1. Scenario:
   At 00.19 the customer made an indication the phone is not programmed. In addition at 1.25 we can see there is a reactivation OTA. Looking on the ESN 014496006763761 we can see there was a previous interaction number 1459827937 indicating the phone was not accepting the codes. Based on research, the phone is not programmed. This in turn indicates the phone cannot receive the SMS. Should the CSR still attempt to send the SMS or could move to step number 3 if the customer is asking to deactivate the phone?

   Regarding this scenario, CSRs don't need to send the SMS because the customer is not going to receive it.

2. Using the EID as reference 32809558, on the CSR tool it says HHWS Picture Form is required. Can we get an explanation as to what is the next process to follow for the customer to be enrolled as SafeLink?

   

Document	Status
Application form	Approved
Qualification proof	Approved
USAC Worksheet	Approved
HHW/Picture Form	Required

   According to the CSR tool, if the HHW/Picture Form is required, this is because the applicant's picture is different, is not visible, or is the ST agent's face, therefore, the applicants must attach a valid and clear picture of themselves for the enrollment to be qualified.

3. If IMEI serial number is active and customer called to activate the replacement SIM CARD. When at the transaction summary and it shows an internal port in case, should be transfer the call to port or allow the customer to wait? Please refer to file number 9129288559450000191?

   This file is no longer available in QM. In regards of the question, if the phone was active and there was only a SIM modification which created an Internal Port Ticket, CSRs need to verify if the port Ticket does not have notes to transfer the call to the portability department.

4. What is USAC Worksheet? Is it the same as Household Work Sheet?

   It is the same as the initials USAC - "Universal Service Administrative Company", the one providing the service and the Worksheet is not different. The only difference on a worksheet is the way it is submitted (Recording Script, New enrollment, via CSR, Recording Script Spanish as such).

5. Using ESN 358837074759633, their enrollment ID is enrolled/qualified but wants to buy the either $10 for 350 minutes and 30 days of the $15 unlimited plan but TAS is not giving the options to do so. What is best resolution the customer can be given in this case?

   According to TF # 003.2017 UPDATED SafeLink Unlimited Plans 03 02 17, if the customer's phone is a PPE/ feature device, such is the customer's case, they will only have the option to purchase the $15 Unlimited Plan (WEB, TAS or MoneyGram) and that's the plan available to purchase on the customer's account. For Smartphone/BYOP customers they can buy any of the four unlimited plans.

6. Street Team agent helped customer to apply. Customer was qualified and should get the serial number 014866001196870 but now the customer claims street team agent did not provided the physical phone. There was no lifeline case which we can exception/exception release to resend the phone via TAS. Can we treat the phone as a lost/stolen or what process to follow? Enrollment ID 32746442

   According to S.T.R.E.E.T. Manual - page 75, if the account is already Enrolled (customer's scenario), but the customer does not have a cell phone, the Street Team agent will have to get in touch with Tech Support to schedule a Resend Phone for the customer. However, it is really important to verify first if everything is correct (there are no pending proofs to submit), before proceeding to send the phone the customer. The Resend Phone procedure can be found under the CSR tool; http://csrhelp.vmbc.com/articles/041-Resend-Phone-Escalation.

7. When street team agents call in, should we ask the reason why the enrollment id should be rejected?

   Yes, due to the rejection reason field since the box needs to be completed in order for the action to be processed.

8. If the customer is calling from the phone but has issues with SMS. After asking for the alternate number. Should we provide the direct response number?

   According to the SUP ERD CALL HANDLING & TRANSFER GUIDELINES, if a case or situation exists in which the issue is caused by TracFone (or any of brand) and has not been resolved, CSRs must provide the Direct Response Hotline # and Reference PIN assigned to the brand.

9. In efforts to not be penalized in QA, what would be the appropriate dropdown of the "results" section of the interaction to select when the call was released due to the "dead-air call" situational script?

   The appropriate result should be "Hang up/Disconnected".

