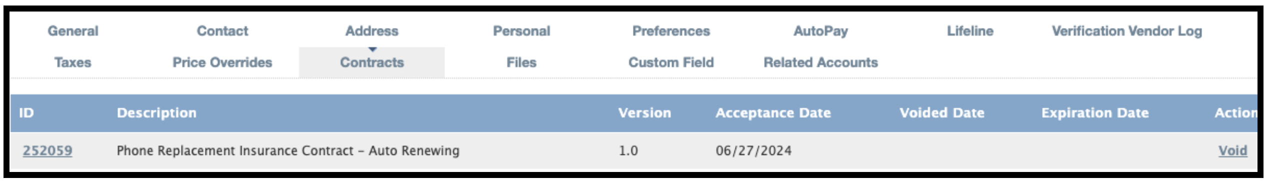
Verify that the customer is enrolled in Guard Assure

Opening Script

"Thank you for calling Assist Wireless Guard Assure, my name is (Your Name). How may I help you today?"

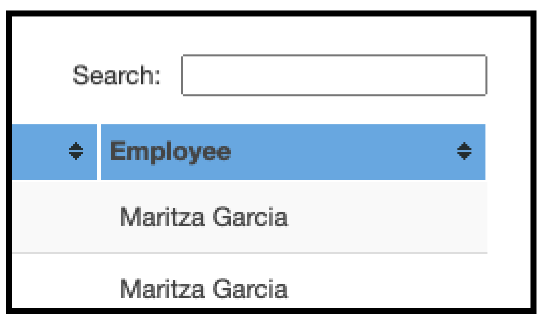
1. Pull up the customer's account in Fusion
2. Click on [Edit Account]
3. Click on [Contracts]

4. Verify that the Guard Assure contract exists and the acceptance date is at least 60 days prior to today's date
    a. If the contract is missing but the customer has GA Bills, Please open a ticket with the Tier2 Team
    b. If the contract has not been active for at least 60 days. The customer will not be able to complete a GA claim.
    c. If a [Voided Date] exists, the customer will be unable to process a claim as that indicates they have terminate the GA contract.
        i. Contracts do not expire even when an expiration date is present. As long as the customers make their continued payment for GA, they will be remain in the program.



Verify that the customer qualifies for a claim

1. Verify there are No past due balances
    a. If a customer has a past due balance, it must be paid before a claim can be processed. This includes all Guard Assure and monthly bills.
2. Verify that customer has **NOT** used both claims by checking the account notes and invoices
    a. You can use the search bar directly above the customer's notes to search for the specific note category such as “Guard Assure” or “Claim”.

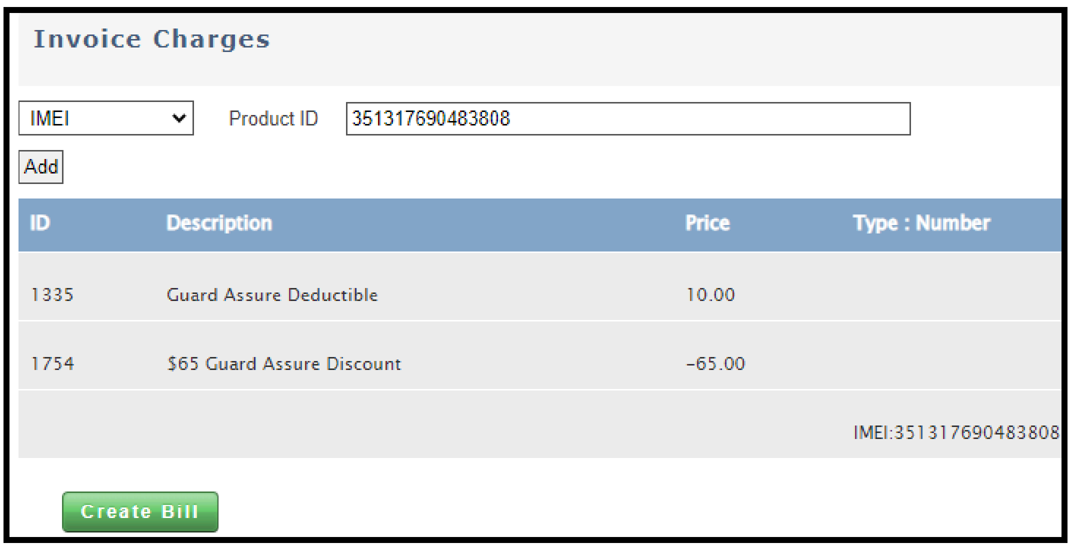


Creating the Deductible Bill & Processing the Claim

1. Make note of the price of the existing device on the customer’s account
2. From the [Action] menu, select [Bill Account]
3. Select [Bill to Account Immediately] then [Submit]
4. Add the SKU for the deductible

a. If customer is **returning** their current device, the deductible is $10 + taxes (SKU 1335)
b. If customer is not returning their device, the deductible is $35 + taxes (SKU 1336)
    i. If customer wants an upgraded device (any device $65+), they must pay the deductible and the remaining amount for the upgraded device

5. Add SKU for Guard Assure Discount - the discount amount depends on the value of the CURRENT DEVICE on the account
    a. 1754 [$65 Guard Assure Discount]
    b. 1809 [$50 Guard Assure Discount]
    c. 1583 [$40 Guard Assure Discount]
    d. 2293 [$45 Guard Assure Discount]
    e. 1582 [$35 Guard Assure Discount]
    f. 1584 [$10 Guard Assure Discount]
6. Change [SKU] to [IMEI] and enter the new IMEI (get this from the agent) and add to the invoice
    a. (there should be three line items on the bill, before processing the payment, verify that you have parts A, B and C on the invoice)



7. Let the agent know the total amount of the deductible bill so they can post the payment. (the total is what shows on the invoice you created. Customers **CANNOT** use account credit towards their claim).
8. Once you verify the payment has been posted successfully, Process the IMEI swap
    a. Check the [Payments] tab in fusion to make sure the payment was posted and verify that the invoice you created is in [Paid] status.
        i. Payment

ID	Status	Type	Transaction	Created	Amount	Credit	Posted By
5929327	Non-Void	Other - Internal Use Only	06/27/2024	06/27/2024	12.12	0.00	Maritza Garcia

ii. Bill

ID	Status	Created	Due Date	Taxes	Total	Balance	Employee	Type
49473728	Paid	06/27/2024	07/12/2024	2.12	12.12	0.00	Maritza Garcia	Invoice

9. Provide the agent with the claim# which is the Invoice ID number of the bill you created

ID	Status	Created	Due Date	Taxes	Total	Balance	Employee	Type
49473728	Paid	06/27/2024	07/12/2024	2.12	12.12	0.00	Maritza Garcia	Invoice

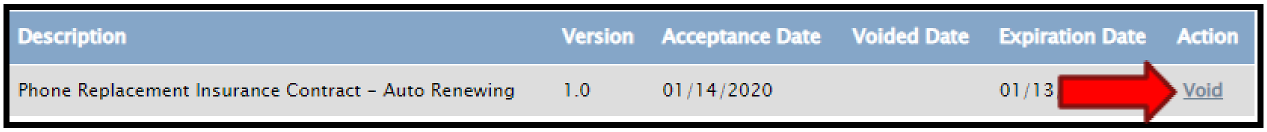
10. Add the corresponding canned note to account
    a. First Claim
        i. Guard Assure Claim 1 Created - “Created invoice for Guard Assure Claim # (insert invoice ID)”
        ii. Guard Assure Claim 1 Processed Claim 1 Processed - customer has 1 claim remaining.
    b. Second Claim
        i. Guard Assure Claim 2 Created - “Created invoice for Guard Assure Claim # (insert Invoice ID)”
        ii. Claim 2 Processed - customer cannot process another claim for the remainder of the 12 month contract.

To Remove Guard Assure

Customers can choose to remove Guard Assure from their account as long as they have not submitted any claims.

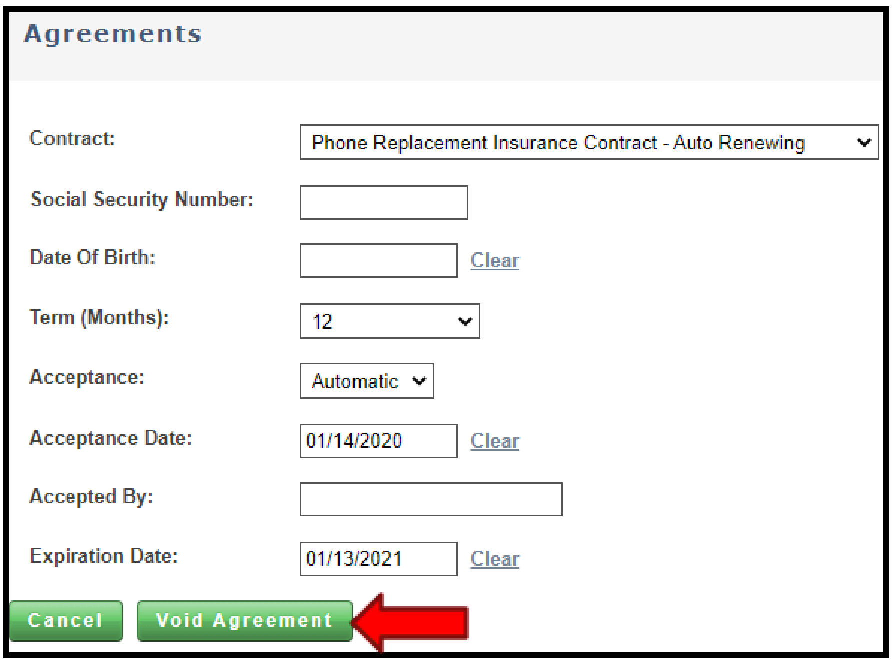
1. Pull up the customer’s account in Fusion
2. Verify that the customer has not made any claims
3. Click [Edit Account]
4. Select [Contracts]

5. Select [Void]



Description	Version	Acceptance Date	Voided Date	Expiration Date	Action
Phone Replacement Insurance Contract – Auto Renewing	1.0	01/14/2020		01/13	Void

6. On the following screen, select [Void Agreement



7. Ensure to leave a note on the account stating the Guard Assure Contract has been voided

Device Troubleshooting

Below you will find procedures for troubleshooting phones & tablets when customers are unable to use their talk, text or data services as well as steps for setting up Wifi and internet services.

For detailed device troubleshooting please see Device Troubleshooting Guide * This guide includes the following:

- **APN Settings**

- **Device Cannot Make or Receive Calls**
- **Device Cannot Send or Receive Texts**
- **Data Issues**
- **No Service Issues - Dropped Calls (No Signal Bars - No Antenna)**
- **SIM Status for PWG**
- **Hard Resets + Programming Codes**

****IMPORTANT** Non Compatible TMO VoLTE Devices**

T-Mobile is blacklisting various makes/models particularly older models or BYOD devices that are not VoLTE compatible. Customers might begin calling stating their service has stopped working.

1. Try all of the basic troubleshooting and ensure the service is still active in Fusion and MVNO
2. If possible, try the SIM card in a different device to verify the issue is with the device and not the SIM
3. Check the IMEI 's compatibility in the T-Mobile BYOD Tool
    a. If the device is compatible with TMO we can attempt to send a replacement SIM
        i. Verify that all system updates have been done on the device
    b. If the device is NOT compatible, we can run the customer through the retention calculator to determine if they qualify for a discount towards a replacement device.

Monthly Data / Plan Reload

Below you will find the process to verify if a customer's monthly plan has reloaded.

MVNO Connect / MVNO C

Link:
https://mvnoconnect.telgoo5.com/api/telgoo5/index.php?TwUm+NtXUKcPsFebTXxJYucsXxh8mohjh3FyijY5mRw=

Panda Mobile Agents ONLY
Username: paula
Password: &My@6EWi

All other enTouch Agents

Username: enTouch.Wireless
Password: COzevUw=3r$

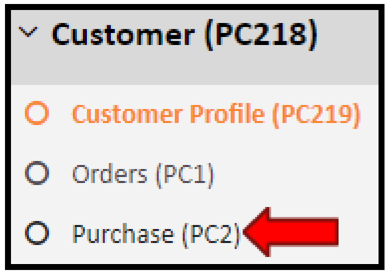
1. Log in to MVNO Connect MVNO using the appropriate Logins
2. Search the customer by phone number or sim number
3. To view the talk, text and data balances, click [Load Carrier Status] under [Line Information]
4. Once the [Line Information] is selected, you will see the Talk, Text and Data limits and usage.

Line Information

OCS LIVE STATUS	ACTIVE
PLANID	7016
PLAN NAME	Lifeline 1000T/500Text/100mb
ACTIVATION DATE	09-15-2023
Billing Code	81400011
PUK1	48878127
PUK2	10328969
MVNO	Pandaacp
Load Carrier Status	

LIMIT	1000 MINUTE
USED	1000 MINUTE
USAGE STATUS	BLOCKED
REMAINING	0 MINUTE
AUTO RENEW	Yes
TYPE 2	NC_SODRILD_B
LIMIT	50000 MESSAGE
USED	39 MESSAGE
USAGE STATUS	ACTIVE
REMAINING	49961 MESSAGE
AUTO RENEW	Yes
TYPE 3	NC_DO_B
LIMIT	100.00 MB
USED	100 MB

5. To view the monthly reload date and next reload, click [Purchase]



6. Here you bill be able to see all of the purchases including the monthly plan
    a. Activation is the day the plan loaded
    b. Next Renewal date is the next monthly reload date

PURCHASE ID	PLAN ID	PLAN	STATUS	ACTIVATION	EXPIRATION	NEXT RENEWAL	MINUTES	MESSAGE	DATA	PLAN TYPE
2251799813713764	7016	Lifeline 1000T/500Text/100mb	ACTIVE	10-18-2023 00:00:23	11-17-2023 23:59:59	11-17-2023 23:59:59	[illegible]	50000	100 MB	Service Plan

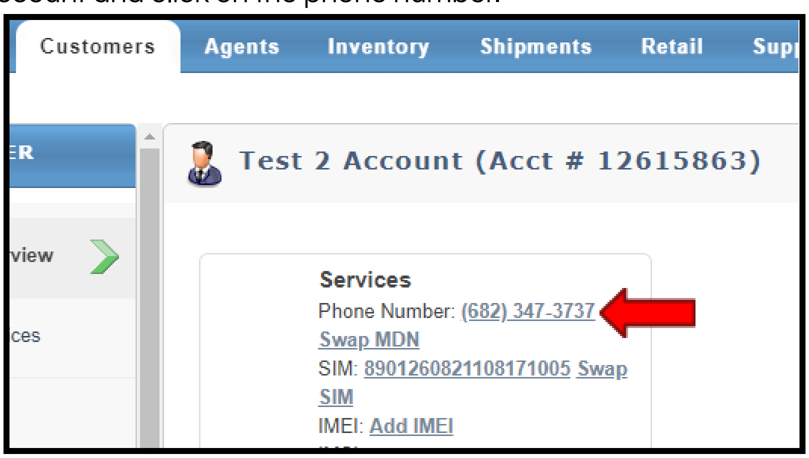
Syncing Account

Syncing an account is necessary when the device is having service issues such as calls and texting not working, data issues, etc.

