

**Consistent Answers for Customers
R2 Requirements**

Process	Step	Functional Requirement	Application Requirement	Legacy Screen	Priority	Scope Status	Comments	Technical Comments	Type
2.1	Manually Assign Call to CSR								
	2.1.1	Check Voicemail for Messages							
	2.1.1.1	Ability to check voicemail for new messages							
		N/A							
	2.1.2	Log Contact Information							
	2.1.2.1	Ability to notate subject of voicemail and customer contact information into a log							
		System will provide the ability to notate and maintain a log.			Low				New
	2.1.3	Contact Customer							
	2.1.3.1	Ability to contact customer and provide external party contact information							
		System will provide a reference list of external party contact information			Low	KM			New
	2.1.4	New Inquiry							
	2.1.4.1	Ability to create a new inquiry							
		System will generate Call Status	Lotus Notes		High				
		System will generate Assigned To	Lotus Notes		High				

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2.1.5 Inquiry Information

2.1.5.1 Ability to enter inquiry information

System will generate Respond By Date	Lotus Notes	High		Read-Only (not read only in legacy system but will be in to-be application)		New
System will generate Date Opened	Lotus Notes	High		Read-Only		
System will generate an unique tracking number for the inquiry	Lotus Notes	High		Read-Only		
System will allow insert of Customer Last Name	Lotus Notes	High		Legacy system only has one field for customer name		New
System will allow insert of Customer First Name	Lotus Notes	High				New
System will allow insert of Institution	Lotus Notes	High				
System will allow insert of Customer Phone Number	Lotus Notes	High				
System will validate format of Customer Phone Number	Lotus Notes	High				
System will allow insert of Customer Fax Number	Lotus Notes	High				
System will allow insert of Customer Email Address	Lotus Notes	High				
System will allow insert of Questions / Issues	Lotus Notes	High				
System will allow insert of Program Area	Lotus Notes	High				

2.1.6 CSR Availability

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2.1.6.1	Ability to check Outlook Calendar and/or Rotation List for CSR availability						
	N/A						
2.1.7	Assign Inquiry						
2.1.7.1	Ability to assign an inquiry to a new CSR						
	System will allow update of Assigned To	Lotus Notes	High				
	System will save the inquiry	Lotus Notes	High				
2.1.8	Send Email						
2.1.8.1	Ability to send email with .wav attachment of voicemail to new CSR						
	System will allow .wav file of voicemail to be available to CSR		Low				New
2.1.9	Send Notification						
2.1.9.1	Ability to enable system to send a notification to the assigned CSR about the new inquiry						
	System will generate and send a notification to assigned CSR regarding new inquiry with the tracking number		High				
	System will generate and send a reminder to assigned CSR if inquiry is not closed within three days of Date Opened		High				
2.2	CSR Receives Call						
2.2.1	Open Inquiry Form						

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2.2.1.1 Ability to sort for inquiry based on given identifiers

System will list all inquiries in ascending order by Date Opened	Lotus Notes	High				
System will allow sort of inquiries by Assigned To	Lotus Notes	High				
System will allow sort of inquiries by Customer Last Name	Lotus Notes	High		Legacy system only has one field for customer name		New
System will allow sort of inquiries by Customer First Name	Lotus Notes	High				New
System will allow sort of inquiries by Date Opened	Lotus Notes	High		Read Only		
System will allow sort of inquiries by Status	Lotus Notes	High				
System will allow sort of inquiries by Institution	Lotus Notes	High				
System will allow sort of inquiries by Program Area	Lotus Notes	High				
System will allow sort of inquiries by Tracking Number	Lotus Notes	High				
2.2.1.2 Ability to search for inquiry based on given identifiers						
System will list all inquiries in ascending order by Date Opened		High				New
System will allow search for inquiries by Assigned To		High				New

