



**Financial Services Company**  
Inbound Customer Support



## Service Revenue

**Service Revenue**  
**\$11.00 per hour\***  
\$5.50 per interval

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



## Certification

### Class Schedule

Phase I – Instructor-Led & Live Call-Taking  
02/22/2021 – 03/03/2021

Phase II - Earn While You Learn!  
03/04/2021 – 03/05/2021

*Please see page 5 for details on class times for the first 2 days of Phase II*

### Class Times Offered

9:00 a.m. – 1:00 p.m. ET

2:00 p.m. – 6:00 p.m. ET



## Servicing Times Available

### Intervals Available\*

7:00 a.m. - 12:00 a.m. ET  
7 days a week

### Special Servicing Requirements\*

2 intervals (1 hour) required on Sunday and/or Saturday or a combination of both

6 intervals (3 hours) required on Monday and/or Tuesday or a combination of both

*\*Subject to change based on client need*





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## About the Client | Financial Service Company (FIS)

Fidelity Information Services, LLC (FIS) Financial Services Company

FIS lifts economies and communities by advancing the way the world pays, banks and invests.

FIS provides single-load (gift, corporate gift, incentive, mall and rebate) and reloadable products (general purpose, benefits, government disbursement, healthcare, incentive, payroll, remittance, teen/family and travel).





## Financial Services Company Inbound Customer Support

### System and Equipment

#### Equipment Must Meet Platform Standards

[Click Here for System & Equipment Policy](#)

#### Additional Client Program Technology Standards

- Required – at least one monitor 19” or larger
- Suggested Dual monitors 17 – 19” LCD monitors in non-widescreen or 19 – 20” in widescreen format.
- VOIP
- Macs cannot be used to service this program
- Servicing computer MUST have an ethernet port. Adapters are not permitted.

**Arise Secure Desktop (ASD)** The Arise Secure Desktop (ASD) flash drive is a device necessary to successfully access the Arise Platform in order to service a client program.

The ASD is an additional operating system on a computer which provides a secure and streamlined environment. It does not interact with an existing windows operating system. It is launched from a USB flash drive and does not install on a computer. Once the ASD is removed, no trace of it is left on the PC.

- Agents will need to provide or purchase their own flash drive to download the ASD onto, and instructions will be emailed to the enrolled agent on how to download the ASD software to that flash drive.
- Upon enrollment in a certification course for a client program, make sure to keep an eye out for an email with instructions on how to create the ASD.

#### Arise Secure Desktop (ASD) Purchase Suggestions\*

Amazon [SanDisk Ultra CZ48 32GB USB 3.0 Flash Drive](#) \$8.99

Best Buy [PNY - Elite Turbo Attache 4 32GB USB 3.0](#) \$12.99

Walgreens [Infinitive USB Flash Drive 16GB](#) \$16.99



\* This list of equipment does not constitute an endorsement or recommendation by Arise but is provided for informational use and your convenience. It is your responsibility to decide what equipment you would like to use and which retailer from which to purchase such equipment. Arise disclaims all liability to any person in respect of anything done or omitted to be done wholly or in part in reliance on the information contained herein.





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### **What to Expect**

**At this time, this opportunity is scheduled to last approximately 5 months, with the possibility of extending to 9 months or beyond – depending on client need. Please rest assured that we are working hard to make this a regular program and will provide updates as they become available.**

#### **On a daily basis for the FIS Client Program Service Partners:**

- Provide customer service via phone regarding prepaid card solutions; Handle customer inquiries and resolve basic support issues such as balance and transaction inquiries, card activations and delivery inquiries
- Receive inbound customer service/financial customer service calls
- Update customer information and ensure accurate entry of contact information
- Troubleshoot customer problems, identify and solve root cause of problems
- Track and document inbound support needs
- Provide consistent, high quality professional interactions while meeting program quality guidelines



### **Capabilities of Top Performing Service Partners for this Program**

- Displays patience, empathy, an ability to manage stress and the ability to work under pressure
- Skilled and efficient in writing and verbal communication
- Provides knowledgeable, friendly and eloquent customer service
- Outstanding problem-solving skills - application of soft skills





## **Financial Services Company** Inbound Customer Support

**Instructor-Led &  
Self-Paced Work**  
**Earn While You Learn!**

### **In this phase:**

Agents will learn about the client, how to navigate systems, and how to use these tools to resolve customer inquiries.