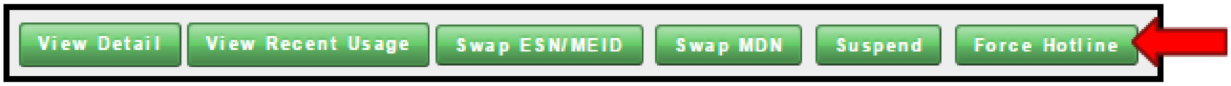
To Sync an account:

GSM (Plintron)

1. Access the account and click on the phone number.



2. Click on Force Hotline



3. Once the account is in Hotline Status, refresh the page to show the option for Remove Hotline
4. Click on Remove Hotline
5. 

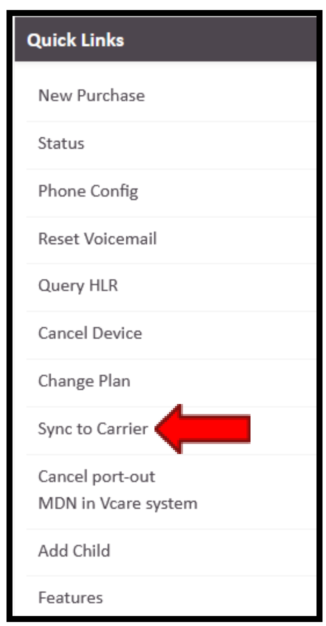
6. The account is now synced and should be active once again

GSM (PWG)

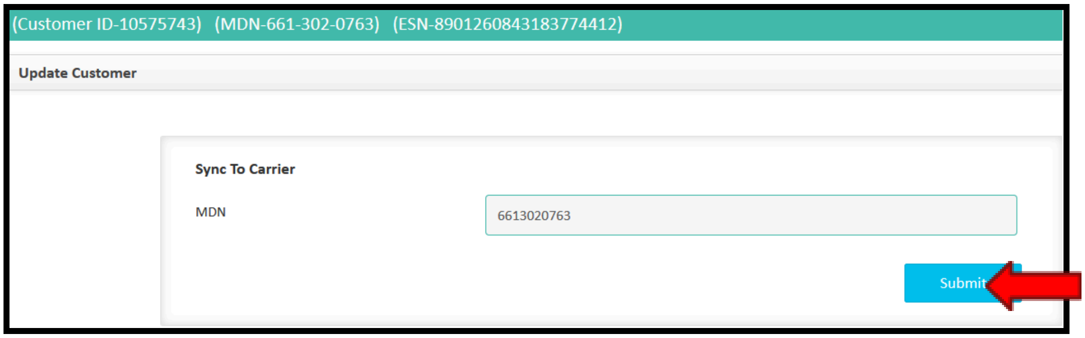
1. Log in to Fusion and search for the customer's profile by entering the phone number or account number into the "Search Customers" field to verify it is currently active

2. Log in to [PWG MVNO]() and pull up the customer's account by using the phone number or SIM number.
    a. **Assist Wireless**
        i. Username: AssistGSM
        ii. Password: ZJBT5MNSPNWDC3Y
    b. **enTouch Wireless**
        i. Username: Tier2Via1
        ii. Password: r¤maª!~§+n
    c. **Safetynet Wireless**
        i. Username: Safetynet
        ii. Password: 7CG8PXOIGWNUC1X

3. Under Quick Links, select "Sync to Carrier"



4. Verify the phone number and click 'Submit"



5. The account is now synced.

***For detailed device troubleshooting please see [Device Troubleshooting Guide](#) ***

Clearing Customer Information / Clear Orders

Agents will call/chat to have customer information cleared out of the Fusion and CGM systems for various reasons. In order for all information to be cleared, you must update the CGM orders as well as any Fusion accounts.

Most Common Scenarios

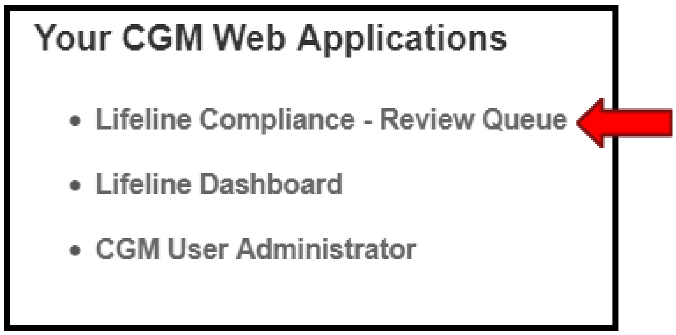
- **Clearing CGM/Fusion Order due to a system or carrier error**
    - This typically occurs if an agent is in the process of running a CGM order and a carrier/system outage occurs. The CGM and Fusion account (if applicable) will need to be cleared before the agent can re-do the enrollment to avoid a duplicate error message.
    - This includes Failed NLAD orders
- **Clearing Old CGM/Fusion orders for customers who are attempting to re-enroll for services but they are receiving a duplicate error message.**
    - You will need to verify the customer's account has been disconnected for at least a day.
    - This will require us to run the customer through the De-Enroll tool to ensure the customer has been de-enrolled from NLAD
- **Clearing an order due to a DLE Error - Lifeline Benefit Duplicate**
    - A DLE error occurs when CGM detects the customer is a lifeline benefit duplicate.
    - See [DLE Failures](#) for more information
- **Clearing an order due to a DMD Failure**

- For DMD Errors, we are unable to clear any information and the customer will need to contact Enrollment Support

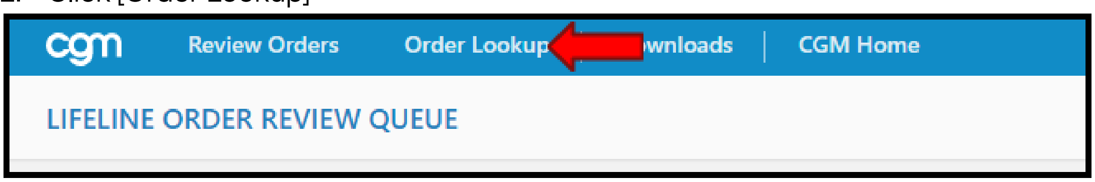
NOTE: Before clearing any information you must first determine the reason for the order failure to determine the appropriate process for clearing the customer information.

Determining the Reason for CGM Order Failure or Order Status:

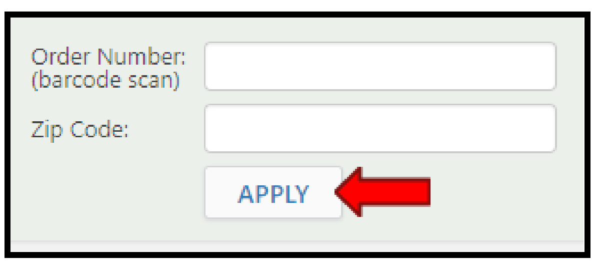
1. Log into CGM and click [Lifeline Compliance - Review Queue]



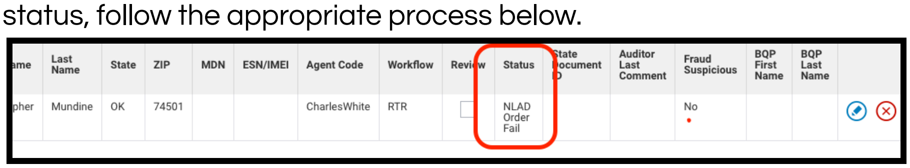
2. Click [Order Lookup]



3. Enter in the CGM order number or the name of the customer and click Apply



4. Locate the order ID and view the current Status of the order and based on the order status, follow the appropriate process below.



ew	Status	St D ID
	Order Incomplete	

NLAD Order Failed

Orders can fail NLAD for a variety of reasons such as NLAD being offline or a duplicate order. In most cases, when an order fails NLAD, there will be an account created in Fusion. If this is the case, the account in Fusion will need to be disconnected/cleared as well as the CGM order.

When no Fusion account is created, the account# in CGM will be listed as (99999999)

Account #	Vendor Order #	First Name	Last Name	State	ZIP	MDN	ESN/IMEI	Agent Code	Workflow	Review	Status
9999999999		Skyler	Burton	OK	73036			JoshuaStankewitz	RTR		NLAD Order Fail

IF an account is created, the Fusion account# will be listed

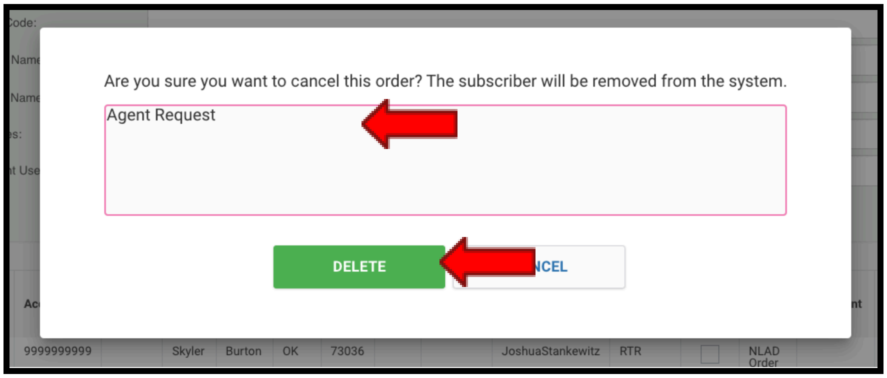
Account #	Vendor Order #	First Name	Last Name	State	ZIP	MDN	ESN/IMEI	Agent Code	Workflow	Review	Status
18077436	0	Tyler	Blankenship	OK	73045	4052102798	357564471758205	JustinLittle	RTR		NLAD Order Fail

If NO Fusion account is created:

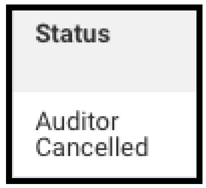
1. Click the Red (X) on the right

itor t nment	Fraud Suspicious	BQP First Name	BQP Last Name	
	No			

2. When the box appears, enter [agent request] in the comment box, then click [Delete]

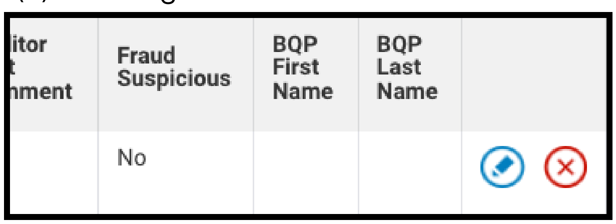


3. The status should update from [NLAD Order Fail] to [Auditor Cancelled]

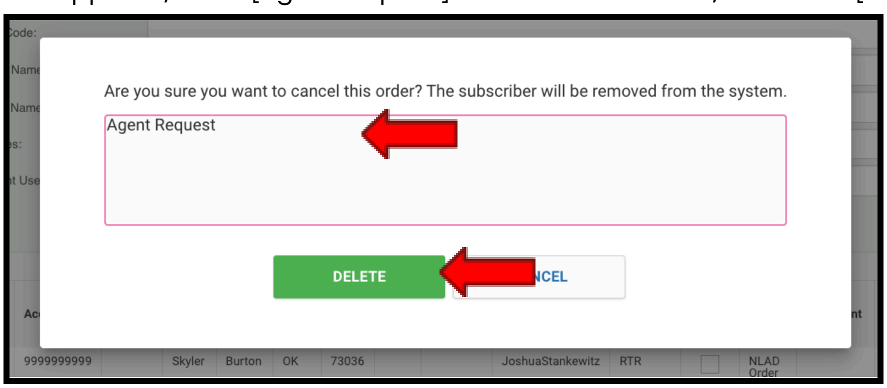


If a Fusion account is created:

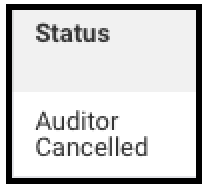
1. In CGM, Click the Red (X) on the right



2. When the box appears, enter [agent request] in the comment box, then click [Delete]

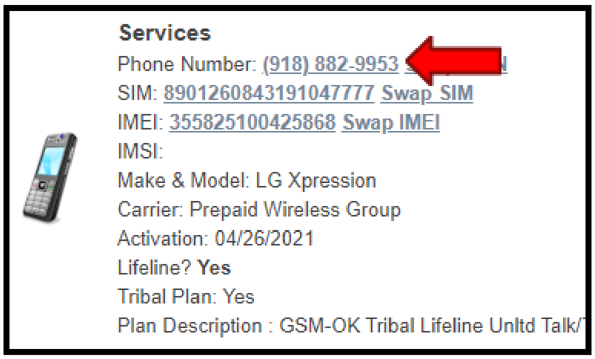


3. The status should update from [NLAD Order Fail] to [Auditor Cancelled]

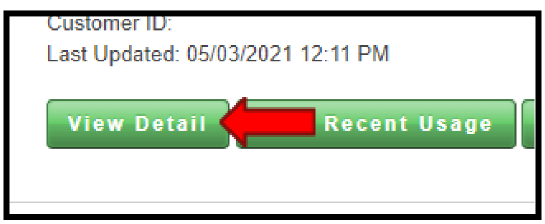


4. Go to Fusion and paste the account number in the search customers box

5. Click on the phone number
    a. In some instances, the Fusion account will already be in Final Bill status. If that is the case, the following steps are not needed.

