

OSOS BUSINESS RULES AND DEFINITIONS REFERENCE GUIDE

INTERACTIVE VOICE RESPONSE (IVR) PROCEDURES

The AOSOS Interactive Voice Response (IVR) functionality allows you to select pre-defined IVR scripts, which will generate automatic phone calls to selected customers.

This function is used to remind customers of scheduled training sessions, testing appointments, to update their current work status and the need for additional services, etc.

AOSOS IVR business rules:

1. Calls will be made to the customers between 9:00 a.m.-8:00 p.m.
2. If there is no answer the IVR will re-call up to five times every day for three consecutive days including weekends.
3. Calls are processed once an hour on the quarter hour, it can take up to two hours before an initial call will start depending on how busy the IVR queue is. Please see example below:

If an IVR is done for a customer at 8:20 a.m., at 9:15 a.m. the call will be sent to the queue for processing and the customer will receive the call between 9:30-10:15.

Available scripts

Appointment Reminder - Reminder message to customer about an interview or appointment at the local office.

Example: *Hello. This is a recorded message from the (office name). We are calling to remind you that you have an interview or appointment at the (office name) tomorrow or on our next business day, if tomorrow happens to be a holiday or weekend. Please remember to show up a few minutes before your scheduled time. If you are unable to come, please call us at (staff phone number), so that another person can be scheduled.*

Call Service Representative – This message asks the customer to call a service representative at the local office.

Example: *Hello. This is a recorded message from the (office name). Please call our service representative at (staff phone number) as soon as possible.*

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Test Reminder - Reminder message to customer that they have an appointment for a test at the local office.

Example: *Hello. This is a recorded message from the (office name). We are calling to remind you that you have an appointment for a test at the (office name) tomorrow or on our next business day, if tomorrow happens to be a holiday or weekend. Please remember to show up a few minutes before your scheduled time. If you are unable to come, please call us at (staff phone number), so that another person can be scheduled.*

Training Opportunity - Message to customer that there is a training opportunity that they may be interested in.

Example: *Hello. This is a recorded message from the (office name). We are calling to advise you that there is a training opportunity that you may be interested in. If interested, please come to the (office name) or call us at (staff phone number).*

Veteran Call - Message to Veteran to contact the local office for a service.

Example: *Hello. This is a recorded message from the (office name). As a veteran that has registered at the (office name), we request that you contact this office at (staff phone number) for a possible service. Please ask to speak to the Veterans' representative.*

Work Status/Need for Additional Services - Message to customer to determine current work status and the need for additional services.

Example: *Hello. This is a recorded message from the (office name). We are calling to determine your work status and need for additional services. Please call the (office name) at (staff phone number) as soon as possible. Thank You.*

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Available Broadcast/Announcement Scripts

Broadcast scripts are created to announce an event such as Employer Recruitment or a Job Fair. This requires a special recorded message to be done and requires two weeks notice to WISS (Ed Seely or Susie Giurlani). *NOTE: Until recorded, there is no message. Please do not select until informed to do so.*

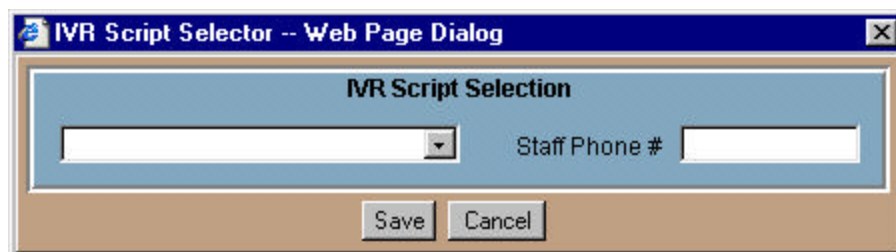
Employer Recruitment Announcement - Message to customer announcing a specific date and time for an employer recruitment.

Job Fair Announcement - Message to customer announcing the date and time of a job fair.

Job Search Workshop Announcement - Message to customer announcing the date and time of a Job Search Workshop.

To initiate an IVR transaction for a customer:

1. Perform a customer search
2. Confirm that the customer has a phone number
3. Click on the “**IVR**” button found at the bottom of the Customer Detail window and the IVR Script Selector pop-up window would appear.



4. Select the script that you want, enter your telephone number and click “**Save**” and the call will be generated. If the staff phone number is left blank, the phone number given is your local office phone number. *Note: If using your office phone number be sure to advise staff in your office how to answer the phone call.*

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To initiate an IVR transaction for multiple customers:

1. Perform a customer search
2. To select multiple customers
 - A. To select *sequential* group of customers
 1. Click and highlight the first record in the desired group.
 2. Hold down the “**Shift**” key, and click on the last record in the desired group. All records in the selected range will be highlighted.
 - B. To select *non-sequential* group of customers
 1. Hold down the “**Alt**” key, and click to highlight each record in the desired group.
 - C. To select *all* customers
 1. Click on the “**Select All**” button. All list entries will be come highlighted to indicate all are selected.
3. Click on the “**IVR**” button found at the bottom of the Customer Detail window and the IVR Script Selector pop-up window would appear.
4. Select the script that you want, enter your telephone number and click “**Save**” and the calls will be generated. If the staff phone number is left blank, the phone number given is your local office phone number. *Note: If using your office phone number be sure to advise staff in your office how to answer the phone call.*

Using Your Lists:

To initiate an IVR transaction from the LIST SEARCH function for multiple customers:

1. Click on the “**List Search**” tab from the Customer Search menu
2. The list management window features two groups of radio buttons below the list box, which allows you to define which customer lists will be displayed. You must select

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a single radio button from each group of options. Select a radio button from each group.

