TurboTax ✓

Intuit TurboTax Smartlook - Video Support
Inbound Customer Service & Software Tech Support

Earn up to $17.00 per hour ($8.50 per interval) with STAR Incentives!

Service Revenue
$16.00 per hour*
($8.00 per interval)

Hourly rate shown assumes the servicing of two, 30-minute intervals.

WOW! Enroll early and qualify for $500 in Servicing Incentives!
Must meet 100% of outlined servicing requirements
Please see page 7 for all incentive details

Service Revenue

Class Schedule*
Phase I
12/28/2020

Phase II**
12/29/2020 - 1/22/2021

Class Times Offered*
Monday – Friday
9:00 a.m. – 1:00 p.m. ET
10:00 a.m. – 2:00 p.m. ET
1:30 p.m. – 5:30 p.m. ET
4:00 p.m. – 8:00 p.m. ET
6:00 p.m. – 10:00 p.m. ET

Certification

Select ONE class time to attend throughout both course phases

Intervals Available*
01/01/21 – 04/30/21
Sunday - Saturday
8:00 a.m. – 12:00 a.m. ET

04/16/21 – 04/30/21
Monday - Friday
8:00 a.m. – 8:00 p.m. ET

Special Servicing Requirements
8 intervals required on Saturdays or Sundays or a combination of both
6 intervals required on Mondays

Peak Week Requirements
40 Intervals week of January 31st - Feb 6th
40 intervals week of Feb 7th – Feb 13th
40 Intervals week of April 4th – April 10th

Servicing Times Available

Most Intervals Available*
Monday - Friday
11:00 a.m. ET – 8:00 p.m. ET

Peak Day Requirements
04/14/21 – 8 intervals
04/15/21 – 10 intervals
04/16/21 - 6 intervals

Subject to change based on client needs

TurboTax ✓

## Intuit TurboTax Smartlook - Video Support

About the Client | Intuit Inc.

See First-Hand What A Call Is Like Watch Now!

Intuit Inc. is an enterprise software company that develops financial and tax preparation software and related services for small businesses, accountants and individuals.

TurboTax is a tax preparation software package and is one of the most popular income tax preparation software packages in North America. The software is designed to guide users through their tax returns step-by-step.
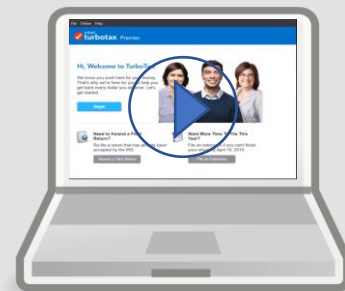
For more information about Intuit TurboTax review the client's website https://turbotax.intuit.com/

System and Equipment Standards
Click Here for System & Equipment Policy

Additional equipment required. If you previously serviced the TurboTax program please use chat pack previously provided. If not, one will be sent to you.

Chat Pack includes:

- Logitech C170 Webcam
- Webaround Banner Round Ocean Blue

Agents must also have:
- Noise Cancelling Headset
- i5 (or equivalent), i7 recommended
- Win 8.1 (64bit) accepted, Win 10 (64bit) recommended & preferred
- Current OS patches (last 15 days)
- Anti-malware solution with current definitions (15 days)
- Active firewall
- Global Protect 5.0.2

TurboTax

Intuit TurboTax Smartlook - Video Support
What to Expect When Servicing

What to Expect

- Inbound phone and video customer service/technical support. Handle technical support questions via phone, with video capability.

- Research, analyze and determine an appropriate course of action for TurboTax customers.

- Interact with customers via phone focusing on software navigation questions as well as assisting customer with locating prior years' returns and amendments.

- Serve as ambassador for the Intuit brand; take a caring and empathetic approach to customer interactions and/or escalation to a higher level of expertise.

- Document all issues, resolution and follow up action.