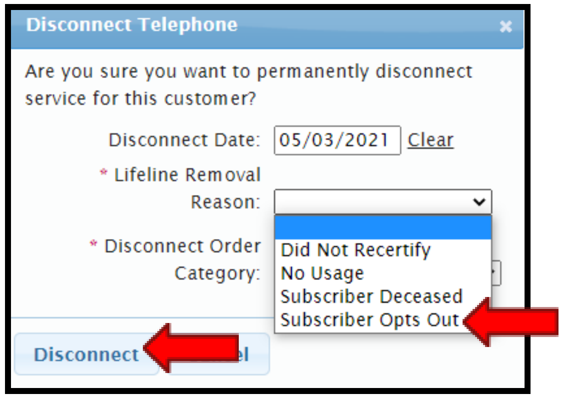


6. Click [View Detail]

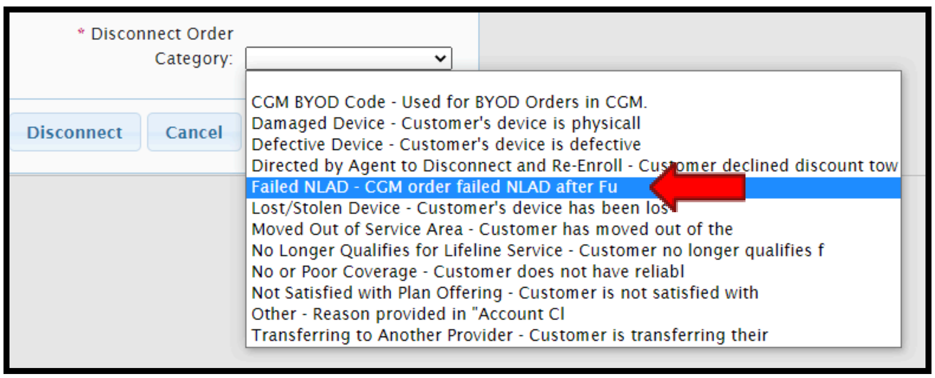


7. Click [Disconnect Account]

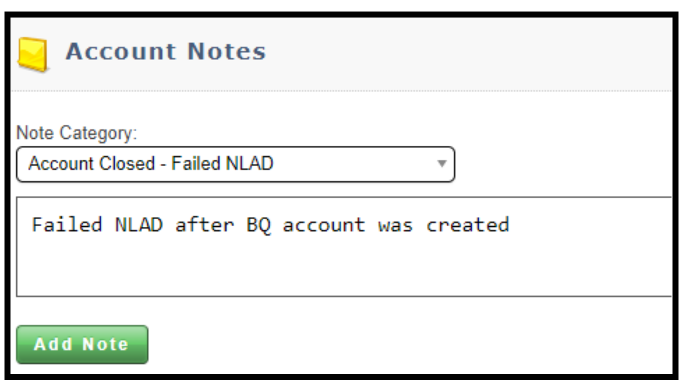
8. Select [Subscriber Opts Out] as the Lifeline Removal Reason



9. Select Failed NLAD as the Disconnect Order Category and click [Disconnect]



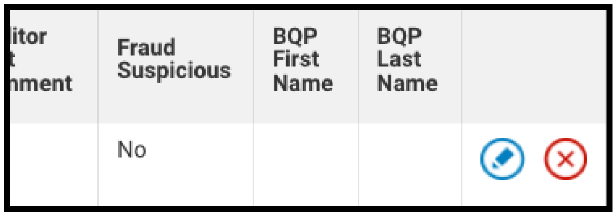
10. If the order is being cleared the SAME DAY it failed, purge the IMEI off the account and update the status to NLAD Order Fail. If the account failed on a different day, LEAVE DEVICE AS IS.
11. Add the Failed NLAD canned note to the account



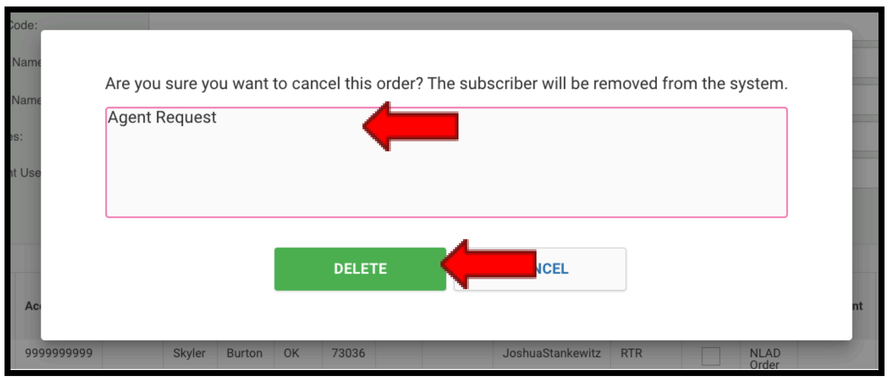
Order Incomplete

The Order Incomplete status occurs when the agent does not complete the order in CGM. Typically in this scenario, no Fusion account is created.

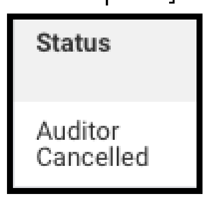
1. In CGM, verify that no Fusion account was created by checking that the account# is listed as [99999999]
2. Click the Red (X) on the right



3. When the box appears, enter [agent request] in the comment box, then click [Delete]



4. The status should update from [Order Incomplete] to [Auditor Cancelled]



Pending NaV Application

Orders in Pending NaV Application status are waiting on the agent to submit the NaV application for review. If agents request us to cancel orders in this status, they must be informed that since the order is on the Nation Verifier side of the process it may revert back to the same status even after we “clear" it. Advice them to contact NaV to ensure the order is cleared from their side as well.

1. Select the blue circle

Status	State Document ID	Auditor Last Comment	Fraud Suspicious	BQP First Name	BQP Last Name	
Pending NaV Application		Approved	No			

2. Change the status to [Denied Closed] and enter your initials as the [Auditor Last Comment]

Status	State Document ID	Auditor Last Comment
Denied - Closed		mg

3. Click the green check mark

4. The order will be updated from [Pending Nav Application] to [Denied-Closed]

Pending NaV Review

Orders go into Pending NaV Review once the NaV application has been completed and sent over to NaV for review. These orders CANNOT be cleared as they are currently in the National Verifier's review queue. The agent must contact NaV if they want the order cancelled/cleared or wait until it's approved or denied.

Lifeline Support/ NAV Phone: 800-234-9473

Hours of Operation
Monday - Sunday 8am-8pm CST

Review	Status	State Document ID	Auditor Last Comment
	Pending NaV Review		Approved

DLE Failure

A DLE error occurs when CGM detects the customer is a lifeline benefit duplicate.

When submitting a CGM order, the system checks 8 data points for duplicates including day of birth, year of birth, first & last name, address and zip code, etc. *Important Note: Even if the conflicting account information is **NOT** an exact match with the customer who is trying to enroll, there are enough data points to create a false positive, which, unfortunately we are not able to override.*DO NOT tell the agent that we will open a ticket and get the blocks removed because we are unable to do so. They can attempt to apply again in a few days but it is NOT guaranteed that the order will be successful.

BEFORE clearing the customer information you must first determine the conflicting account number that is causing the DLE Error (See How to find conflicting DLE Account)

Locating DLE conflicting Account

1. Look up the order number in CGM
2. Verify the order status is [DLE Fail]
3. Click the **+** sign on the left side of the order number to open the order history

	Order Date Time	Order #
+	4/18/2023 5:08:09 PM	44682376

4. Locate the comment showing [Lifeline benefit duplicate - CGM Order #########]
   a. If no order number is present, you will need to manually Download a DLE Report

Comment
order aborted - lifeline benefit duplicate
Lifeline benefit duplicate - CGM Order #42618395
Enrollment type: Combination Lifeline and ACP.
Started Order at: 4/18/2023 5:08:09 PM EST

5. Look up the CGM order number listed to get the Fusion account number to review

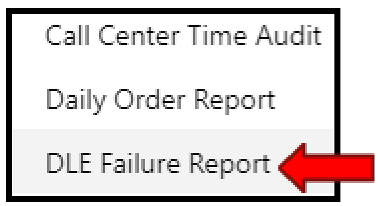
	Order Date Time	Order #	Lifeline NLAD Subscriber ID	EBB NLAD Subscriber ID	Account #
+	1/13/2023 4:00:24 PM	42618395	11CC817UR	1WFF5K	15707035

6. Pull up the Account# in Fusion
    a. If the Fusion/ACP account is [**Active**] and the information matches what is in CGM, advise the agent that the customer already has an active account with Assist/enTouch Wireless and they are not able to enroll for a new account.
    b. If the Fusion account is [**Active**] and the information does NOT match what is in CGM, but is similar, this is a false positive, advise the agent that we are not able to enroll the applicant for new service. Do not provide the agent with the account information that is blocking this customer.
    c. If the Fusion account is [**Inactive**] or [**Final Bill**], and it was not disconnected on the date they are requesting it to be cleared, Clear the CGM order that is tied to the Fusion account by changing the status to [Auditor Cancelled] and all other CGM orders that match this customer's information. Run the customer through the De-Enroll Tool located in the Agent Dashboard using the info from the most recent account. Advise the agent that you have cleared the information out of CGM and they should be able to enroll the customer.
        i. If the account was closed the same day they are asking for it to be cleared, inform the agent they must wait at least 24hrs before the customer can reapply/ be ran through the de-enroll tool.
    d. If the conflicting Fusion account was created prior to October 7th, 2013 and is [**Inactive**], run the customer through the De-Enroll tool using the customer's phone number, last name and state.
7. If the customer is still having issues enrolling after being cleared/de-enrolled, you will need to escalate the issue to the ops team. Ask the agent for a callback number where they can be contacted once we have a resolution.
    a. Open an Operations Ticket in Asana for review by the ops Team.

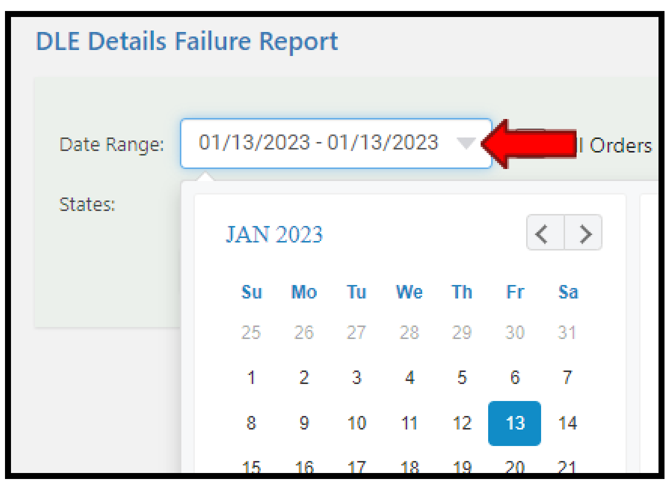
Downloading a DLE Report

1. Make note of the DLE failed order number, the date it failed and the customer's first and last name.
2. Log In to CGM
3. Select [Lifeline Dashboard]

4. Under Reports, select [DLE Failure Report]



5. Select the Date Range for which you need the report (Select the date the DLE failure was received)



6. Click [Run Report]

7. Locate the order number

4/18/2023 5:08:09 PM	44682376	DLE Fail	04/18/2023

8. Scroll to the right to find the [Account Number Match] which is the Fusion Account number and [CGM Order No Match]. Continue with step 6 from [Locating DLE conflicting Account](#)

Last Comment	Order Type	Customer	Account No Match	Vendor Order No Match	CGM Order No Match	BQP
order aborted - lifeline	In Person	AST	16133744	33744	44337754	

DMD Failure

Customers will receive this error in CGM when they have recently applied or attempted to apply for service with another lifeline provider. These customers will be unable to apply in person. Based on the order history we can determine how long the customer must wait before they can attempt to reapply.

See [Enrollment Support](#) for the full process.

First Name	Last Name	State	ZIP	MDN	ESN/IMEI	Agent Code	Workflow	Review	Status
Joseph	Bieker	OK	74129			IsmaelRendon	RTR		DMD Failure

Order Complete - Failed

Orders in Order Complete-Failed status do not need to be cleared as that status should not affect any future enrollments. We can change the order status to [Denied Closed] but it is not necessary.

1. Select the blue circle

Status	State Document ID	Auditor Last Comment	Fraud Suspicious	BQP First Name	BQP Last Name	
Order Complete - Failed			No			

2. Change the status to [Denied Closed] and enter your initials as the [Auditor Last Comment]

Status	State Document ID	Auditor Last Comment
Denied - Closed		mg

3. Click the green check mark

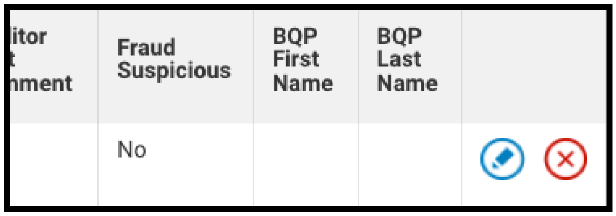
4. The order will be updated from [Order Completed - Failed] to [Denied-Closed]

Awaiting Proof

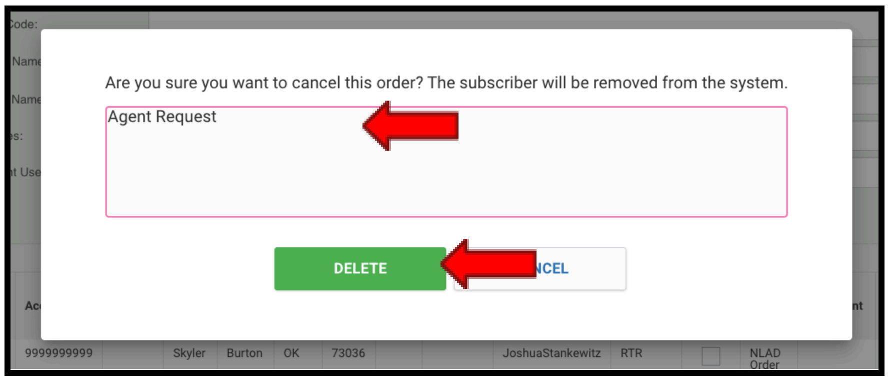
This status typically only applies to online self enrollment orders where we are waiting for the customer to provide requested proof before a decision is made on the order. If the customer wishes to have the order cleared we can do so however it could cause the customer to have an internal reservation. If this occurs the customer would need to wait at least 24-48 hours before attempting an in person order.