10. What script should we follow when offering the auto refill for Simple Mobile customers that have a smart phone as the Auto-Refill Discounts for All Brands Chart only offer discounts for Simple Mobile PPE phones? As the TF#74 Auto-Refill Enrollment Spiel states for other brands "Would you like to save $X.XX right now and $X.XX every month after your first redemption?" but we have no information on the discounts applicable for the cards, Can an agent use the spiel for ST: "Would you like the convenience of enrolling in our auto re-fill program?" without being penalized in QA?

    If there is no discount for the plan involved, yes, you can use the ST spiel as the main objective is to offer Auto Refill to the customer and so far Auto Refill is available for Simple Mobile for around 10 service plans. For situations when there is a discount for Auto Refill, please use the spiel for the discount business as usual and you can retrieve the smartphone discounts on the Simple Mobile website.

11. If a customer calls asking questions about a specific topic and the reason of the call is general information/questions and the CSR provides the wrong answer is no information relevant is provided, will the points be deducted in resolution or information?

    If the customer asked something regarding the specific topic which was the main reason of the call and the CSR did not provide the expected information, points will be deducted in the "Resolution" section. If the customer's main concern was successfully resolved/answered, but the customer had additional questions and the CSR did not provide correct information, points will be deducted in the "Information" section.

12. Are agents required to create an interaction even if a case is created for a pending issue or every time even though a case is created and issue is resolved? As per indications in the Training flash TAS Interaction Enhancements: "You are now required to create an interaction for each call, even instances when you need to create a ticket for further resolution?

    There is no exception. CSR need to create an Interaction even when a Ticket was created.

    a. Should an interaction be created when an IT Toss is created? **Yes**
    b. Should an interaction be created when an Upgrade case is created? **Yes**
    c. Should an interaction be created when a Compensation/Replacement Units is created? **Yes**
    d. Should an interaction be created when a Replacement Phone case is created? **Yes**
    e. Should an interaction be created when a SSME ticket is created? **es**
    f. Should an interaction be created when a Manual Refund Case/ DSE Case is created? **Yes**

13. Is an agent allowed to re-brand a CDMA BYOP phone using the universal branding link if the phone was registered with the wrong brand or if the customer wishes to use it with a different brand?

    If the phone model/technology is applicable for the branding, then yes it can be done for certain brands, with the exception of Simple Mobile. If the phone is from Telcel, it can be rebranded to any brand (exempting Simple Mobile), but not from any brand to Telcel.

14. If the customer is calling from the phone to transfer their service because they don't have another line and an internal port is created in the system, Can the agent just provide the instructions to complete the activation or is the agent still required to transfer the call to port, even though the customer does not have the phone with them?

    They are required to transfer the call to port since the next department is not only required to troubleshoot the customer's phone, but to complete the port transaction.

15. CSR stated he needed to compare information with the one he had on the system, agent is not completing a moving action, as he/she is comparing the data on the account with what customer stated, can agent be penalized agent as he was honest about the actions being done and comparing data those not require agent movement.

    Agent can compare the information and the time would depend on what they are comparing.

16. To verify if a BYOP phone is compatible with our service, even if customer states they will be using previous phone service and have some information like zip code, in order to check the eligibility of the device the agent needs to ask for the zip code in which the customer would be using the phone the most of the time and this may be deferent than the one populated by the system, will agents be penalized if so?

    No.

17. In scenarios where the customer is not calling from the handset but does not have the phone with him/her, what flow should we follow? Should we follow the flowchart for calling from the handset?

    No. The customer is not calling from the phone and they do not have the phone with them.

18. After porting a number to different carrier, can the customer request for the phone to be reactivated with another number using the remaining service days?

According to TracFone Product Training - page 10, "if the service is deactivated, the customer can request for service Reactivation. Airtime which remained unused at the time of deactivation will still be available and will be provided back to the customer at the time of reactivation, knowing that there are still remaining service days left on the phone. If there is no service days left on the phone at the time of reactivation, then the customer will be required to purchase and add a new airtime card".