See First-Hand What A Call Is Like Watch Now!
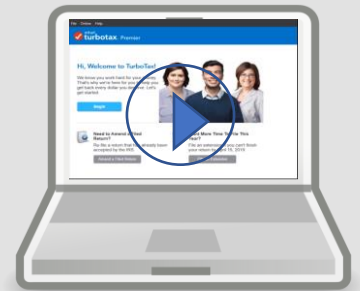
Capabilities of Top Performing Service Partners for this Program

- Outstanding problem-solving skills

- Displays patience, empathy, an ability to manage stress, the ability to work under pressure

- Skilled and efficient in writing and verbal communication

- Outstanding listening skills

- Provides knowledgeable, friendly and eloquent customer service

- Understanding how to navigate and efficiently use tools

Intuit TurboTax Smartlook - Video Support
CERTIFICATION DETAILS

"Log-in Party"

This Phase:

Provides an opportunity for agents to learn how to log-in to all systems and troubleshoot any challenges prior to the start of class

Instructor-Led Learning & Self-paced Learning Modules!

This Phase:

- Requires strong attention to detail, lengthy periods of intense concentration, and a great deal of learner involvement and class participation

- Consists of three weeks: Four hours of instructor-led content per day and up to two hours of self-paced content

Intuit TurboTax Smartlook - Video Support
CERTIFICATION DETAILS

Certification Completion Criteria

- 100% completion of all self-paced work on a daily basis

- 90% or greater on commitment adherence quiz

- 90% or greater on final assessments

- All learners must complete the Service Partner Security Awareness self-paced course and score 85% or higher on the assessment <u>before</u> the last day of class in order to be certified

**PLEASE NOTE – FOR SECURITY PURPOSES
LEARNERS MUST ATTEND THE FIRST THREE DAYS OF CLASS TO CONFIRM LOGIN CODES.**

Codes will be deactivated for learners who do not attend the first three days, and they will be removed from class. Please ensure your agents attend. Failure to take and/or complete any assessment may result in a drop from the course without reimbursement.

TurboTax ✓

SECURITY VERIFICATION ON THE ARISE PLATFORM

THIS OPPORTUNITY REQUIRES A BACKGROUND CHECK AND AFFIDAVIT OF IDENTIFICATION

You will be prompted to complete a background check during the enrollment process. Details on the type of background check and the requirements to pass it will be provided as you proceed through enrollment on the Arise® Portal.

The background check will be required to be completed either before or after payment for the course is made - depending on the client program.

- Service Partners who do not pass the background check will receive a refund of the certification course fee, minus a processing fee, the amount of which will be displayed on the Enrollment screen (on the portal) prior to before payment is made.
  - If a course is paid for with a voucher, a voucher will be re-issued, minus a processing fee.
- Refunds will not be provided if the background check is not completed in a timely manner.

IMPORTANT INFORMATION REGARDING BACKGROUND CHECKS

Please note if you have frozen your credit, you will have to temporarily lift the credit freeze with Experian. You do not need to lift the freeze at the other credit bureaus. Please lift the freeze for a minimum of 10 days. You will need to wait at least 24 hours before attempting the background check.

If you have recently changed your name, it may delay or disrupt the background check. Please make sure that full and correct legal name is included in your profile and provided in the background check step. Also, please ensure that Experian is aware of your name change.

Arise uses First Advantage to compete the background checks. Under certain circumstances, First Advantage may reach out to you to clarify your information. Your prompt response to First Advantage will accelerate the process of completing your background check and enrollment.

AFFIDAVIT OF ID

Notarized Affidavit of ID
A completed Affidavit of Identification with photo ID must be on file.

- This step can be skipped If you have already submitted a valid Affidavit of ID on a previous opportunity
- Click on the link to access the Affidavit of Identification: Affidavit of Identification
- Once completed, submit this form to: AriseAffidavitOfIdentification@arise.com. When submitting the form, the Subject line must include the Client Program name and the CSP ID

Please note:
- Arise will not process system access codes, required to attend the certification course, until ALL enrollment pre-requisites have been successfully completed and provided to Arise.
- If the learner is removed or dropped from the opportunity for failure to complete all steps, no refunds will be provided.