Agent Code	Workflow	Review	Status
astselfenroll	non - RTR		Awaiting Proof

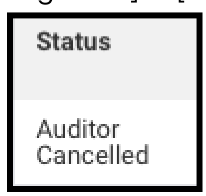
1. Click the Red (X) on the right



2. When the box appears, enter [agent request] in the comment box, then click [Delete]



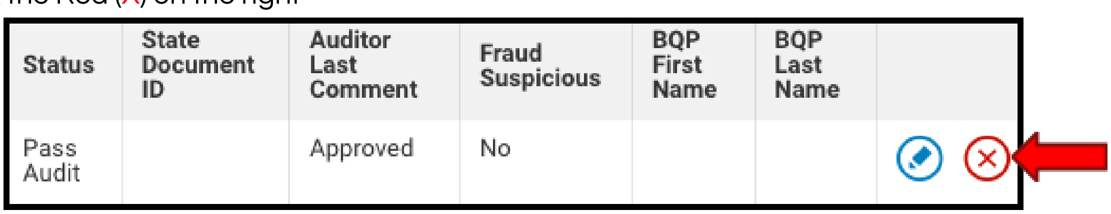
3. The status should update from [Awaiting Proof] to [Auditor Cancelled]



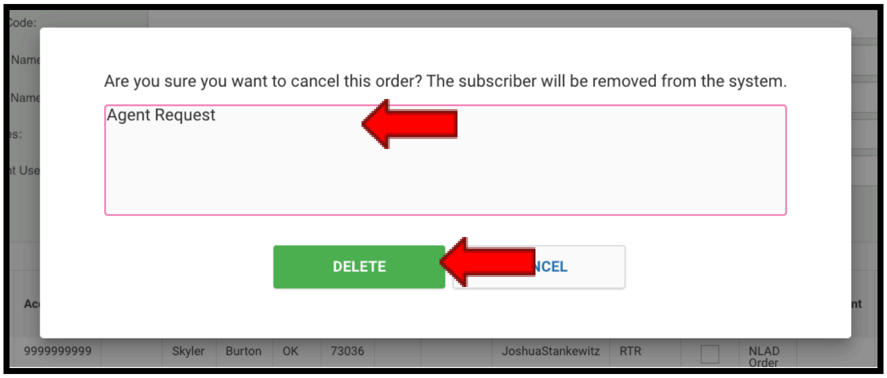
Pass Audit

Orders in Pass Audit status SHOULD NOT be cleared in CGM IF the Fusion account is still Active If the Fusion account has already been disconnected and it has been at least a day since the disconnect you can clear the order.

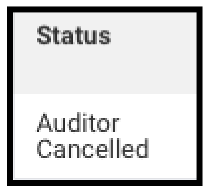
1. Click the Red (X) on the right



2. When the box appears, enter [agent request] in the comment box, then click [Delete]



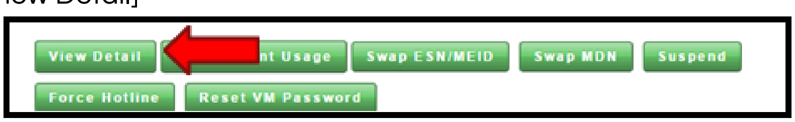
3. The status should update from [Pass Audit] to [Auditor Cancelled]



Clearing Accounts in Fusion:

Some orders that need to be cleared out of CGM will have created a Pending or Active account in Fusion. *Anytime you are requested to clear an order from CGM, you must check Fusion for an account.* Some of these accounts will need to be cleared out of the system, and the inventory will need to be made available to the agent for reuse (see Editing Inventory).

1. If a pending account was created for the customer, go to Fusion and look up the customer - if multiple accounts appear, select the account that says "Pending"
2. Click on the [Orders] menu
   a. If the New order status is Submitted, click on the order ID and click [Submit]
   b. If the New order status is Cancelled, go back to the Customer Overview page and follow steps 3-13
3. Click on the MDN
4. Click on [View Detail]



5. Change line status to [Inactive]
6. Update [Disconnection Date] field to today's date
7. Click [Update Services]

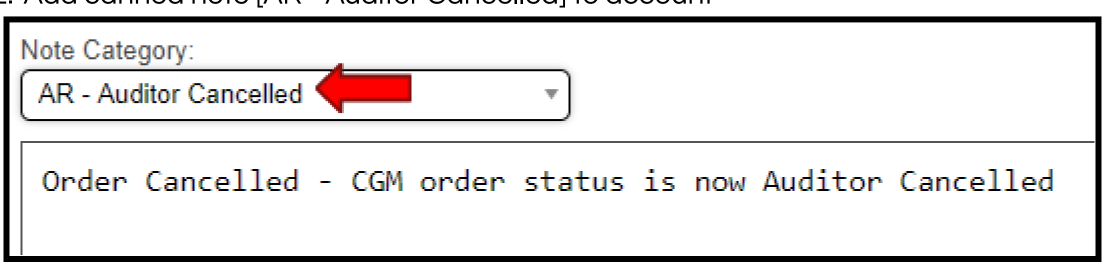
8. Click on [Edit Account]

9. Change account status to [Cancelled]

10. Click [Update Customer]

11. Go back to the customer's Overview page and confirm the status of the account was changed to Cancelled

12. Add canned note [AR - Auditor Cancelled] to account



13. Make inventory (ESN or SIM + IMEI) available to the agent (see Editing Inventory)

De-Enroll Tool on Agent Dashboard

The De-Enroll tool is a tool located on the Agent Dashboard that can be used to de-enroll customers who previously had an account disconnected and are receiving a DLE failure in CGM when attempting to re-enroll for service.

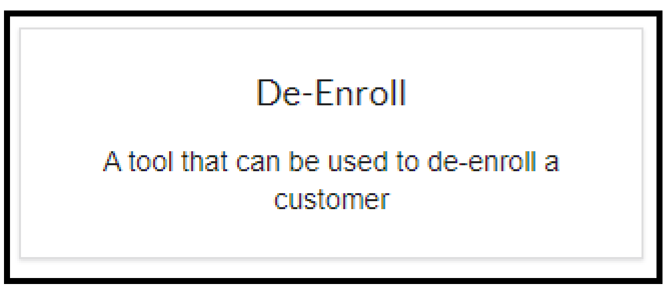
Important Notes:

- Customers with Active Lifeline accounts SHOULD NOT be ran through this tool
- Tool cannot be used to de-enroll customers with disconnects processed the same day
- CGM (Fusion PON) order number is required to de-enroll

Process

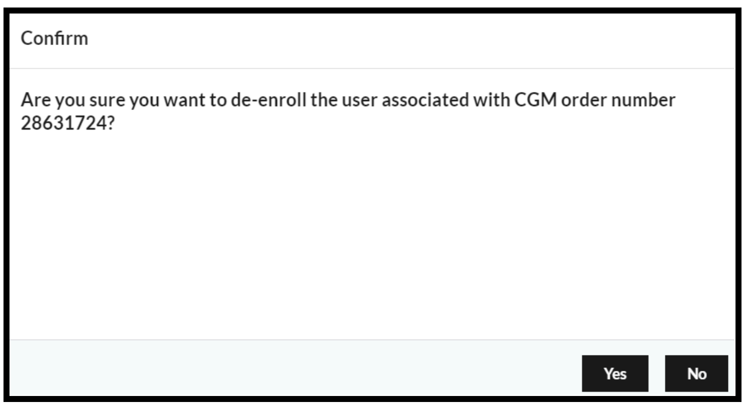
1. Log into the Agent Dashboard

2. Select the [De-Enroll] button

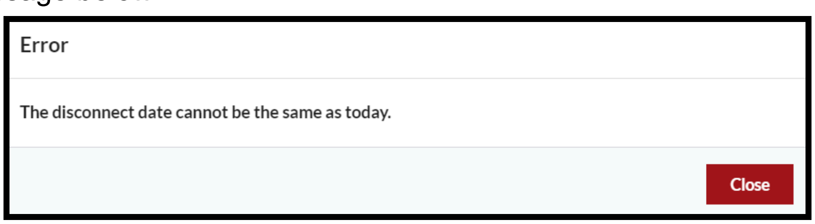


3. Enter the customers Fusion Account Number, Phone Number, CGM order number (PON number in fusion) and click submit

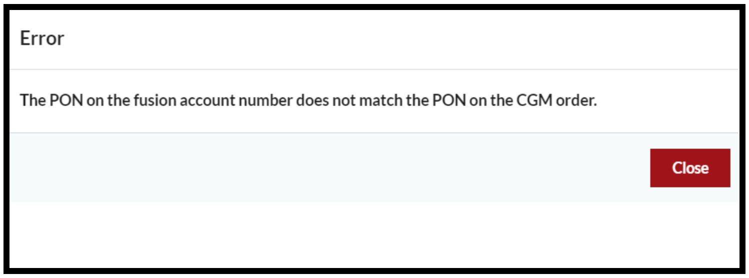
4. A confirmation box will appear, click Yes to continue



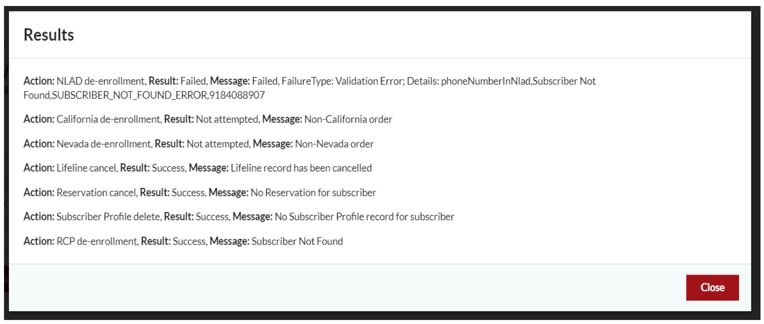
   a. If the customer's Fusion was disconnected the same day, you will receive the error message below.



   b. If the CGM order number (PON number) does not match the Fusion account number, you will receive the below error message.



c. If the customer is de-enrolled successfully you will receive the below error message.



International Long Distance

Effective 5/1/2024, all paid plans for both Assist and enTouch Wireless will include international long-distance (ILD) calls or texts.

Existing customers that would like to have ILD as a feature on their service can upgrade to a paid plan at any time by contacting customer service.

Destination	Type	Minutes
Mexico	Land & Cell	Unlimited
Canada	Land & Cell	Unlimited
UK	Land & Cell	Unlimited
India	Land & Cell	Unlimited
China	Land & Cell	Unlimited
Vietnam	Land & Cell	Unlimited
South Korea	Land & Cell	Unlimited

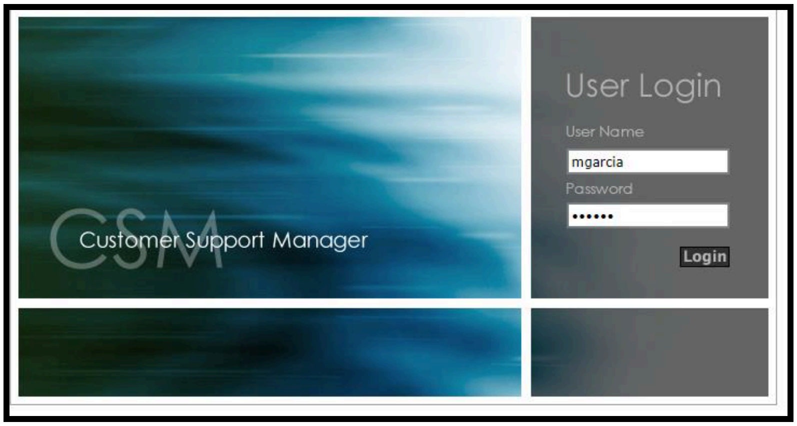
Important Notes

- New Customers will be able to access international calling within 1 hour of enrollment.
- If a customer changes their phone number, they will be able to access international calling again within 1 hour of the change.
- International Long Distance will not work unless the monthly bill is paid
    - If the customer pays their late bill, the International Long Distance feature will be reinstated after an hour
- If the customer's ILD feature is not active within 4 hours, please open a ticket with the Tier2 team.
- CA Customers (ONLY) can choose to buy the ILD feature as a stand alone top up and will have the feature for 30 days

Process to Review Customer's Account

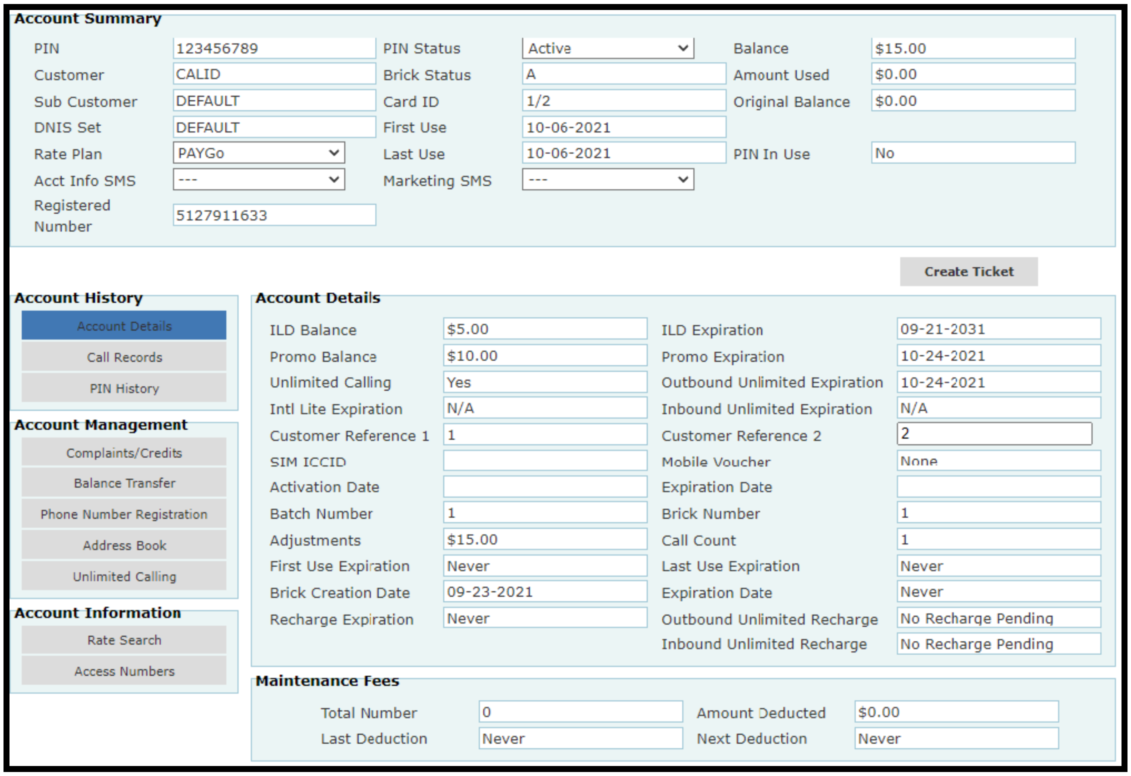
URL: CSM - Customer Support Manager Ver. 2.0