19. Clarification for checking data after reactivation.
    TF # 015.2017 from TF #071.2016 UPDATED Welcome Call for Activations, Reactivations and Upgrades
    "Upon completing an activation, reactivation or upgrade, the Transaction Summary will appear. After reading the Transaction Summary to the customer, you must ensure that the phone has been successfully activated or the phone number has been completely transferred and the correct number of minutes was received. You must remain on the line with the customer until a test call can be done and data is working properly. If the transaction has been completed but the phone is still not working, follow necessary troubleshooting (business as usual).
    Based on this part of the training flash, does it mean that we are required to remain on the line for the transactions mentioned until a test call can be done and data is working properly?

    There is no Flowchart for Reactivations and CSRs are not required to test data for this specific transaction. For Activations and Phone Upgrades, CSRs must follow the Flowchart BAU.

20. Since flowchart for Unable to call ILD is available in Agent Support and its target audience are "all representatives", does this means that CRT and Sup ERD agents are allowed to follow the flow even if they're not ILD trained?

    Yes, they must follow the Flowchart since the steps were implemented with the objective to follow basic procedures. The flow includes instructions for when the result was unsuccessful, CSRs need to transfer to the VAS team for further troubleshooting.

21. In relation to question number 3, would it be a mark off if you ask the customer to test its data when you're aware that the customer is using a featured phone with no browser option?

    Not all feature phones have browser option. In addition, if the CSR is not going to test the customer's data, they should make sure the customer's phone is not applicable for web browsing.

22. In connection to TF # 076.2017 TAS Interaction Enhancements 05 11 17 ORI, what is the ideal dropdown if a Dead Air call came in and the call got disconnected then the CSR performed a callback twice but routed to voicemail. Since the CSR doesn't know the reason of the call, what is the closest reason to be selected from the interaction dropdown and what's the appropriate result for it?

Please submit to Training Clarifications.

23. According to data flowchart for Verizon 4G Data BYOP and Non PPE(Android-iPhone) NOT Calling From Handset, first step there is to check data balance and if the account is NOT throttled then perform the steps like "turn Wi-Fi off and data on" but what if the customer doesn't have the phone with them, are the CSR's allowed to skip some steps and make sure that the account is well provisioned in SUI or check the coverage knowing that "turning the Wi-Fi off and the data on" is not applicable since customer mentioned that they don't have the phone with them?

    The purpose of asking technical questions is to ensure that the customer has the phone in their possession. The Flowcharts are applicable whether customers are calling from the device or they are calling from an alternate line, but always when they have the phone available.

24. Based on Activation flowchart, a step there says "PIN Valid?" if yes then "request and apply promo code then offer auto refill" then process activation. Would it be a mark off if the CSR will offer the auto refill after adding the airtime pin on the account since the customer is using an airtime card or should we follow the flowchart exactly as designed?

    CSRs should follow the Flowchart exactly as designed.

25. Based on TF # 074.2017 Commonly Used 611611 Services 05 10 17 ORI, if the customer wanted to "ADD" minutes we provide the instructions to do the text helpline service but what if the account is "PAST DUE", would it still be applicable or this is only applicable for active accounts?

    This is only applicable for Active accounts. In addition, the pages where 611611 changes were implemented are the ones located in the TAS Training Manual Programming - page 9 (Redemption).

26. For Unable/unable flowchart, a disclaimer was placed there which say's "If the customer is calling from handset and no alternate number, make sure that TAS/Billing are provisioned. You may send OTA's from TAS/SUI, reset features and remove hotlines with the customer on the line" but what if while doing the provisioning the call got disconnected, would it fall under "AF 5: Advising the customer to troubleshoot the phone while calling from it and the call got disconnected" ?

    No, the CSR followed the instructions from the red disclaimer when the customer does not have an alternate line, but is calling from the phone. CSRs need to make sure TAS/Billing System are provisioned, analyze coverage, verify balance sequence are correct, send OTA's from TAS/SUI, reset features; besides removing hotlines. Therefore, if the call was disconnected because the CSR was following these steps in the system, no points will be

deducted. CSRs should always avoid instructing customers to press the Power/red/End key or any specific instruction that forces the customer to disconnect the call.

27. Based on the updated flowchart for Upgrade Active to New - New Branded, a step there says "process transaction" then "wait 1-3 minutes" then identify if active then "complete activation steps". If GSM/CDMA LTE, then "power cycle the phone", but what if the account is not yet active, can they skip the flow to check SUI and if the status is inactive transfer to port or should they perform the activation steps even if the new device is not yet Active in TAS?