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

4 hours Instructor-Led & 2 hours Self-Paced content per day

**Certification Live**  
**Call-Taking**  
**Earn While You Learn!**

### **In this phase:**

- Agents must score an average of 95% on 3 quality evaluations
- 100% completion of Corp RegU compliance courses

On 01/22/21 and 01/25/21, there will be 2 hours of call-taking where Service Partners can start earning service revenue!

During the Certification SOW, Service Partners are required to service a minimum of 30 intervals (15 hours) per week during times posted in Starmatic and as outlined in the SOW. Please review the Certification SOW for additional information, including the end date.

**See Page 1 For Class Dates and Times**

100% attendance in instructor-led sessions is highly encouraged for success!





## **Financial Services Company** Inbound Customer Support

### **Certification Completion Criteria**

- 100% class attendance
- 100% completion of all regulatory courses required by FIS, including courses required during Instructor-Led class time and courses required during first 5 days of call-taking
- Successfully pass any assessments (85% or higher)
- Score an average of 95% on 3 Quality Assurance evaluations during first 5 days of call-taking
- Successfully handle calls during certification call-taking periods in classroom
- All learners must complete the Service Partner Security Awareness self-paced course and score 85% or higher on the assessment before the last day of class in order to be certified

Read complete course policies [here](#)





# OPPORTUNITY ANNOUNCEMENT



## **THIS OPPORTUNITY REQUIRES A BACKGROUND CHECK AND AFFIDAVIT OF IDENTIFICATION**

### **A background check will be prompted once you start the enrollment process**

- Because of the nature of this program, the required background check is extensive and includes a 10-year criminal search, a search of the sex offender registry and a global sanctions check.
- Client program restrictions prevent agents who have not completed this background check from starting class. Due to certain courthouse closures during the COVID-19 pandemic, Arise may be unable to completely finalize your background check before the start of class if you don't initiate it immediately.
- If a Service Partner does not pass the background check, the certification course fee will be refunded, minus a processing fee which will be displayed/visible 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.
- A credit freeze will delay the process. The credit freeze should be temporarily lifted for a minimum of 10 days in order for the third-party vendor to process your background check.

### **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 the Experian is aware of your name change.**

**Arise uses First Advantage to complete 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.**

### **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 listed above, no refunds will be provided.

## **AFFIDAVIT OF ID**

- 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](mailto:AriseAffidavitOfIdentification@arise.com)
  - Please make sure to include User ID/CSP ID in the subject line, along with the name of the client program you are enrolling in.





## 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 (CA)	90%	% of intervals serviced compared to the intervals scheduled and committed to service. Commitment Adherence is calculated as: $\left[ \frac{\text{Serviced Minutes} + \text{Excused No Show Minutes}}{\text{Selected Minutes} + \text{Released Lockdown Minutes}} \right] \times 100$
Average Handle Time (AHT)	360 seconds (6 minutes)	The average length of a call, includes Talk Time, Hold Time and ACW Time.
Quality Score	95%	% of evaluated calls receiving a Quality score that meets service level requirement or higher / total calls evaluated







## **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 company's intent to attend, Arise may be contacting the business owner or their 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. Businesses are responsible for ensuring that their agents service all intervals that have been accepted in StarMatic®.

[See Sample Statement of Work](#)

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

**A business DOES NOT QUALIFY to participate in this program if any of the following applies to the business or their agent enrolling in the opportunity:**

- Was the designated agent under 1 or more Statements Of Work that was terminated for cause
- Has dropped from "enrolled" status in a program opportunity less than 4 weeks before expressing interest in this program opportunity.
- Has a Commitment Adherence below 90%
- Had SOW terminated for cause in the last 180 days currently located on the Proxy Server report.
- Is enrolled in or contracted on the FIS Claims program

### **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.