1. Enter Username & Password and click [Log In]

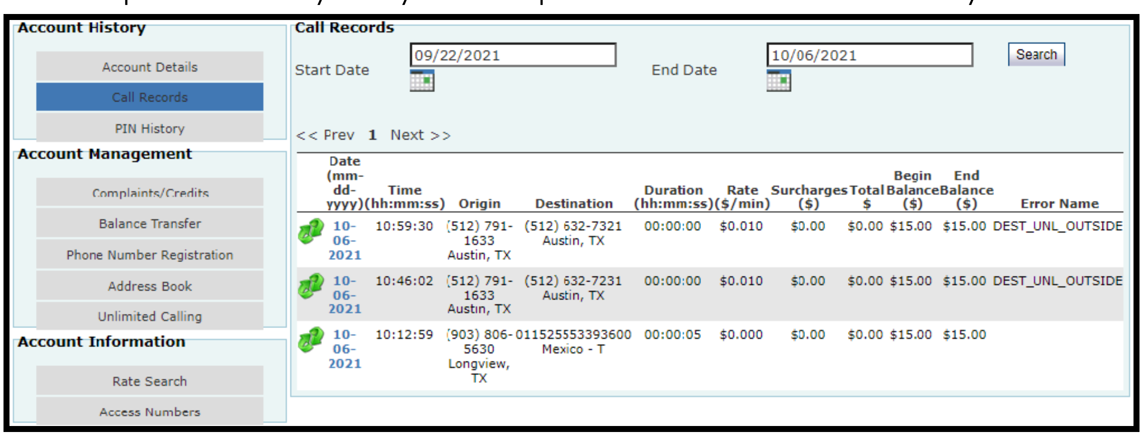


2. Search for customers account by either PIN (Fusion Account #) or Registered Number (MDN)

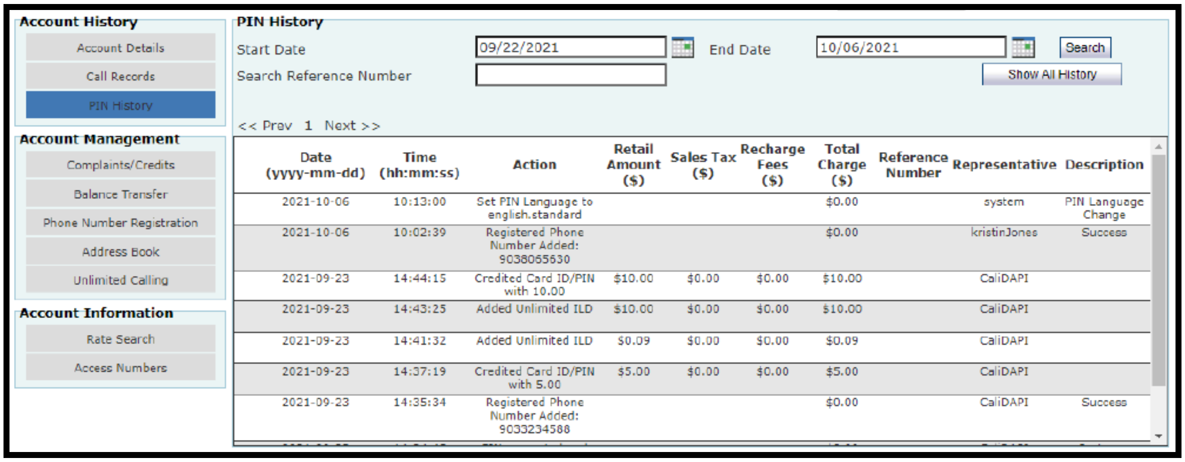
3. The Default Account Details and Summary page will tell you if the account has ever been used and how the account is funded.



4. The Call History tab will show you the call records for the account. The default will only show the previous 15 days but you can expand the search to include 90 days.

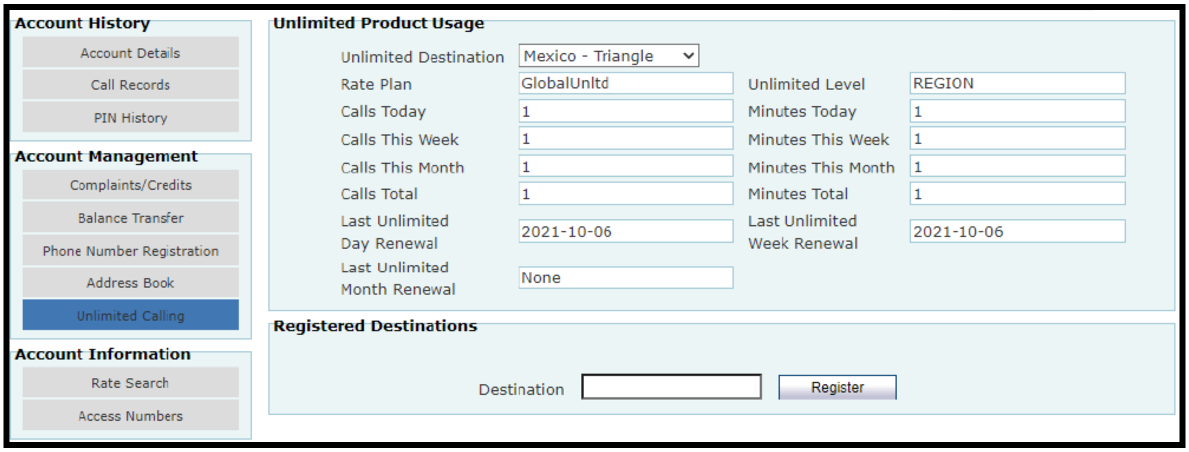


5. The PIN History page will automatically show the previous 15 days. You can click [Show All History] to see the previous year. This will tell you when the account was created, funded, and phone number added.



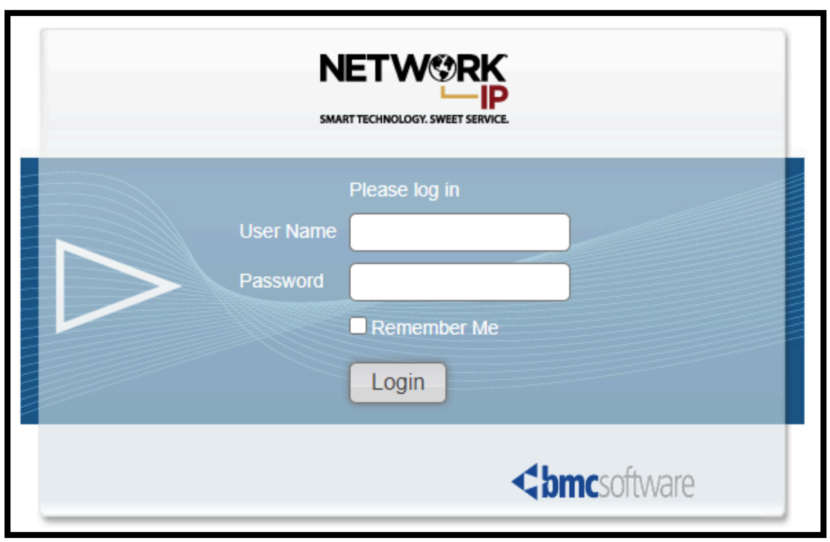
6. The Phone number Registration page will show you the registered number (MDN) on the account.
    a. The example below is a test account, live accounts should only ever have 1 registered number at a time.

7. The Unlimited Calling tab will show you the Unlimited calling summary for this billing cycle. Billing cycles are 30 days. The Unlimited plans allow a max of 15 unique unlimited destinations per billing cycle. The first time the customer makes a completed call to a destination that is covered in the Unlimited plan it will be registered and will show up under the [Registered Destinations].
    a. This should not be changed by customer service except in a rare occurrence where an end user dialed the wrong number. The 15 allowed destinations will reset every billing cycle.



Process to Create Tickets

URL: http://support2.networkip.net/
Username:
Password:



BEFORE OPENING A TICKET:

- Verify that the customer's account can be found in the CSM system.
  - If NOT found, do not open a ticket with Network IP, Instead open a ticket with the Tier 2 team via the Tier 2 Ticket Submissions
- Verify that the call the customer attempted can be found in the customer's call history

- If the call is not found in the call records, DO NOT open a ticket with Network IP, Instead open a ticket with the Tier 2 team via the [Tier 2 Ticket Submissions]
    - Ticket will need to be opened with Plintron by Senior Sales Support team

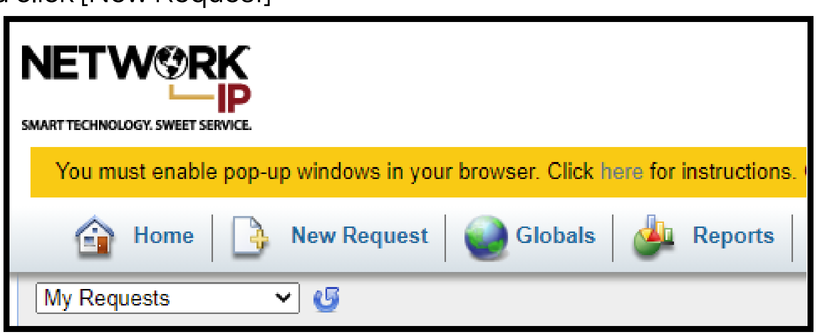
- Verify the customer DOES NOT have Caller ID Block enabled on their device. If they do, they will not be able to make international calls as Network IP needs to have visibility to the phone number before allowing the call to pass through.
- Gather ALL of the required information for the ticket template before opening the ticket with Network IP. Do not open a ticket without a full template.

Ticket Template

Customer's Phone Number:	
PIN:	
Phone Number Dialed:	
Date & Time of Calls:	
Specific Error Received When the Call was Attempted:	

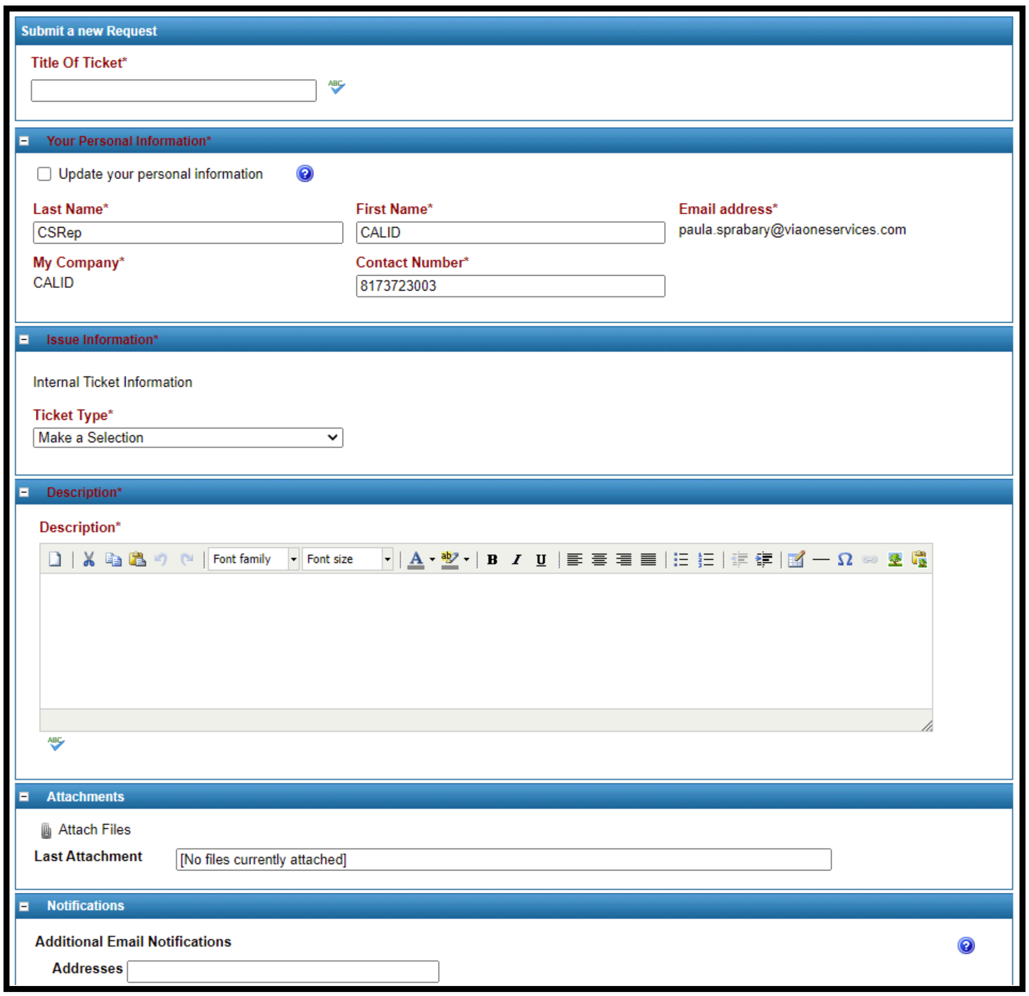
To Open a New Ticket

1. Login and click [New Request]

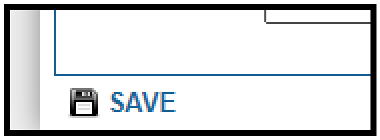


2. Enter the following information:

a. Title of ticket
    i. Customer's Phone or Account Number
b. Ticket type
c. Description of issue
    i. USE TICKET TEMPLATE. DO NOT SEND TICKET WITHOUT COMPLETE TEMPLATE
        1. Customer's Phone Number:
        2. PIN:
        3. Phone Number Dialed:
        4. Date & Time of Calls:
        5. Specific Error Received When the Call was Attempted:
d. Any attachments (if applicable)
e. Additional email addresses to be notified of ticket updates