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The leftmost group of radio buttons includes:

Show Only My Lists
Show Lists in My Area Office
Show All Office Lists

The rightmost group of radio buttons includes:

Show Statewide Lists
Show Individual Lists
Show Both

3. Click on the “**Lookup List**” button.
4. Select the desired list and click “**Search**” and the selected list will be displayed.
5. Choose the customer or customers you wish to send an IVR call to and click “**IVR**”.
6. Select the script that you want, enter your telephone number and click “**Save**” and the calls will be generated. If the staff phone number is left blank, the phone number given is your local office phone number. *Note: If using your office phone number be sure to advise staff in your office how to answer the phone call*

Caution: Please note that 3 customer broadcast/announcement scripts titled (1) Job Fair Call (2) Employer Recruitment call and (3) Job Readiness Workshop Call are blank at this time and should not be used. If you use them, the customer will receive a phone call with no message other than it is a call from your office. This could lead to disappointed and possibly angry customers!

When you wish to use one of those three (3) broadcast/announcement message scripts, you will need to contact WISS staff and provide them with the verbiage so that it can be recorded for use. Please allow two weeks notice for this to be accomplished.

Initiating IVR from Matched Customers

The IVR scripts from the Job Order Module under the **Match** tab have pre-defined scripts that are associated with the job order description and the customers skills. The scripts will also supply the customer(s) with the job Order number and the phone number of the office that

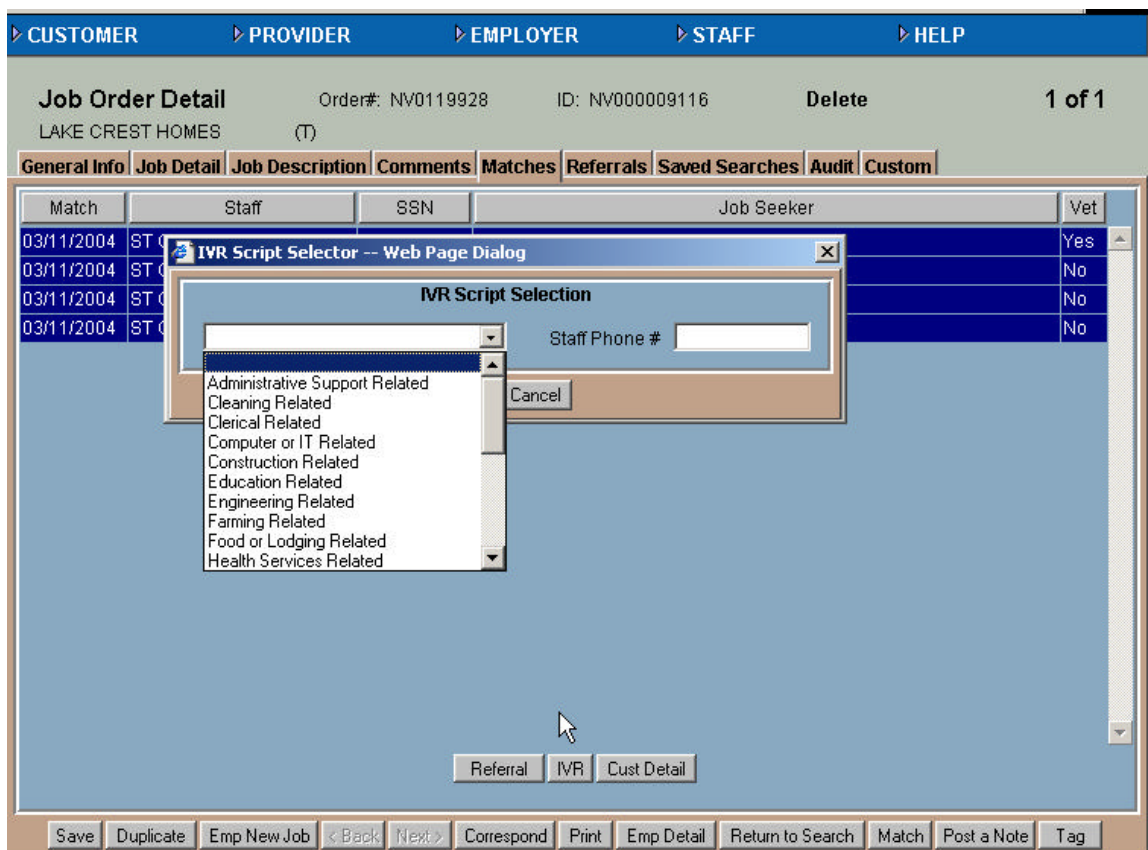
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performed the IVR transaction.

Note: The information that IVR has been completed can be found on the Activities page of the customer's detail record.

Initiating an IVR transaction for one or more matched customers .

1. From the list of matched customers on the **Job Order Match** tab highlight the customer(s).
2. Click the **“IVR”** button at the bottom of Match tab. The IVR Script Selector pop-up window will appear.
3. Select one of the IVR Scripts from the drop down list of the pop-up.
4. Enter the staff phone number, including the area code, in “Staff Phone” field. If no phone number is entered, the default will be the office phone number of the staff person who is logged on.
5. Click **“Save”** to send IVR or **“Cancel”** to stop the IVR call or return to Match tab.



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The following Scripts are available from the drop down list:

Scripts

Description
Administrative Support Related
Cleaning Related
Clerical Related
Computer or IT Related
Construction Related
Education Related
Engineering Related
Farming Related
Food or Lodging Related
Health Services Related
Job That Matches Your Work History
Legal or Compliance Related
Maintenance/Repair Related
Management Related
Material Moving Related
Media or Arts Related
Personal Services Related
Physical Science Related
Production or Manufacturing Related
Protective Services Related
Sales Related
Social Services Related
Sports and Recreation Related