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Request from: Office of Education, Outreach, and Enforcement

Question:

(CUSTOMER SERVICE) Provide a written flowchart of the Company's automated or IVR system detailing all the options and/or paths that are offered to customers. Specifically indicate when customers are routed to third-party and/or credit and collections vendors for calls.

Response:

Eversource IVR System Flow

1. **Welcome Message**
    - "Hi, Welcome to Eversource."
2. **Language Selection**
    - "For Spanish, press 9."
3. **Disclaimer**
    - "This call may be recorded."
4. **Main Menu Options**
    - **Self-Service Natural Language Elicit Intent -** "I am the new Eversource virtual assistant. How may I help you?"
    - **IVR intent options that a customer can say:**
        - **Pay My Bill/Make a Payment**
        - **Account Balance**
        - **Report an Outage**
        - **Gas emergency**
        - **Report a Payment**
        - **Budget Billing Program**
        - **Payment Plan**
        - **Stop Service**
        - **Update Phone/Mailing Address**
        - **Copy of their Bill**
        - **Fuel Assistance**
        - **Hardship Pre-Qualification (CT Residential customers)**

- **Bill inquiry**
- **New Service**

5. **Make a Payment Path:**
    - Identify/authenticate the customer account **(identify if account is in arrearage or not)**.
    - Inform customer of recent payment history and account balance.
    - Determine payment method:
        - Checking account, Savings account, or by credit card.
            - Credit card payments are transferred externally to a 3rd party credit card payment vendor over Toll-Free Number routing.
        - Confirm amount the customer would like to pay.
    - If payment process fails or customer intent requires additional assistance, the call will be routed to a CSR during normal business hours Monday – Friday 8:00am – 6:00pm. **(If customer account is identified in arrears, the call will be routed to an external CSR for assistance). If a customer does not authenticate successfully, they will route to the appropriate customer service representative based on phone number dialed.**

6. **Account Balance:**
    - Identify/authenticate the customer account **(identify if the account is in arrearage or not).**
    - Inform customer of recent payment history and account balance.
    - If customer intent requires additional assistance, the call will be routed to a CSR during normal business hours Monday – Friday 8:00am – 6:00pm. **(If customer account is identified in arrears, the call will be routed to an external CSR for assistance) If a customer does not authenticate successfully, they will route to the appropriate customer service representative based on phone number dialed.**

7. **Report an Outage:**
    - Identify/authenticate the customer account.
    - Utility service = Gas, route customer to a CSR to report Outage.

8. **Gas Emergency:**
    - Transfer to a CSR to report Gas leak/Odor calls.

9. **Budget Billing Program:**
    - Identify/authenticate the customer account **(identify if account is in arrearage or not)**.
    - Inform customer of recent payment history and account balance.

- Validate if the identified customer amount is eligible for Budget Billing Program.
  - If yes, customer is offered Budget Billing Amount over 12-month period.
    - Check if account has a current balance due, send to Make a payment flow.
  - If no, process enrollment in Budget Billing Program
- If Budget Billing Program process fails or customer intent requires additional assistance, the call will be routed to a CSR during normal business hours Monday – Friday 8:00am – 6:00pm. **(If customer account is identified in arrears, the call will be routed to an external CSR for assistance) If a customer does not authenticate successfully, they will route to the appropriate customer service representative based on phone number dialed.**

10. Payment Plan:

- Identify/authenticate the customer account **(identify if account is in arrearage or not)**.
- Customer call will be routed to a CSR during normal business hours Monday – Friday 8:00am – 6:00pm. **(If customer account is identified in arrears, the call will be routed to an external CSR for assistance) If a customer does not authenticate successfully, they will route to the appropriate customer service representative based on phone number dialed.**