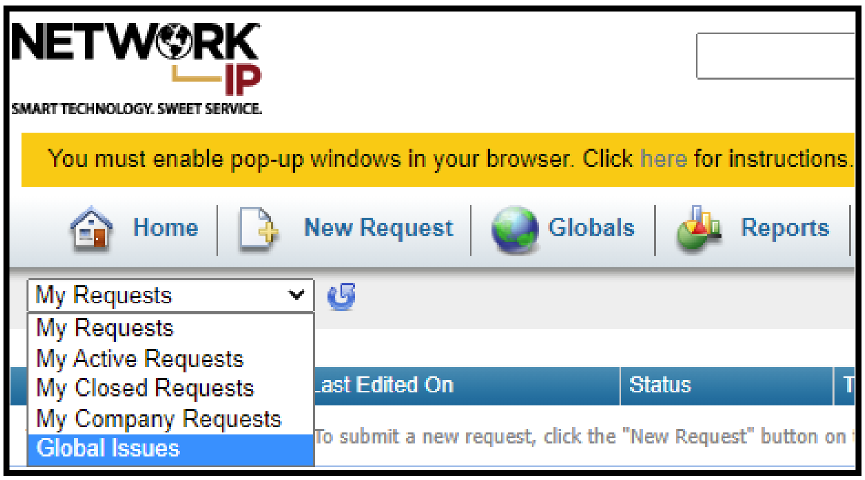


3. Click [Save]

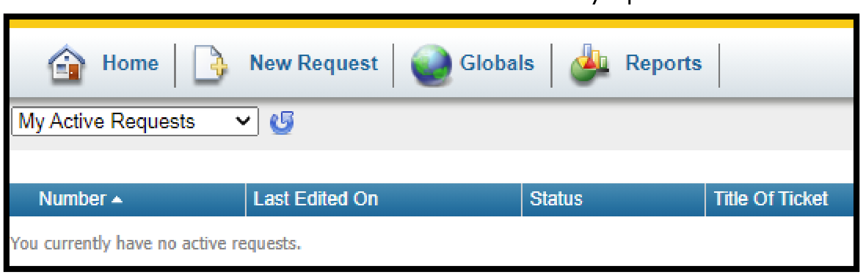


To View the Status of a Ticket

1. On the home page, select one of the options provided

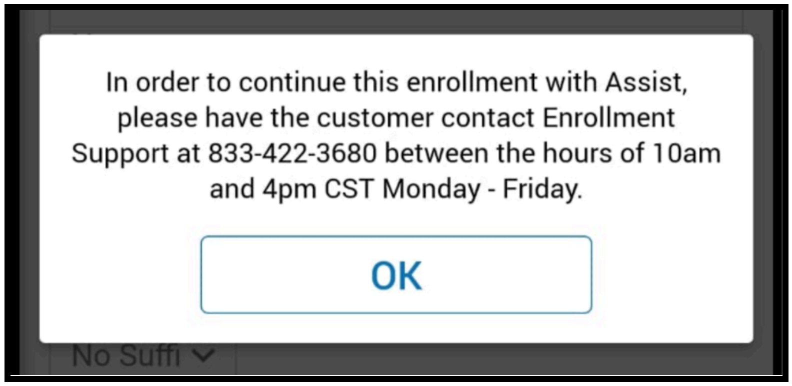


2. Here you will be able to see the current status and any updates made to the tickets.



Enrollment Support

Logic in the CGM system will trigger a pop-up message if a customer has enrolled for Lifeline service multiple times in the past. The order will then be canceled and the message will direct them to contact the Enrollment Support group for further assistance. The CGM Order status will appear as a ***DMD Failure.***



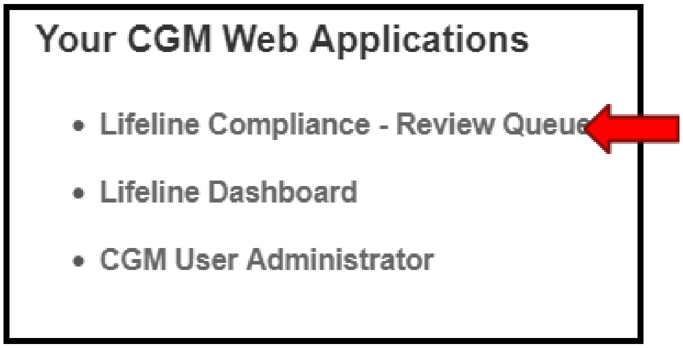
The Enrollment Support group will inform the customer that they are unable to complete an in person enrollment because they have recently applied with another provider and must wait (x) amount of days before attempting to enroll again. The amount of time to attempt to apply varies by customer.

Process for Customer to Enroll

1. Customer or agents will dial 833-422-3680 for Assist Wireless or 888-487-0985 for enTouch Wireless, as directed by the CGM pop-up message
2. The Enrollment Support Agent will look up the customer's DMD failed CGM order to verify how long the customer must wait before attempting to apply again.

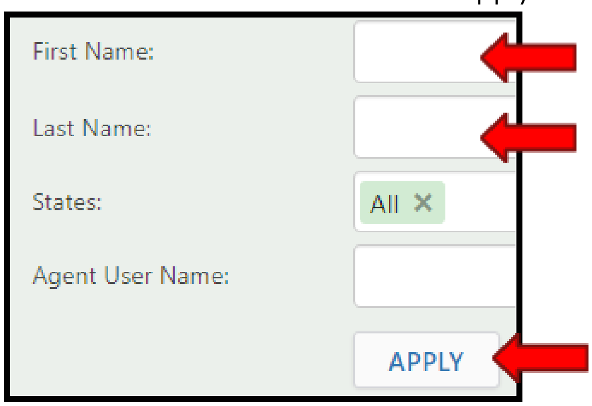
Scripts

1. Opening Script:
   "Thank you for calling (Company Name) Enrollment Support. How can I help you today?"
2. Listen to what the Agent has to say
3. Ask for the order number or the customer's first and last name
4. Look up the order in CGM to determine if they received a DMD Failure
   a. Log into CGM and click on Lifeline Compliance - Review Queue



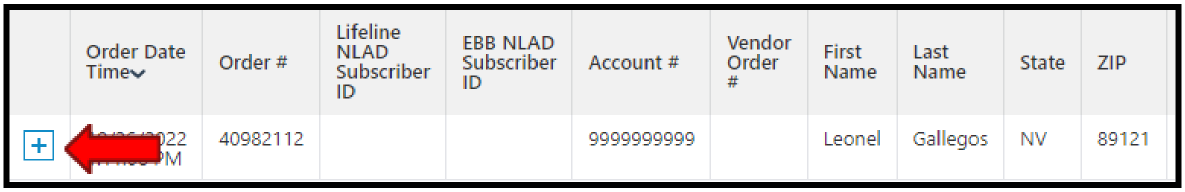
b. Click on Order Lookup

c. Enter in the customer's first and last name and click Apply

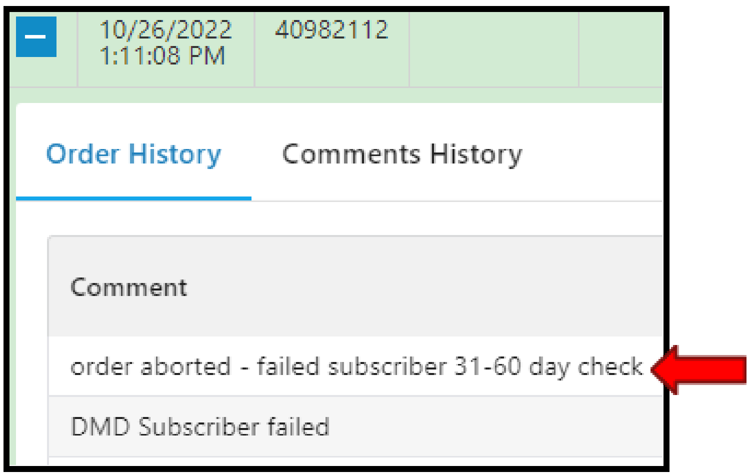


d. If the most recent order shows a **DMD Failure**, click on the blue plus sign to view the order details and check how long the customer must wait before attempting to enroll again. We will always tell customers that they have to wait 30-60 days before they can reapply unless noted otherwise in the order history.

State	ZIP	MDN	ESN/IMEI	Agent Code	Workflow	Review	Status
NV	89121			V1_JesseLewis	RTR		DMD Failure



	Order Date Time	Order #	Lifeline NLAD Subscriber ID	EBB NLAD Subscriber ID	Account #	Vendor Order #	First Name	Last Name	State	ZIP
+	[illegible]	40982112			9999999999		Leonel	Gallegos	NV	89121



–	10/26/2022 1:11:08 PM	40982112

Order History | Comments History

Comment
order aborted - failed subscriber 31-60 day check
DMD Subscriber failed

"The system won't allow us to do an in-person enrollment for you today because our system indicates that you have recently applied or attempted to apply for service with another lifeline provider. You can attempt to enroll again after (enter time the customer has to wait from the comments in CGM)

e. If most recent order shows a DLE failure, or any other failure besides a DMD failure, transfer the customer to the **Agent Relations** team, use the following script:

"I am not showing an order with a DMD failure on our end. I can transfer you over to our Agent Relations team for further assistance."

5. Offer further assistance:

"Is there anything else I can assist you with today?"

6. Closing Script:

"Thank you for calling (Company Name) Wireless. Have a good day."

Promotions

Assist Wireless & enTouch Wireless offers various promotions throughout the year. The following promotions are available to certain customers as detailed below.

Payment Match Promo - Assist Wireless & EnTouch Wireless

Assist Wireless will match all bill payments dollar for dollar up to $20. Payments made as part of a promotional prepayment will not be matched.

Payment Type	Matched
Standard Payment (not for promo)	Yes
Promo Prepayment	No
Top Up Purchases	No
Bill Pay or Swap Fees	No
Accessory/Device Purchases	No

The payment match will be posted by the Operations department within 5 business days. Account credits may only be used towards monthly service invoices or top-up purchases.
Signage will be supplied by the Marketing Department to advertise this promotion.

Example 1

An existing tribal customer chose to take part in the $20 prepay promotion. Because they are existing, they must pay the $20 prepayment.

- This $20 payment WILL NOT be matched.

Example 2

A new customer chooses to pay their first month's bill at enrollment. They pay a total of $5.

- The Operations department will match this payment with an additional $5 account credit.

Example 3

A customer wants to prepay their account for a year. They make a payment of $50.

- The Operations department will match this payment up to $20.

Example 4

A customer pays for $20 worth of top ups.

- This $20 payment WILL NOT be matched.

Auto Pay Enrollment - Assist Wireless

Assist Wireless offers Autopay to customers. When the first successful payment is received, a one-time $5.00 account credit will be posted to the customer's account.

To Enroll the Customer in Autopay

1. Complete the Auto Payment Authorization jotform
2. Call Agent Relations (855-420-2445) and provide the following information
    a. Customer Name (to locate jotform and verify it has been completed)
    b. Billing Address
    c. Name on Card
    d. Credit Card Type
    e. Credit Card Number
    f. Credit Card Expiration

Once the customer is successfully enrolled, the first payment will be processed on the next bill due date. The form must be completely and correctly filled out and signed by the customer before the autopay information will be added to the customer's account.

Birthday and Anniversary Rewards - Assist Wireless

Assist Wireless will be rewarding customers during their birth months and on the first month, six month and one year anniversary of their account start date.

Birthday Credit - Assist Wireless

- Once per month, we will provide each customer with a birthday in that calendar month with the corresponding birthday reward
    - Tribal Customers - $5 Credit
    - Non-Tribal and 9.25 Customers - 100 Talk and 1000 Text
    - Credit can be added at any time during the customer's birthday month but not necessarily on their birth day.

Account Anniversary Credit - Assist Wireless

- Once per month, we will provide each customer whose anniversary date of activating with the company falls within that calendar month the corresponding anniversary reward.
    - Tribal and Non-Tribal Customers
        - 1st Month - $4
        - 6th Month - $6
        - One Year - $10
    - 9.25 Customers - 250 Talk and 2500 Text

Refer A Friend Credit

Refer-a-Friend is our referral program where customers can earn up to $25 in FREE account credit when their friends sign up with us for Lifeline!

The Refer-A-Friend tool located on the Agent Dashboard is where credit requests are submitted. Below are rules for when referring (existing) and referred (new) customers qualify for the referral credits.

- The referring (existing) customer must have service with Assist Wireless at least 1 day (24 hours) before they are eligible for the referral credit.
- Referring (existing) customers are allowed two (2) referral submissions per month.
- Existing Tribal customers will receive a $25 account credit (up to $50 per month.)
- New Tribal customers will receive a $10 account credit.
    - Both new and existing customer accounts will have the credit applied to their account after 60 days, if the accounts remain active.
- Non-Tribal customers do not qualify for Refer-A-Friend credits.
- If a Tribal customer refers a Non-Tribal customer, or vice versa, neither customer is eligible for a referral credit.
- The referral credit can only be used for bill pay and top-ups. The credit cannot be used to purchase accessories or upgraded phones.
- As an agent distributing phones for Assist Wireless, you are not eligible for referral credits.
- Referral requests for referred (new) customers must be submitted within 48 hours from the time the referred (new) customers account is created. Best practice is to submit referrals at the time the new account is created or by the end of the day.

Love Your Phone Promo

New Assist Wireless Customers who do not absolutely love their phone can switch it out for free twice within the first 60 days of activation.

Guidelines:

- This program is only available in Oklahoma.
- At the time of the phone switch, the Customer must be "active" and their account must be in "good standing," which is defined as having all past due invoices paid in full.
- The Customer must provide the original phone (the one they "don't love") in approximately the same condition as they received it and cannot be damaged.
- Tribal customers may upgrade their device for another of equal or lesser value (up to $65 retail value)
- Non-Tribal customers will receive 100% of the current device amount as a discount towards devices within the 60 day LYP period.

- Customers may swap their device twice within the first 60 days of activation.

Customer Online Portal - Assist Wireless

Assist Wireless customers are able to create an online account to check their voice, text, and data balance, purchase a top-up, and pay their bill.
Assist Wireless Customers who sign up to use the online portal get $5 credit for the first login, $5 credit for the first payment using the online portal.
Below is the link to create an account:
URL - *https://portal.assistwireless.com/*

FreeCast

Notice of SMS Campaign

New Free Offer for Select enTouch Wireless and Assist Wireless Customers

Effective September 6th, we will begin texting customers to offer them free streaming services through our new partner, “FreeCast”.

What is FreeCast?

FreeCast is a streaming service that provides:

- Access to 500k free on demand movies and shows and over 700 live channels ● A hub to link existing premium subscriptions like Hulu and Netflix to one convenient place.
- FreeCast can be streamed on android or Apple mobile devices, From a firetv, Apple TV and other streaming devices!

How Customers Can Use This Service

1. Customers will *first* need to sign up through our referral links to receive this offer:
   a. Assist: https://www.freecast.com/partners/assist-wireless
   b. EnTouch: https://www.freecast.com/partners/entouch-wireless 2. After signing up, customers may download the app and log in to use the service.
2. Streaming uses Wi-Fi or Cellular Data.

Sample Messages

- *From enTouch/Assist Wireless: We have partnered with Freecast to provide our customers free streaming of movies & shows! Learn more or Sign Up here: [link]*
- *Update from enTouch/Assist Wireless: Your free Lifeline/ACP Service now includes free streaming! Learn more or Sign Up here: [link]*
- *Free Streaming from enTouch/Assist Wireless: Have you tried Freecast streaming services yet? Register free today: [link]*
- *From enTouch Wireless: Your enTouch Wireless Lifeline/ACP plan includes free streaming through the "Freecast" app. Sign up for free TODAY at [link]*

System Errors

The following errors are the most common that a sales representative can come across during the enrollment process or during any actions taken on a customer account. Explanations are provided with each error message and if there is a specific error message not listed, please contact Agent Relations and provide the screenshot with the following information, if possible:

- System the error message was displayed (CGM, Fusion, National Verifier)
- What was being done when the error message appeared (enrolling a customer, swap, submitting payment, etc.)
- Order number, account number, device ID, etc.

