



Release 1.0 Requirements

1	800 Number Consolidation
1.1	The following ten numbers from EDS, AFSA, and NCS will be consolidated for Release 1: 800 4 FED AID 800 621 3115 800 557 7392 800 848 0979 800 256 7346 (closed schools – * already consolidated) 800 801 0576 (FOTW – * already consolidated) 888 758 9729 800 726 5163 888 799 2474 888 758 9730.
1.2	All of the above consolidated numbers will point to the 800 4 FED AID number.
1.3	The discontinued numbers will continue to route customers to 800 4 FED AID until: - All calls to the discontinued numbers are less than an agreed upon percentage of the total calls - An agreed upon number of months have passed after the 800 number consolidation. Once the above conditions are met, the discontinued numbers will no longer route customers to the 800 4 FED AID number. Callers will hear a message with the new 800 4 FED AID number, and then will be automatically disconnected. The new number message will be played until the calls to the discontinued numbers are less than an agreed upon percentage. Once this number is less than the agreed upon percentage of calls, the old numbers will be disconnected permanently.
1.4	A sampling of approximately 10% of calls from pre-selected area codes will be routed to the Functional Routing Application over a complete business month. This will be a part of the phased-in deployment approach for testing the 800 number consolidation.
1.5	A baseline will be created to measure the success of the phased-in deployment approach. After specific metrics are met, a go-live date will be set.
2	Functional Routing Application Announcements and Functionality
2.1	Discreet or directed speech recognition will be available on the Functional Routing Application for rotary callers, so they will be able to speak responses.
2.2	A general FSA greeting will be played for all customers. Possible sample wording is as follows: “Thank you for calling the Federal Student Aid centers. Para Espanol, oprima el 2 ahora.” If no option is selected, the caller will automatically be routed to the English IVR after three seconds.
2.3	A general message about the upcoming number consolidation will be played for all customers after the go-live date. This message will not be played during the pilot phase. A male voice will be used to distinguish the new Functional Routing Application from the former one. This will signal to students that options have changed.
2.4	The new number message will be played for the caller if the 800 4 FED AID number is not dialed. The Dialed Number Identification Service (DNIS) will be captured and the message will be played twice, once with letters, then with numbers. Possible sample wording is as follows: “Please note that the number you called has changed. Please call 1-800-4-FED-AID to reach (call center) in the future. That number again is 1-800-433-3234.” It will also be provided in both English & Spanish menus.
2.5	The current order of announcements on the menu is as follows: 1. Greeting in English and Spanish.



2.6	Callers will not be allowed to “fast-track” through the announcements. No user input will be allowed in the system until after the Main Menu is reached.
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3 Functional Routing Application Main Menu Functions	
3.1	The following options from the Main Menu will be played for callers based on a single tiered menu: 1 – Application 2 – Consolidation 3 – Debt Collection 4 – Lender Identification 5 – All Others. These five choices on the Main menu are the most acceptable solution from a usability standpoint any additional options would push this to a two tiered menu.
3.2	If no/invalid options are selected, the menu will automatically repeat after 5 seconds. Invalid options include 0, 6, 7, 8, 9, or silence. Possible sample wording for the message is as follows: "Please select one of the following options so that your call may be routed correctly..." This message will be repeated one time.
3.3	If the caller presses the star (*) key, the menu will be repeated one additional time.
3.4	The same menu options and messages will be provided to the callers in the Spanish menu.
4 Operating Partner Equipment, Software, and Hardware Changes	
4.1	NCS/FSAIC will remove the English/Spanish option in their message board.
4.2	NCS/FSAIC will add a time/date check and routing for Spanish callers.
4.3	AFSA/LS will remove the English/Spanish option in their Welcome and IVR.
4.4	NCS/DCSIC will remove the English/Spanish option in their IVR.
4.5	NCS/DCSIC will add a time/date check and routing in their Spanish IVR.
4.6	EDS/LC will remove the English/Spanish option in their IVR.
4.7	EDS/LC will add a time/date check and routing in their Spanish IVR.
4.8	The EDS MCI ECR application and updated design for FSA will be incorporated into the main consolidated functional routing application menu.
4.9	An option must be added in the PBXs for CSRs to choose English/Spanish during warm transfers.
4.10	A time of day & date check must be added in PBXs for warm transfers.
4.11	CSRs must be provided with training and job aids containing each center's hours of operations & holiday schedule to be used during transfers.
4.12	CSRs must be given prioritization in the queue to eliminate additional handle time between AFSA, NCS, and EDS.
5 Call Flow Routing	
5.1	Information/application option (1) ENGLISH routes to FSAIC PBX message board.
5.2	Information/application option (1) SPANISH routes to FSAIC Spanish Queue.
5.3	Loan servicing (Borrower Services) option (2) ENGLISH routes to LS IVR.
5.4	Loan servicing (Borrower Services) option (2) SPANISH routes to LS Spanish CSR Queue.
5.5	Consolidation options (3) route to LC IVR or specialized CSR queue
5.6	Debt option (4) ENGLISH routes to DCSIC IVR.
5.7	Debt option (4) SPANISH routes to DCSIC IVR.
5.8	Lender Information option (5) ENGLISH routes to Borrower Tracking queue
5.9	Lender Information option (5) SPANISH routes to Borrower Tracking queue
5.10	Invalid entries consist of: zero/nine (0/9), no entry, and any numbers/symbols not listed as options in the menu.
5.11	If the caller does not enter a valid option on the Main Menu, the caller will be routed to the number that they originally dialed, for example, if a caller dials the Debt Collection Service Information Center (DCSIC) 800-621-3115, they will be routed to a DCSIC CSR.



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6	Call Handling
6.1	New warm transfers will be created so CSRs can transfer misdirected callers directly to the appropriate customer information center (CIC) queue.
6.2	CSRs will track warm transfers with a post call work code at NCS and through stroke paper tracking at AFSA and EDS. A job aid will be provided to assist CSRs in these warm transfers.
7	Communication
7.1	Update directory listings to advertise the 800 4 FEDAID number.
7.2	Update Operator Services with the 800 4 FEDAID number.
7.3	Update websites to reflect the 800 4 FEDAID number.
7.4	Update FSA and other government publications (e.g. IRS, Treasury) to reflect the 800 4 FEDAID number.
7.5	Update bills and statements to communicate the new number/options.
7.6	Communicate new number to state agencies.
7.7	Communicate new number to high schools, colleges, universities, and educational institutions.
7.8	Provide information/job-aids to CSRs regarding changes.
7.9	Update form letters from AFSA, EDS, and NCS to reflect 800 4 FED AID
7.10	Update miscellaneous literature related to FSA.
8	Reporting
8.1	Create an MCI report to track the DNIS and area code utilization
8.2	Track the no selection volumes in the functional routing application through iBasis reports
8.3	Monitor the TNT success rate with MCI ECR reporting capabilities
8.4	Monitor the network blockage at MCI into iBasis and call centers
8.5	Track the Service Levels at each call center through existing ACD reports
8.6	Monitor the Average Speed of Answer at each call center through existing ACD reports
8.7	Track the selections made at each point in the iBasis application
8.8	Track the misdirects caused by the routing with iBasis, MCI, and ACD analysis