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System will allow search for inquiries by Customer Last Name		High		Legacy system only has one field for customer name		New
System will allow search for inquiries by Customer First Name		High				New
System will allow search for inquiries by Date Opened		High		Read Only		New
System will allow search for inquiries by Status		High				New
System will allow search for inquiries by Institution		High				New
System will allow search for inquiries by Program Area		High				New
System will allow search for inquiries by Tracking Number		High				New
System will display Customer Last Name	Lotus Notes	High		Legacy system only has one field for customer name		New
System will display Customer First Name	Lotus Notes	High				New
System will display Customer Phone Number	Lotus Notes	High				
System will display Customer Email Address	Lotus Notes	High				
System will display Institution	Lotus Notes	High				

2.2.2 Contact Customer

2.2.2.1 Ability to contact customer

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2.2.3 Update Inquiry

2.2.3.1 Ability to update the fields in the inquiry

System will allow update of Customer Last Name	Lotus Notes	High		Legacy system only has one field for customer name		New
System will allow update of Customer First Name	Lotus Notes	High				New
System will allow update of Institution	Lotus Notes	High				
System will allow update of Customer Phone Number	Lotus Notes	High				
System will allow update of Customer Fax Number	Lotus Notes	High				
System will allow update of Customer Email Address	Lotus Notes	High				
System will allow update of Assigned To	Lotus Notes	High				
System will allow update of Questions / Issues	Lotus Notes	High				
System will allow update of Response / Action Taken	Lotus Notes	High				
System will allow update of Citation Number	Lotus Notes	Low		May not be used in R2		
System will allow update of Call History	Lotus Notes	High				
System will allow update of Program	Lotus Notes	High				
System will allow update of Respond By Date	Lotus Notes	High		Read-Only (not read only in legacy system but will be in to-be application)		New

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		System will allow a document to be attached to the inquiry	Lotus Notes	High			
2.2.3.2	Ability to save the inquiry						
		System will save updated inquiry information	Lotus Notes	High			
		System will add user/timestamp to updated inquiry	Lotus Notes	High			
2.2.4	Provide External Contact Information						
2.2.4.1	Ability to provide external party contact information with reference list						
		System will provide a reference list of external party contact information		Low	KM		New
2.2.5	New Inquiry						
2.2.5.1	Ability to generate a new inquiry						
		System will generate Call Status	Lotus Notes	High			
		System will generate Assigned To	Lotus Notes	High			
		System will generate Respond By Date	Lotus Notes	High		Read-Only (not read only in legacy system but will be in to-be application)	New
		System will generate Date Opened	Lotus Notes	High		Read-Only	
		System will generate an unique Tracking Number	Lotus Notes	High		Read-Only	

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2.2.6 Inquiry Information

2.2.6.1 Ability to enter inquiry information

System will allow insert of Customer Last Name	Lotus Notes	High		Legacy system only has one field for customer name		New
System will allow insert of Customer First Name	Lotus Notes	High				New
System will allow insert of Institution	Lotus Notes	High				
System will allow insert of Customer Phone Number	Lotus Notes	High				
System will allow insert of Customer Fax Number	Lotus Notes	High				
System will allow insert of Customer Email Address	Lotus Notes	High				
System will allow insert of Questions / Issues	Lotus Notes	High				
System will allow insert of Program Area	Lotus Notes	High				
2.3 Research Answer						
2.3.1 Identify Sources						
2.3.1.1 Ability to identify sources to conduct inquiry research						
System will provide a list of relevant policy documents		Low		KM		New
2.3.2 Conduct Research						

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2.3.2.1	Ability to conduct research using IFAP, Policy CD-ROM, Q/A Database, CSCC peers, and FSA websites						
	System will provide access to FSA related websites		Low		KM		New
	System will provide the structure to maintain a Q/A database		Low		KM		New
2.4	Internal SME Assists Call						
2.4.1	Refer to ISME List						
2.4.1.1	Ability to retrieve a list of internal resources						
	System will provide a list of internal resources based on policy areas		Low		KM		New
2.4.2	ISME Receives Inquiry Information						
2.4.2.1	Ability to "hand off" the inquiry information to the ISME						
	System will display Call Status	Lotus Notes	High				
	System will display Date Opened	Lotus Notes	High				
	System will display Tracking Number	Lotus Notes	High				
	System will display Customer Last Name	Lotus Notes	High		Legacy system only has one field for customer name		New
	System will display Customer First Name	Lotus Notes	High				New
	System will display Institution	Lotus Notes	High				