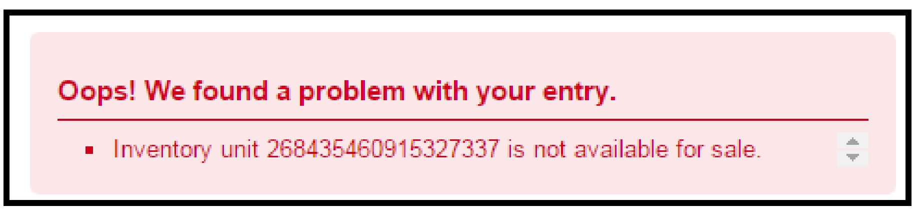
Once this information has been submitted, Agent Relations will escalate to the Operations Team to be reviewed, determine the resolution and update this document.

For a full list of errors and resolutions please refer to the Systems Error Guide

Fusion Errors

"Inventory unit is not available for sale" when attempting to purchase inventory.

This error occurs when the inventory status for the inventory attempting to be sold onto a customer account isn't in "Available" status.



Resolution: Contact Agent Relations to have the inventory set to available. When the inventory has been updated, the purchase should complete successfully.

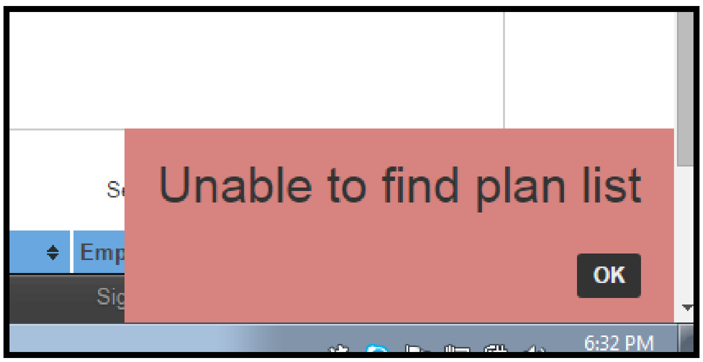
"Inventory unit is not available for sale in warehouse" when attempting to purchase inventory.

This error occurs when the warehouse for the inventory attempting to be sold onto a customer account isn't set to the correct warehouse for the seller/store.

Resolution: Contact Agent Relations to have the inventory updated to the correct warehouse. When the inventory has been updated the purchase should complete successfully.

Unable to find Plan List

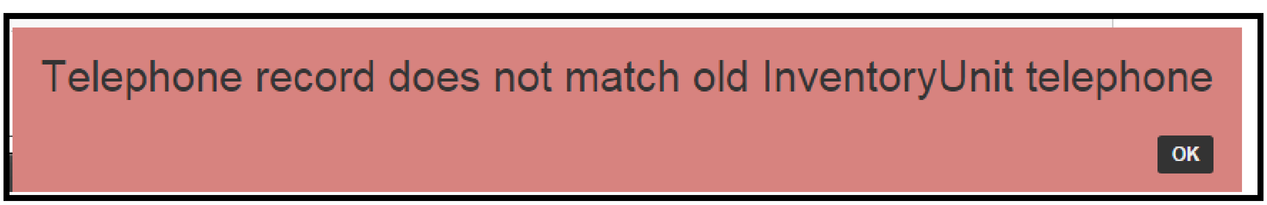
This error usually occurs when creating an account or during a swap and is due to the inventory type being incorrect in Fusion.



Resolution: Contact Agent Relations to report the issue and have the inventory updated in Fusion. Once Agent Relations have updated the inventory, resubmit the order/swap and it should process correctly.

Telephone record does not match old InventoryUnit Telephone

This error usually occurs when attempting to swap an IMEI onto an account when the current IMEI is listed in a status other than “Sold”. Fusion is finding no record of this unit being attached to any account resulting in the error when attempting to swap.



Resolution: Contact Agent Relations and inform them that you are receiving this message. They will need to manually sell out the IMEI currently on the account. Once this is completed, you should be able to swap the new IMEI onto the account successfully.

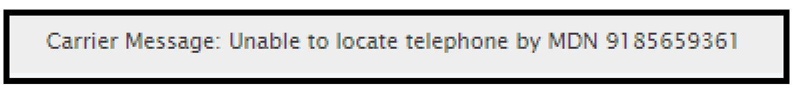
No coverage Available

This error occurs when a swap or new enrollment is being processed and the customer's address is in an area where there isn't T-Mobile or Sprint coverage.

Resolution: Contact Agent Relations and provide them with the ESN or SIM you are attempting to use and request that they preactivate the inventory with a zip code other than the one on the account. Once they preactivate the device, swap the ESN onto the account.

Carrier Message: Unable to locate telephone by MDN

This message occurs when the phone number is no longer active at the carrier level and cannot be retrieved.



Resolution: Contact Agent Relations and have the ESN or SIM preactivated and swap it onto the account to make the account back active.

CGM Errors

Error Message "THERE IS NO T-MOBILE NGP ASSOCIATED WITH ZIP"

This error is received when T-Mobile does not have any MDN's available for that specific zip code.

Resolution: Contact Agent Relations to have the order cleared and have the SIM card preactivated with the desired area code. Once both have been completed, the customer can be re-entered. **California customers will need to wait up to two business days before being retried**.

Error Message "Prior Lifeline Internal to Client"

This error typically means that a customer was disconnected but the reservations within CGM have not been successfully cleared.

Resolution: Contact Agent Relations with the order number and they will clear out any reservations in CGM.

NLAD Offline

This error appears when NLAD is having a system outage.

Resolution: Contact Agent Relations with the order number to escalate this error message. The operations team will need to get in contact with the NLAD support team to resolve the error.

MDN should not be empty.

This error appears when the SIM used by the agent was previously provisioned and then disconnected.

There was an error with your order

Input error: MDN should not be empty.

Resolution: Contact Agent Relations to have the order canceled and a NEW SIM card will need to be used on the new order.

Device Lookup Not Found

This error typically means that the device you are attempting to use is not assigned to your username

Status: Failure, Message: IMEI 356938003678407 not found, RetryNeeded: null

Status: Failure, Message: IMEI 356938003678407 not found, RetryNeeded: null

Resolution: First, verify that the inventory is assigned correctly to your agent ID in Fusion. If the inventory is assigned correctly, manually type in the device ID into the correct field on the order. If the message is still appearing, contact Agent Relations with the device ID, order number and error message.

955 - XML Parsing Failed: test:1:52 error: value '###############' does not match regular expression facet '\d{19,20}'

If an agent receives this message, it means that during the order process the agent scanned the IMEI first instead of the SIM card.

955 - XML Parsing Failed: test:1:52 error: value '356938003194082' does not match regular expression facet '\d{19,20}'

Resolution: Contact Agent Relations to have the order cleared out and have the inventory made back available again.

289- GEN-0289: INVALID ZIP

This error is due to phone numbers not being available in the zip code the customer resides in.

289 - GEN-0289:Invalid ZIP
You can try to correct the error or cancel the order.

OK

Resolution: Contact Agent Relations to have the order and pending account. The SIM would need to be preactivated with a different zip code than what the customer resides in. **California customers will need to wait up to two business days before being retried.**

Validation Error; Details: sac,Cannot transfer a subscriber to the same SAC number.,CANNOT_TRANSFER_SAME_SAC,439046

This error is due to the customer having an existing account in Fusion or their old Fusion account was not cleared properly.

order aborted - nlad cannot transfer same sac
Transfer Subscriber result: FailureType: Validation Error; Details: sac,Cannot transfer a subscriber to the same SAC number.,CANNOT_TRANSFER_SAME_SAC,439046
Finish TransferSubscriber at: 8/12/2019 12:52:51 PM EST

Resolution: Pull up the customer's account using the last name and the last four of the SSN. If the account is Prepaid, the agent will need to contact Agent Relations to have any reservations cleared.

Subscriber already exists in NLAD

The message is due to the customer's information already existing in NLAD.

> **There was an error with your order**
>
> This subscriber already exists in NLAD.
> This order was cancelled.

Resolution: Search for the customer by their last name and last four of SSN in Fusion. If a lifeline account is found, inform the customer that they already have service. If the account is Prepaid or in Final Bill status, contact Agent Relations so that they can escalate this customer to the Operations Team.

Duplicate Address

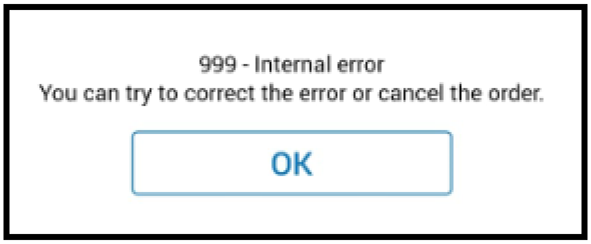
This message appears when there are duplicate transactions with the same address.

> **There was an error with your order**
>
> Since applying with the National Verifier, the subscriber in this transaction now has a duplicate address with another subscriber. Please contact the National Verifier Lifeline Support Center at 1 (877) 524-1325 to re-initiate a new application including the One Per Household worksheet. Notify Lifeline Support Center Rep that order is receiving "DUPLICATE_ADDRESS_NLAD" upon transfer attempt. Please re-apply once the new application has been completed. This order will now be cancelled.

Resolution: Contact National Verifier to begin another application and include the One Per Household worksheet.

999 Internal Error

This error typically occurs when the carrier is having an internal error.



Resolution: Contact Agent Relations and they will need to escalate the message to the Operations Team To have it escalated to the carrier. Agent Relations will verify that all orders and pending accounts have been cleared.

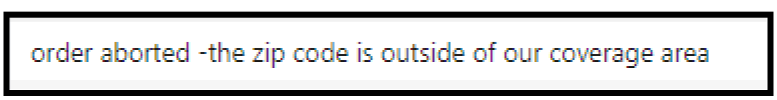
298 - GEN-0298:Error provisioning to number management system. Please contact system administrator

This error message typically appears when T-Mobile is having errors provisioning a phone number.

Resolution: Contact Agent Relations and they will need to escalate the message to the Operations Team to have it escalated to the carrier. Agent Relations will verify that all orders and pending accounts have been cleared.

The zip code is outside of our coverage area

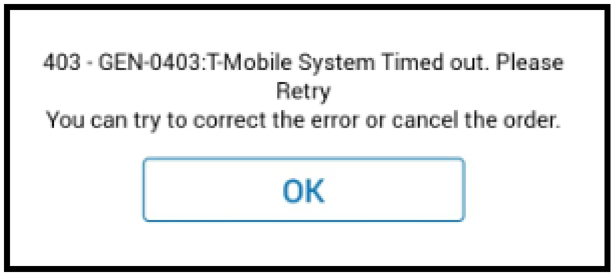
This error message typically appears when the address the customer resides in is not within our coverage area.



Resolution: Verify that the address inputted into the order matches the address the customer provided.

403 - GEN-0403:T-Mobile System Timed out. Please Retry

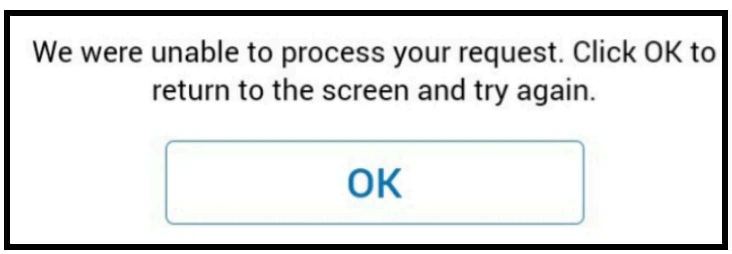
This error means that T-Mobile has unexpectedly timed out.



Resolution: Contact Agent Relations and provide the order number. They will need to escalate the error to the carrier. Agent Relations will verify that all orders and pending accounts are cleared.

We are unable to process your request.

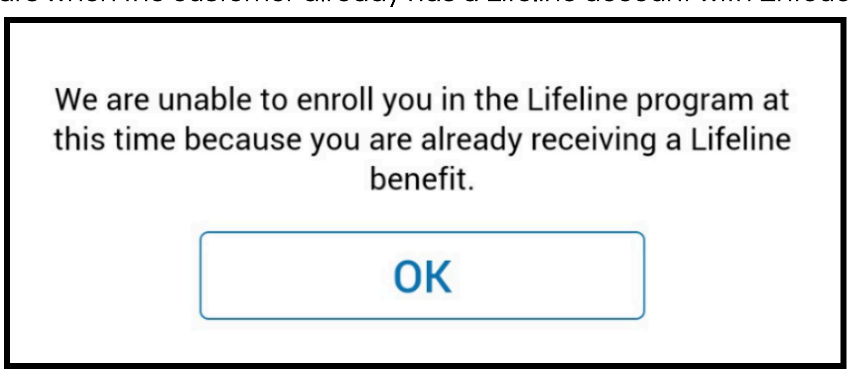
This error means that there was an issue with the order in CGM.



Resolution: Contact Agent Relations and provide the order number. They will be able to see what the issue is and provide more information.

Lifeline Benefit Duplicate

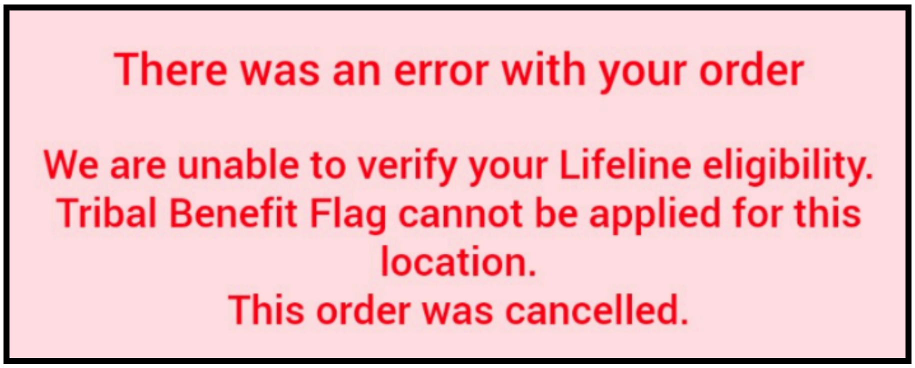
This error appears when the customer already has a Lifeline account with Entouch Wireless.