STAR metrics requirements vary and are subject to change.

Star metrics and corresponding Incentives are included in the Production SOW. Certification SOW does not include Star.

Metric	*	**	***
CA	> 90%	> 90%	> 90%
Intervals Serviced	< 80	81 – 119	> 120
Net Promoter Score (NPS)	$\geq$ 60	$\geq$ 60	$\geq$ 60
Incentive	No incentive amount	$0.25	$0.50

Revenue Incentives

Qualify for a total of $500 in Servicing Incentives!

Service Partners can earn a total of $500 in servicing incentives for each agent that certifies and meets the special servicing requirements and peak service requirements as outlined below and Service Level Requirements in the SOW.

$200 (included in the second invoice of February 2021)

- 8 intervals required on Saturdays or Sundays or a combination of both
- 6 intervals required on Mondays
- 40 Intervals week of January 31st - February 6th
- 40 intervals week of February 7th – February 13th

$300 (included in the first invoice of May 2021)

- 8 intervals required on Saturdays or Sundays or a combination of both
- 6 intervals required on Mondays
- 40 Intervals week of April 4th – April 10th
- 8 intervals on 04/14/21, 10 intervals on 04/15/21 and 6 intervals on 04/16/21

TurboTax ✓

Service level requirements vary and are subject to change

Failure to meet one or more of the service level requirements may result in termination of the SOW. The service level requirements may be modified from time to time upon commercially reasonable notice to the business.

Service Level Requirements		Metrics Definition
Commitment Adherence	90%	% of intervals serviced compared to the intervals scheduled and committed to service. Commitment Adherence is calculated as [Serviced Minutes/(posted Minutes + Released Lockdown Minutes)] x 100
Average Handle Time (AHT)	10 – 12 minutes	Talk time + Hold Time
Quality	90%	Adherence to the client's QA guidelines (reviewed during certification course).
Net Promoter Score (NPS)	> 65	The Net Promoter Score is an index ranging from -100 to 100 that measures the willingness of customers to recommend the client's products or services to others. It is used as a proxy for gauging the customer's overall satisfaction with the client's product or service and the customer's loyalty to the brand. It is typically gauged through a survey administered after a call.
Transfer Rate	> 10%	Percentage of calls that have to be transferred in order to complete.
Documentation Rate	> 95%	The rate by which the agent is notating caller-related details and steps to issue resolution in client systems.

TurboTax ✓

Log-in codes are confidential, user specific and will only be generated for confirmed course attendee

All business's must ensure that their agents have a professional work environment, free from any background noise, when in class and when servicing.

- To confirm a business' intent to attend, Arise may be contacting agent registered to attend the certification course a minimum of 10 business days prior to the start of class.

- Failure to confirm your company's intent to attend will result in a delay of codes and may result in either removal from the course or placement into an alternate course. Please make every effort to provide a timely response.

- Commitment Adherence is critical to this program. Companies are responsible for ensuring that their agents service all intervals that have been accepted in StarMatic®.

[See Sample Statement of Work](#)

Service Partner DOES NOT QUALIFY to participate in this program if any of the following applies to the company or their agent enrolling in the opportunity:

- Has one or more SOW terminations on file due to performance.

- Has dropped from "enrolled" status in a program opportunity less than 4 weeks before expressing interest in this program opportunity.

- Is currently enrolled in or contracted on another Intuit program.

- If the agent services any Intuit product for any other company with which Intuit is contracted.

- Has a Commitment Adherence rating below 90%.

DISCLAIMER

This Opportunity Announcement (OA) is intended as a summary of the applicable business opportunity. It is not a legal document, nor a comprehensive review of all terms included in the applicable Statement of Work (SOW).

You should thoroughly review each SOW prior to executing it. In the event of a conflict between the OA and the SOW, the terms of the SOW will take precedence. Arise recommends a thorough review of all policies prior to enrolling in the certification course.