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		System will display Customer Phone Number	Lotus Notes	High			
		System will display Customer Fax Number	Lotus Notes	High			
		System will display Customer Email Address	Lotus Notes	High			
		System will display Assigned To	Lotus Notes	High			
		System will display Questions / Issues	Lotus Notes	High			
		System will display Response / Action Taken	Lotus Notes	High			
		System will display Citation Number	Lotus Notes	High		May not be used in R2	
		System will display Call History	Lotus Notes	High			
		System will display Program	Lotus Notes	High			
		System will display Respond By Date	Lotus Notes	High		Read-Only (not read only in legacy system but will be in to-be application)	
2.4.3	ISME Contacts CSR with Solution						
2.4.3.1	ISME will contact CSR with provided inquiry solution						
		N/A					
2.4.4	ISME Takes Ownership of Inquiry						
2.4.4.1	Ability to assign ownership of inquiry to ISME						

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		System will allow update of Assigned To	Lotus Notes	High			
2.4.5	Update Inquiry						
2.4.5.1	Ability to update the inquiry that the call was handed off to ISME						
		System will allow update of Assigned To	Lotus Notes	High			
		System will allow update of Response / Action Taken	Lotus Notes	High			
		System will allow update of Call History	Lotus Notes	High			
2.4.5.2	Ability to save the inquiry						
		System will save updated inquiry information	Lotus Notes	High			
		System will add user/timestamp to updated inquiry	Lotus Notes	High			
2.5	External SME Assists Call						
2.5.1	Determine ESME to Contact						
2.5.1.1	Ability to view a reference / specialist listing of external SMEs						
		System will provide a list of external resources based on policy areas		Low	KM		New
2.5.2	Provide Call Information to ESME						
2.5.2.1	Ability to give the inquiry information to ESME						

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		N/A					
2.5.3	Obtain Information from ESME						
2.5.3.1	ESME provides CSR with the solution to the inquiry						
		N/A					
2.5.4	Update Inquiry						
2.5.4.1	Ability to update the inquiry with new information from ESME						
	System will allow update of Assigned To	Lotus Notes	High				
	System will allow update of Response / Action Taken	Lotus Notes	High				
	System will allow update of Call History	Lotus Notes	High				
2.5.4.2	Ability to save the inquiry						
	System will save updated inquiry information	Lotus Notes	High				
	System will add user/timestamp to updated inquiry	Lotus Notes	High				
2.5.5	Hand Off Inquiry to ESME						
2.5.5.1	Ability to "hand off" the inquiry information to the ESME						
	N/A				Will this "hand off" include updating the owner in the Assigned To field to track the history of the inquiry?		

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2.5.6	Update Inquiry					
2.5.6.1	Ability to update the inquiry that call was handed off to ESME					
	System will allow update of Response / Action Taken	Lotus Notes	High			
	System will allow insert of Call History	Lotus Notes	High			
2.5.6.2	Ability to save the inquiry					
	System will save updated inquiry information	Lotus Notes	High			
	System will add user/timestamp to updated inquiry	Lotus Notes	High			
2.5.7	Mark Close					
2.5.7.1	Ability to Close the inquiry					
	System will allow update of Call Status to 'Closed'	Lotus Notes	High	Read-Only		
2.5.8	System Auto-Verification					
2.5.8.1	Ability to auto-verify inquiry by hitting the Close Call button					
	System will verify that all required fields have been populated	Lotus Notes	High			New
	System will spell check inquiry information	Lotus Notes	High	Need to confirm that Siebel 7.0 includes the ability to spell check the inquiry		
2.5.8.2	Ability to update the inquiry if it is incomplete					