    That's the purpose, to follow the Flowchart. CSRs need to wait 1-3 minutes. If the line is Active, they have to provide the Activation steps, however, for inactive accounts, after retrieving the status in SUI, they should transfer the call to Port/ CRT to troubleshoot.

28. In connection to question no. 11, since the flowchart for Upgrade Active to New - New Branded states that after asking security question, we need to identify if the new device is CDMA or GSM and if its GSM, we enter the SIM for the phone B. Would it be a mark off if the CSR includes the ESN as well?

    Please refer to the next step after validating the identity. CSRs need to enter the ESN in the correct field for the phone for GSM and CDMA phones.

29. For Phone Upgrade transaction, if the customer is calling from the new phone that they are transferring the phone number to. Do we need to ask for an alternate phone number? And if none, do we follow the Delayed Upgrade procedure too? File: 9129616043590000301

    Yes, please refer to the Flowchart instructions at the beginning of every phone upgrade transaction if the customer is calling from the phone. CSRs need to ask for an alternate number and call customers back. Either way, if they use the Delay Upgrade Option, they will need to ask for another line. In the example provided, the customer is calling from the new line, therefore, no troubleshooting can be performed.

30. What would be the correct interaction dropdown for dead air call?

    Please see # 22.

31. For technical calls and the customer does not have the phone with them, should the CSR immediately inform the customer to call us back once they have the phone handy or should the CSR follow the flow chart first for not calling from the handset and check the coverage, balance and signal bars etc. before informing the customer to call us back once they have the phone.

    CSRs should inform the customer to call back once they have the phone in their possession.

32. For TF # 074.2017 Commonly Used 611611 Services is the "ADD" option applicable for customer's calling to add minutes using a credit card? In addition, for BYOP option is this limited when checking the eligibility only?

    The “ADD” option is applicable when the customer is redeeming the airtime PIN itself.

33. For AT&T BYOP Data Troubleshooting Calling from Handset right after checking any degraded tower for maintenance the next step was to power cycle the device however; based in the flow chart it does not have any step to ask for an alternate phone number instead the instruction was to let the customer turn the phone off and back on and call us back if the problem continues. Should the CSR follow this process wherein this is an auto-fail behavior for not offering a call back to the customer or should the CSR ask for an alternate phone number even if it's not in the flow chart?

    Please submit to Training Clarifications.

34. TF # 039.2017 From TF # 167.2016 Phone Exchange Process 03 07 17 ORI, stipulates that if a Customer states the phone is physically damaged, such as a cracked screen or liquid damage. In these instances, customers may be eligible for Damaged Phone exchanges. If a CSR replaces a phone for a damaged phone and the issue is not narrowed down will the agent get an Auto Fail? See contact number 9129605988420000191 for reference

    Yes. Regarding this file #, the CSR did not follow the appropriate troubleshooting steps and picked a result that was not related to the phone’s situation. The CSR did not comply with the updated policies regarding the Phone Exchange Process outlined in TF # 039.2017 From TF # 167.2016 Phone Exchange Process 03 07 17.

35. In relation to TF # 039.2017 From TF # 167.2016 Phone Exchange Process 03 07 17 ORI, If the CSR selects the wrong ticket type for replacing the phone, Example the correct ticket type should be Warehouse/Out of Warranty Exchange but agent selected Warehouse/Physical Damage Exchange. Will the agent be marked off on Auto Fail or 5.0 Adheres to Correct Processes? See contact number 9129605988420000191 for reference.

    Please see #34.

36. For Auto Fail 2 Call avoidance • Remaining on the line unnecessarily or prolonging the call for no valid reason. Does this have to happen at any section of the call or at the last section only?

    Please send examples to be more specific. If the CSR remained on the line without assisting the customer, as they should normally do, and that forced the customer to disconnect the call or the call was disconnected, the call will be evaluated as an Auto Fail.

37. If a ST CRT agent receives a Net10 call (Activation, reactivation, redemption or any technical call) should the agent transfer the call to Net10 CRT or should it be a higher tier; Net10 ERD?

