



ATSI 24/7 Call Center Site Certification Criteria Spec for User Group PIN

Gold Star (includes **starred items)

General Business Practices

Licenses/Memberships

1. Valid business license, if required by state or local government.
2. Basic Business and Workmen's Compensation Insurance.
3. **Errors and Omissions Insurance.

Life Safety

1. Site should comply with local building codes: No obvious violations like doors too narrow, ceiling too low, exits, or stairway not clear.
2. Fire Extinguishers: Site must have fire extinguishers located within visual distance of every fire exit, not to exceed requirements of any local authority having jurisdiction.
3. Low voltage backup lights/exit signs clearly illuminating emergency routes and all fire exits.
4. Evacuation plan and diagram posted, to include location of fire extinguishers, pull stations and route arrows.
5. Fire Protection: Must have smoke detection (photo electric type suggested or be part of a certificated alarm) along paths of egress that can be heard in the operations room or anywhere an operator is required to be.
6. Carbon Monoxide detectors present in operations room.

Operations

Equipment

1. Working redundant hard drives, for customer and operational data, on an ATSI certified and approved platform. Server Redundancy: Working redundant hard drives in mirror or raid on all servers holding customer and operational data. This can include virtualized systems.
2. Unattended remote access support on all supported systems for vendor support. Ex: Logmein Rescue, Gotoassist etc. Direct, POTS style, telephone line not routed thru the internal TAS switch w/number prominently displayed.
 - a. Internet access
3. Secure computer room, key or electronic access.
4. A minimum support contract from the certified vendor. "Customer Support Agreement."
5. System spares kit, recommended by the certified vendor, appropriate to the platform. (Spares kit to include any part needed to keep the system processing calls at a minimum). For physical servers and/or phone systems without redundancy (ex: live synchronized backup server or virtualization systems - VMware or Hyper-V) a spares kit, recommended by the certified

vendor, appropriate to the platform is required. (Spares kit to include any part needed to keep the system processing calls at a minimum) "Essential spares" (spare parts kit) to get telephony working & replacement cards for messaging side.**Spare removable media drive.

6. **Alternate Plan for rerouting calls if spares kit does not include incoming telephony electronics.
7. **Voice Logger (where allowed by law).

System Maintenance

1. Maintenance Schedule:
 - a. To contain the schedule for preventative maintenance as recommended by Professional Teledata.
 - b. Maintenance duties clearly assigned and a place to sign off as they are completed.
2. Current set of system manuals.
3. Proper certified vendor support telephone number and clients' identification number affixed to cabinet.
4. **ATSI approved and certified maintenance contract from the certified vendor. "Customer Support Agreement," same as above (OR) **Dedicated internal maintenance provider approved by the Certified Examiner and Certified by ATSI.

Back-ups

1. At least three complete set of backup media. Two sets to be stored on site, the other set stored off site. Each backup media will be checked for validity only (in being properly formatted and written) on site. The backup media should contain full operational programs and all permanent, client specific, information. The date of the backup should be clearly marked on the backup media, and each should be numbered. Backups should be at least done on a bi-weekly system rotating thru three sets of backup media.
2. ## A preferred method would be a separate server based backup solution (not on the main virtualization) that creates automatic rotating backups both on-site and off-site. (ex: Datto)
3. Latest copy of maintenance report to be kept in maintenance logbook if recommended by the certified vendor, Professional Teledata. System Monitoring~ Maintenance Reporting Option set to Send Email Notification to PTD and local contact
4. Complete set of certified vendors' current system software, including boot media. (Boots from hard disk drive; can be booted from floppy) Must have floppy or external boot media.
5. Current (within 30 days) complete set of client information and programming. (OR) Keep a file of this information stored on a print capture computer separate from the TAS system. (Can backup messages and account information to separate computer; from there it can backed up to diskette, CD, or Zip disk.)
6. Current hard copy of all data necessary to keep the Certified platform taking and processing calls.

Emergency Procedures

1. Logbook or Cloud-based CRM to contain:
 - a. Current software and/or firmware levels of all systems and subsystems, including date of last upgrade.

- b. Contact names and numbers for Professional Teledata, applicable phone companies, and other vendors, including relevant account numbers and any circuit IDs.
 - c. Contact names and numbers of site maintenance and key personnel.
 - d. History of system maintenance.
 - e. Service history to include previous system troubles, the cause, and what fixed the problem. (Equipment and software BETA sites do not need to include BETA issues reported to programmers.)
 - f. Current hard copy of call distribution programming (if applicable), [This is not applicable since the call distribution is completely contained in the operator and account programming.] System and Port Configuration.
 - g. Flow chart of procedures for restarting any and all applicable TAS systems and subsystems.
 - h. Location of System Spares Kit.
 - i. Location of all sets of back-up media.
 - j. Location of system software media.
 - k. Location of configuration printouts.
 - l. Location of all system manuals.
 - m. Location of current printed or stored system and client information.
2. System connected to UPS w/capacity to run switch and two workstations for a minimum of two hours. NOTE: Hot or switch controlled standby electric generator power is an acceptable substitute as long as there is no interruption of service longer than 2 minutes.
 3. On-site generator or have access to a generator capable of being on line within half the run time available by the UPS. NOTE: The name and telephone number of a vendor who can supply the site with a standby generator should be located in the log book in the event the site does not own a manual generator.
 4. If switchover to generator is not automatic, site shall have posted procedures to include:
 - a. The location of proper extension cords to power UPS if required.
 - b. Procedure if a power down of the system/switch would be necessary to run off of a generator.
 5. Cellular phone available on premises (hands free capability recommended.)
 6. Computer tool kit to include Philips and flat head screwdrivers, needle nose pliers or nut drivers (small & medium size) and a flashlight.
 7. Work light available in equipment area.
 8. Server Room temperature monitoring with audible or electronic notification.
 9. **Paper call taking system in place in the event of an extended loss of the client data from the system. This shall include message slips and/or color coding, filing, and paging with either Internet access or alpha mate on site for alpha paging. Client information should be available from secondary system, either paper based or on a different computer system.

Personnel

Hiring Policies

1. Written hiring procedures. These procedures are not set by ATSI, but should comply with all local and federal laws. ATSI recommends that these guidelines be developed with appropriate legal counsel. Should include: Standardized application, interview questions, and test scoring levels.

Training and Continuing Education Programs

1. The ATSI Operator Training CDs (OR) ATSI CSR Certification program (OR) Approved Pinnacle Written Training/Testing System. Certified vendor provided Management or On Site training. (OR) Certified vendor provided technical training. At least one employee of the site is to have a certificate of completion in either of these classes.
2. Attend at least one Certified User Group or ATSI Conference per year.
3. Attend at least one ATSI Conference every three years.
4. **Supervisor Training Program or one ATSI 24/7 Certified Supervisor.
5. **System management training AND technical training certified by the Certified vendor. (Training available at Professional Teledata customized to user needs.) Professional Teledata training for operation and client management (at least one employee or manager) AND Professional Teledata training for technical and hardware/software support issues (at least one employee or manager).

Employee Evaluation Guidelines

1. Timetable for evaluations.
2. Written criteria for evaluations.

Any requirement not allowed by local or state ordinance shall be waived.

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