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		System will allow correction / update of information that does not pass the verification process	Lotus Notes	High			
2.6	Provide Answer to Customer						
	2.6.1	Contact Customer					
		2.6.1.1	Ability to contact the customer via telephone				
			System will display Customer Last Name	Lotus Notes	High	Legacy system only has one field for customer name	New
			System will display Customer First Name	Lotus Notes	High		New
			System will display Customer Phone Number	Lotus Notes	High		
			System will display Institution	Lotus Notes	High		
		2.6.1.2	Ability to contact the customer via email				
			System will display Customer Last Name	Lotus Notes	High	Legacy system only has one field for customer name	New
			System will display Customer First Name	Lotus Notes	High		New
			System will display Customer Email Address	Lotus Notes	High		
			System will display Institution	Lotus Notes	High		
	2.6.2	Supply Answer					

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2.6.2.1	Ability to provide the customer with the proposed solution to the inquiry					
	System will display Response / Action Taken	Lotus Notes	High			
2.6.3	Update Inquiry					
2.6.3.1	Ability to update inquiry that solution was not satisfactory					
	System will allow update of Response / Action Taken	Lotus Notes	High			
	System will allow insert of Call History	Lotus Notes	High			
2.6.3.2	Ability to save the inquiry					
	System will save updated inquiry information	Lotus Notes	High			
	System will add user/timestamp to updated inquiry	Lotus Notes	High			
2.6.4	Collect More Information					
2.6.4.1	Ability to conduct further research					
	See Section 2.3		High			
2.6.5	Update Inquiry					
2.6.5.1	Ability to update inquiry that solution was satisfactory					
	System will allow update of Response / Action Taken	Lotus Notes	High			

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		System will allow insert of Call History	Lotus Notes	High			
	2.6.5.2	Ability to save the inquiry					
		System will save updated inquiry information	Lotus Notes	High			
		System will add user/timestamp to updated inquiry	Lotus Notes	High			
2.7	Close Call						
	2.7.1	Make Customer Aware of Additional Services					
	2.2.7.1	Ability to provide the customer with a list of additional CSCC Services					
		System will provide a list of additional resources and services		Low		KM	New
	2.7.2	Update Inquiry					
	2.7.2.1	Ability to update the inquiry that Additional Services Message was given to customer					
		System will allow update of Response / Action Taken	Lotus Notes	High			
		System will allow insert of Call History	Lotus Notes	High			
	2.7.2.2	Ability to save the inquiry					
		System will save updated inquiry information	Lotus Notes	High			

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		System will add user/timestamp to updated inquiry	Lotus Notes	High			
2.7.3	Manually Verify Inquiry Information						
2.7.3.1	Ability to verify that all inquiry information is correct						
		N/A					
2.7.3.2	Ability to update the inquiry						
		System will allow update of Customer Last Name	Lotus Notes	High	Legacy system only has one field for customer name		New
		System will allow update of Customer First Name	Lotus Notes	High			New
		System will allow update of Institution	Lotus Notes	High			
		System will allow update of Customer Phone Number	Lotus Notes	High			
		System will allow update of Customer Fax Number	Lotus Notes	High			
		System will allow update of Customer Email Address	Lotus Notes	High			
		System will allow update of Questions / Issues	Lotus Notes	High			
		System will allow update of Program Area	Lotus Notes	High			
2.7.4	Mark Close						
2.7.4.1	Ability to Close the inquiry						

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2.7.5 System Auto-Verification

2.7.5.1 Ability to auto-verify inquiry by hitting the Close Call button

2.7.5.2 Ability to update the inquiry if it is incomplete

System will allow update of Call Status to 'Closed'	Lotus Notes	High				
System will verify that all required fields have been populated	Lotus Notes	High				New
System will spell check inquiry information	Lotus Notes	High		Need to confirm that Siebel 7.0 includes the ability to spell check the inquiry		
System will save updated inquiry information	Lotus Notes	High				
System will add user/timestamp to updated inquiry	Lotus Notes	High				
System will allow correction / update of information that does not pass the verification process	Lotus Notes	High				