

## **Creating an Account**

***Thank you for calling the CSAT helpdesk. My name is \_\_\_\_\_. How may I help you?***

(listen for response and make note of the issue)

***May I have your name and contact number?***

(Response) ***Thank you.***

(Make a note of this information and perform an “all search” to locate an existing account. This information is also needed in the instance the call is dropped).

***Have you contacted the helpdesk before?***

(Response) ***Thank you.***

***I will be happy to assist you with that information. In order to best serve you, I need to gather some additional information to proceed.***

***\*\* (If they have previously contacted the helpdesk) Do you have a registration number or case number?***

(Response) ***Thank you.***

***May I please have the name of the company you are registering?***

(Response) ***Thank you.***

***What is your contact email address?***

(Response) ***Thank you.***

***What is your fax number?***

(Response) ***Thank you.***

***What is your company's website?***

***What is the physical address for the facility?***

(After all this information is gathered do a full read back to ensure all information was entered correctly.)

***Mr./Mrs. \_\_\_\_\_, I just want to confirm the information I have entered for you is correct. I am showing the facility you will be registering is \_\_\_\_\_ located at \_\_\_\_\_ with a phone number of \_\_\_\_\_, fax number of \_\_\_\_\_ and the website is \_\_\_\_\_. I have your name as \_\_\_\_\_ and your email address as \_\_\_\_\_. Is that information correct?***

(if has a registration id) I also show you have been assigned registration id number \_\_\_\_\_.

(If yes, click the save icon. If no, modify what needs to be changed.)

If the caller has created a ticket with ORNL, a case SHOULD NOT be created. Add a note to the account and send an email to [csat@ornl.gov](mailto:csat@ornl.gov) using the approved User Management template.

If the caller has NOT created a ticket with ORNL, a case needs to be created.

## **Creating a Case**

***“I just need to add in some additional information. Please have a pen and paper ready for your case number.”***

(complete the case information and save)

***“Mr./Mrs \_\_\_\_\_, are you the preparer, submitter, or authorizer for this facility?”***

(response)

***“Thank you.”***

(Enter the subject and description information, focusing on the core of the situation. Read back the information.)

“To reconfirm the issue/question is regarding \_\_\_\_\_. Is that correct?”

(check the FAQs to see if the resolution to the FAQ is available. If not, determine if the call needs to be escalated to Tier II or via email to ORNL).

Log the case status as open, closed, escalated (Tier II, team lead, supervisor, or ORNL).

Enter the solution details

**\*\*READ THE APPLICABLE FAQ VERBATIM\*\***

RESOLUTION

***“Mr./Ms. \_\_\_\_\_, your case number is \_\_\_\_\_. Is there anything else I can help you with?”***

(response)

***“Thank you for calling the CSAT helpdesk. Have a good day”***

ESCALATION

***“Mr./Ms. \_\_\_\_\_, I am escalating this situation to \_\_\_\_\_. Your case number is \_\_\_\_\_. Is there anything else I can help you with?”***

***“Thank you for calling the CSAT helpdesk. Have a good day”***