    Please submit to Training Clarifications.

38. For phone upgrade, both phones are active and the customer is calling on one of the handset with a number that needs to be deactivated to upgrade the other number. If the customer doesn't have an alternate number and the call gets disconnected is the agent allowed to callback on the other number that is active?

    Yes.

39. Customer has a defective I phone, can the CSR escalate the call to extension 3070 for further assistance? Refer to contact number 9129573700760000191

    Please submit to Training Clarifications.

40. For phone upgrade, should the agent ask security questions first before asking for an alternate phone number if the customer is calling from the handset? or is it the other way around, ask for an alternate phone number and call the customer on the alternate number then ask Security questions? see Contact number 9129572412880000191

    CSRs must follow the Flowchart accordingly and if the customer has an alternate number, they need to contact them on that number. However, if none is available, they can proceed and validate the customer's identity, as outlined on the document.

41. What should we select as Reason and Details in scenarios when a customer calls in to ask for the Account Number but did not mention about porting out?

    Please submit to Training Clarifications.

42. TF states: You are now required to create an interaction for each call, even instances when you need to create a ticket for further resolution.
    Will this include system generated tickets such as phone upgrade tickets?

    Yes, an Interaction needs to be created even if a Ticket has was created.

43. For GENERAL QUESTION calls like the scenarios listed below, what interaction dropdown should the agent select?
    Balance Inquiry/Service End Date

Coverage Inquiry
Asking For Account Number for Record Purposes
How to Block Phone Numbers

Please submit to Training Clarifications.

44. What interaction dropdown should an agent use for PUK/PIN/Phone Lock Code?

    Please submit to Training Clarifications.

45. Would it be accurate to select Call Completed for Unsuccessful calls and simply document it why it became unsuccessful?

    Yes, because the call was completed, but they need to document why it was unsuccessful/successful.

46. If a customer asks for confirmation about a confidential information such as: “What zip code was this phone activated, was it XXXXX?" The account has the same information customer mentioned. Should the agent ask for Security Questions before confirming this with the customer?

    If the customer already provided the information, there is no need to validate the identity since the CSR is just confirming what the customer said.

47. If a customer asks for confirmation about a confidential information such as: “What zip code was this phone activated, was it XXXXX?" The account has the same information customer mentioned. Should the agent ask for Security Questions before confirming this with the customer?

    Please see #46.

48. If a customer asks for confirmation about a confidential information such as: “What zip code was this phone activated, was it XXXXX?" The account has the same information customer mentioned. Should the agent ask for Security Questions before confirming this with the customer?

    Please see #46.

49. Please clarify the difference between the answer given on item 28 of the QA Questions on 04/19/2017 Calibration saying "when it comes to testing data connection, this is limited to Activations for GSM BYOP" from TF 015 Updated Welcome Call for Activations, Reactivations and Upgrades which says: "You must remain on the line with the customer until a test call can be done and data is working properly".

The information was stated that way because you can find those instruction on the same TF # 015.2017 From TF #071.2016 UPDATED Welcome Call for Activations, Reactivations and Upgrades 02 03 17. Remember that we should not disregard the instructions from that Training Flash.

> Once a MIN is assigned to the phone, have the customer power the phone off and on and attempt a test call (instruct them dial *22890 for non-LTE Verizon phones). For GSM BYOP phones, have the customer insert the SIM card and power cycle the phone. If the call is successful, you can end the call with the standard closing. For new activations of GSM BYOP SIM cards, if the test call is successful ask the customer to test their data connection by going to any webpage, like Google.com or Facebook.com. If the phone cannot connect to the internet, assist the customer in updating their phone's APN settings.

50. For scenarios where the customer specifically requested for the CSR to stay on the line for a specific time (5 mins) and CSR agreed, is the CSR still obliged to follow the situational script for 'what to do if customer places you on hold' on the 3rd minute?

They should inform customers they are only allowed to wait 3 minutes.

51. Customer suddenly went silent in line (no response), will the CSR be penalized for not following the situational script for 'what to do if customer places you on hold' if the agent will ask if customer is still in the line before 3 minutes or moments after the silence?

Yes.