<u>Resolution:</u> Contact Agent Relations and provide the last name and last four of the SSN and they will provide the active lifeline account number or clear any reservations

Tribal Benefit Flag

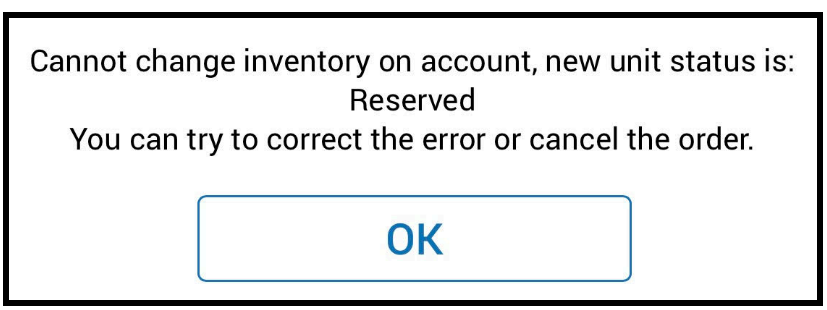
This error appears when CGM has determined that the address is Tribal but National Verifier determines the address is in Non Tribal territory.



<u>Resolution:</u> The representative would need to contact National Verifier and determine why the address is considered Non Tribal.

Reserved Inventory

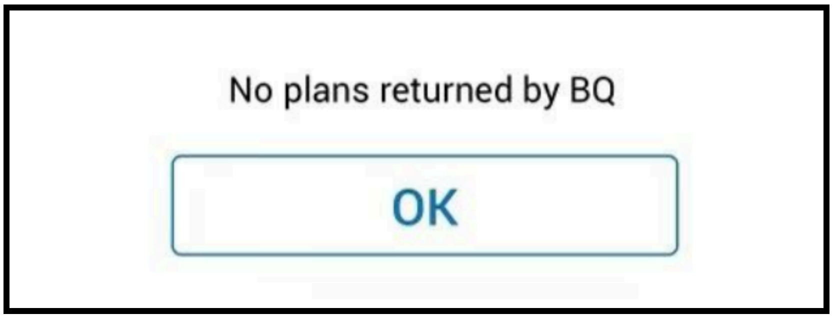
This error appears when the inventory that is being used is in Reserved status in Fusion instead of Available.



<u>Resolution:</u> Contact Agent Relations to have the order cleared and the inventory made back available.

No Plans returned by BQ

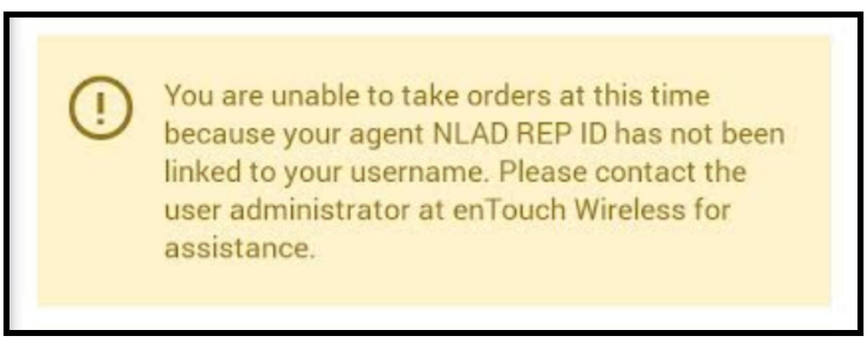
This error means that the inventory being used has the incorrect inventory type, is listed under the incorrect carrier or is not associated with the correct plan in Fusion.



Resolution: Contact Agent Relations and provide the order number and inventory and they will need to escalate it to the Operations team to get it corrected.

NLAD REP ID not linked

This error appears when the NLAD rep ID has not been linked to sales representatives to their CGM username.

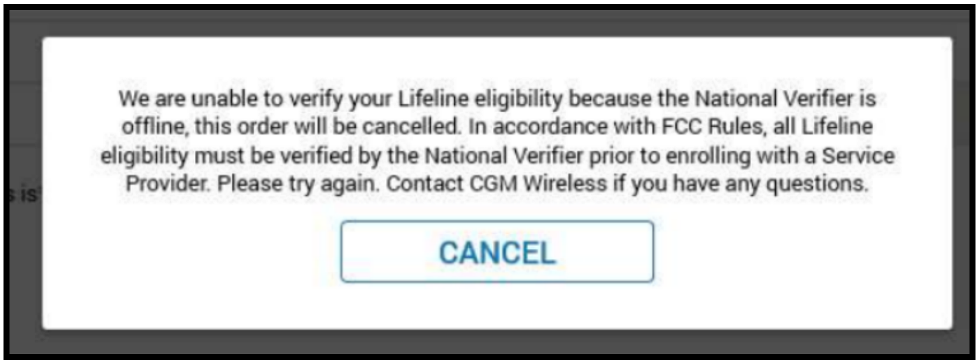


Resolution: Please reach out to the Tier2 team to determine if the agent's rep ID is correctly linked to their CGM username. This error message can also appear if the auditor's rep ID is not linked or if the agent needs to complete their yearly agreement.

National Verifier Errors

National Verifier Offline

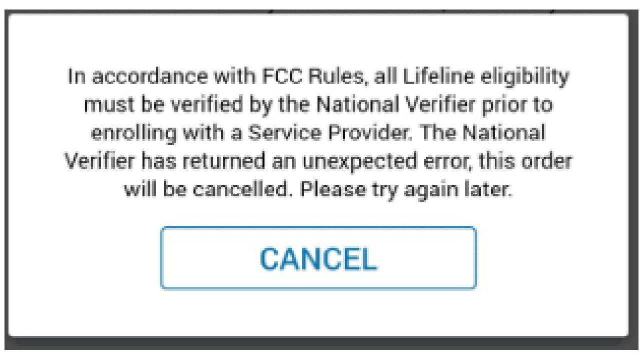
This error appears when the National Verifier is having a system outage.



Resolution: Contact National Verifier and inform them that you are receiving "National Verifier is offline" when attempting The order will need to be cleared in CGM. If the order is still pending NaV Review then the order cannot be cleared until the National Verifier Auditor renders a decision.

National Verifier has returned an unexpected error message

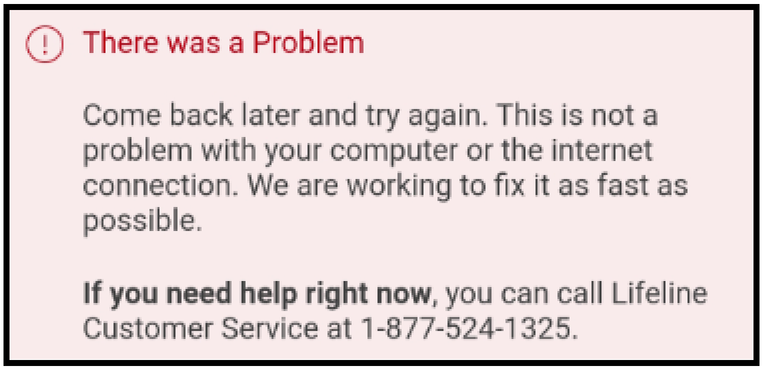
This error message occurs when the National Verifier is experiencing technical difficulties with their portal.



Resolution: Contact the National Verifier and inform them that this error appeared when processing an order and their representative will have to open an internal ticket.

Connection Error

This message is due to an error in the National Verifier's system.



Resolution: Please contact the National Verifier to escalate this issue.

Cut Off

The documents(s) could not be reviewed because they were partially cut off.

Resolution: Resubmit the documentation with all necessary information visible on the order. If the issue persists, contact the National Verifier.

Expired Document

The document(s) expired

Resolution: Resubmit the NaV order with unexpired documentation. If the issue persists, contact the National Verifier.

Income Requirement Not Met

The household income is higher than the 135% of the federal poverty guidelines

Resolution: Resubmit the NaV order with proper documentation that show the customer is within the 135% of the federal poverty guidelines. If the issue persists, contact the National Verifier.

Invalid Document

The document(s) is invalid and cannot be approved

Resolution: Resubmit the NaV order with proper valid documentation. If the issue persists, contact the National Verifier.

Invalid Qualifying Program

The document(s) is not for a Lifeline qualifying program

Resolution: Resubmit the NaV order with proper valid documentation. If the issue persists, contact the National Verifier.

Missing or Incorrect Address

The document(s) is either missing the applicant's address or does not match the address on the application.

Resolution: Verify that the address on the application matches the NaV order and resubmit the order. If the issue persists, contact the National Verifier.

Missing or Incorrect DOB

The document(s) is either missing the applicant's date of birth or does not match the date of birth on the application.

Resolution: Verify that the DOB on the application matches the NaV order and resubmit the order. If the issue persists, contact the National Verifier.

Missing or Incorrect Name

The document(s) is either missing the applicant's name or does not match the name on the application. If the issue persists, contact the National Verifier.

Application needs updated information.

This application has been rejected by the National Verifier for the following reasons:
Eligibility proof issue: MISSING_OR_INCORRECT_NAME
The document(s) is either missing the applicant's name or does not match the name on the application.

Please click on the button below to be directed to the National Verifier.
Contact Lifeline Support Center for Details: 800-234-9473.

Resolution: Verify that the Name on the application matches the NaV order and resubmit the order. If the issue persists, contact the National Verifier.

Missing or Incorrect SSN4

The document(s) is either missing the applicant's SSN4 or does not match the SSN4 on the application.

Resolution: Verify that the last four of the SSN on the application matches the NaV order and resubmit the order. If the issue persists, contact the National Verifier.

Missing Program Income Info

The document(s) is missing program/income information needed to confirm eligibility.

Resolution: Verify that the order contains the proper documentation and resubmit the Nav order. If the issue persists, contact the National Verifier.

Missing Proof Emancipation

The document(s) does not verify the applicant's status as an emancipated minor.

Resolution: Verify that the order contains the necessary proof that the applicant is an emancipated minor and resubmit the application. If the issue persists, contact the National Verifier.

Missing Proof Life Document

Please provide a copy dated within the last three (3) months of either a utility bill, income statement such as a paystub, mortgage or lease statement, retirement/pension statement of benefits, or a notarized letter affirming the subscriber's identity and alive status.

Other

Please contact the Lifeline Support Center with the Application ID to find out why we could not accept the document(s).

PO Box

P.O. Box addresses cannot be provided.

Resolution: Resubmit the order with valid proof of address. If the issue persists, contact the National Verifier.

Unclear Documentation

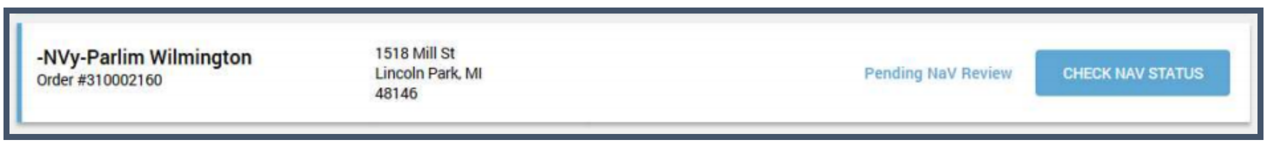
The document(s) could not be reviewed because it was too blurry, dark, faded, or too small.

Pending NaV Application

Status means that the Nav Application process is not complete. **This message should not appear often, as CGM walks you through the application process.**

Pending NaV Review

The order is still in the "Pending Review" queue - has not been picked up for review by an auditor.



Pending NaV Eligibility

The auditor is currently reviewing the order to render a decision or request additional information.

Escalations

If you are unable to resolve an issue through standard procedures or troubleshooting methods, an escalation ticket will need to be submitted to the appropriate department or to the Tier 2 Team via Asana by the supervisor on duty. Smile Team: Complete the template below and submit via email to the supervisor on duty. <u>You must submit a separate ticket for each individual customer.</u>

Template for General Ticket

Link: https://form.asana.com/?k=M8Jz8sg70uNzyHl20zKEqg&d=349413855532

Tier 2 Ticket	Response
Ticket Type	(Unable to Enroll Lifeline or ACP, Dashboard Tool Errors, CGM Errors, Fusion Errors, Service Issues, International Calling Issues)
Submitter Name (Your Name)	
Company	
Customer's Account Number	
Customer's Phone Number	
What is the Issue?	
Handset Make and Model	
Whether the handset changed recently (any swaps)	
If yes, is the same issue appearing on the new device?	
Date and Time the issue occurred or the customer called	

Location of the Customer or Agent (State & Zip Code)	
Alternate contact number for the Agent/Customer	

Template for Incorrect Caller ID

- If a T-Mobile , GSM **(Prepaid Wireless Group**) customer is wanting to update their caller ID due to it displaying someone else's name, advise the customer that the carrier is only able to change the caller ID to reflect "Wireless Caller". Advise the customer that the change should take effect within 3 business days.
    - Fill out the template below and email to support@prepaidwirelessgroup.com from the salesagentrelations@viaoneservices.com email address.
- If the carrier is Plintron or Assist Wholesale, fill out the template below and a ticket will need to be submitted to the Tier 2 Team via Asana by the supervisor on duty.

Update Caller ID	Reponse
Customer's Phone Number	
Customer's Name	
Incorrect name displayed on the caller ID	
Last 2 phone numbers dialed that displayed the incorrect caller ID	
Alternate contact number for the Agent/Customer	

Template for Carrier Errors Affecting New CGM Orders

Tier 2 Ticket	Reponse
CGM Order Number	
SIM card or ESN used in the CGM order	

What error message is being displayed?	
What is the order status?	
Date and Time the issue occurred or the customer called	
Alternate contact number for the Agent/Customer	

- *The response time from the Tier 2 team can be up to 2 business hours, however if the issue needs to be escalated to a carrier it can take up to 2 business days , so you should set the expectation with the customer or agent that their issue will not be resolved immediately.*
  - **Script:**
    - "Mr./Ms. [*Last Name*], I will need to escalate your issue for resolution. Just to confirm, the issue is {*Summarize the details of the issue(s) the customer or agent is having. This should already be typed up in your draft email so that you can add/edit while on the call with the customer.*} Is this all correct? It generally takes anywhere from 2 business hours to 2 business days to get a response from the carrier. If you have not heard from us by *[give date of 4th business day]*, please give us a call back. Is there anything else I can assist you with today?"

Change Log

Version	Date	Changed By	Description of Changes
1.0	3/20/2023	Maritza Garcia	Creation
2.0	7/17/2023	Maritza Garcia	Added Panda Mobile Warranty info
3.0	9/11/2023	Maritza Garcia	Added FreeCast Promo

4.0	6/19/2024	Maritza Garcia	Added new fee for MDN swaps