11. Stop Service:

- Identify/authenticate the customer account **(identify if account is in arrearage or not)**.
- Validate if service at location is active or already been closed.
- If service still active.
  - Identify/confirm service address location.
  - Get/confirm date of service to be terminated.
  - Get Billing address.
  - Create Stop Service move out order.
- If Stop service process fails or customer intent requires additional assistance, the call will be routed to a CSR during normal business hours Monday – Friday 8:00am – 6:00pm. **(If customer account is identified in arrears, the call will be routed to an external CSR for assistance) If a customer does not authenticate successfully, they will route to the appropriate customer service representative based on phone number dialed.**

12. **New Service or Transfer Service:**

- Validate if customer intent is New/Transfer Service

- If yes, follow Stop service/Move out in the IVR flow, once stop service transaction is completed, transfer call to a CSR to assist with new service/Move In order.
- If no, transfer to a CSR to assist with start New Service/Move In order.

- If Stop service process fails or customer intent requires additional assistance, the call will be routed to a CSR during normal business hours Monday – Friday 8:00am – 6:00pm. **(If customer account is identified in arrears, the call will be routed to an external CSR for assistance) If a customer does not authenticate successfully, they will route to the appropriate customer service representative based on phone number dialed.**

13. Update Phone/Mailing Address:

- Identify/authenticate the customer account **(identify if account is in arrearage or not)**.
- Ask customer what the new phone number that will be associated with the account (Home phone, Mobile or work phone number).
- Ask customer if they would like to add a second phone number that will be associated with the account (Home phone, Mobile or work phone number).
- For update Mailing Address, the IVR identifies current billing address associated to the account and request new mailing address (house number, street address, City, zip code)
- If Update Phone/Mailing Address process fails or customer intent requires additional assistance, the call will be routed to a CSR during normal business hours Monday – Friday 8:00am – 6:00pm. **(If customer account is identified in arrears, the call will be routed to an external CSR for assistance) If a customer does not authenticate successfully, they will route to the appropriate customer service representative based on phone number dialed.**

14. Bill Copy

- Identify/authenticate the customer account **(identify if account is in arrearage or not)**.
- Inform customer of recent payment history and account balance (including if account is enrolled in Budget Billing Program).
- Process Bill Copy correspondence.
- If Bill Copy process fails or customer intent requires additional assistance, the call will be routed to a CSR during normal business hours Monday – Friday 8:00am – 6:00pm. **(If customer account is identified in arrears, the call will be routed to an external CSR for assistance) If a customer does not authenticate successfully, they will route to the appropriate customer service representative based on phone number dialed.**

15. **Fuel Assistance**

- Inform customer Energy assistance is designed to help offset winter heating bills for qualifying income eligible households.
- To locate an agency near you, please say or enter your 5-digit zip code.
- Provide contact information based on 5-digit-zip code for Fuel Assistance organization.
- If Fuel Assistance process fails/No match of zip code or customer intent requires additional assistance, the call will be routed to a CSR during normal business hours Monday – Friday 8:00am – 6:00pm. **(If customer account is identified in arrears, the call will be routed to an external CSR for assistance) If a customer does not authenticate successfully, they will route to the appropriate customer service representative based on phone number dialed.**

16. **Other Inquiries**

- Caller requests to speak to a Representative.
  - Attempt to gather customers intent, IVR can assist by saying "make a payment, cancel or stop service, my power is out, and more".
  - Customer requests to speak to a Representative. The IVR will attempt to identify the customer via phone number associated with the account or 11-digit account number.
- If customer intent requires additional assistance, the call will be routed to a CSR during normal business hours Monday – Friday 8:00am – 6:00pm. **(If customer account is identified in arrears, the call will be routed to an external CSR for assistance) If a customer does not authenticate successfully, they will route to the appropriate customer service representative based on phone number dialed.**

17. **Hardship Pre-Qualification menu:**

- If a caller is identified with an account in Arrears and requires speaking with a representative, The caller will be presented with the Hardship Pre-qualification menu prior to call being routed to an **external CSR for assistance.**

18. **End Call Transaction:**

- Self-Service transactions will be completed in the IVR.
- If a customer is not authenticated/identified successfully and requires speaking with a representative, they will route to the appropriate customer service representative based on phone number dialed.