

# Appointment Process Document

**Revision No. : 1.0**

**Issue Date : September 2020**

**Issued By : NBI**

## Table of Contents

Document Overview.....	3
Amendment Record.....	3
<b>8 Appointments.....</b>	<b>4</b>
8.1 Appointment Information.....	4
8.2 Appointment Process.....	4
8.2.1 Query Appointments.....	5
8.2.2 Reserve Appointment Slot.....	6
8.3 Appointment Process Flows.....	7
8.4 Appointment Contact Details.....	7
8.5 Appointment for Survey.....	8
8.6 Appointment for Civil Works.....	8
8.7 NBI ConnectCo.....	8
8.8 Appointment Rescheduling.....	9
8.9 Local Arrangement.....	9

## Document Overview

### Amendment Record

Revision No.	Changes	Author	Date
1.0	<p>Final version. Updates include:</p> <ul style="list-style-type: none"> <li>• General updates and revisions</li> <li>• Added content to Appointment Process (section 8.2) including new sections 8.2.1 and 8.2.2</li> <li>• Removed Delayed Activation process</li> <li>• Added Appointment Process Flows (section 8.3)</li> <li>• Added Appointment Contact Details (section 8.4)</li> <li>• Added Appointment for Civil Works (section 8.6)</li> <li>• Added NBI ConnectCo (section 8.7)</li> <li>• Added Local Arrangement (section 8.9)</li> </ul>	Product Management	September 2020

## 8 Appointments

---

This section details the scheduling and management of appointments for the End User in relation to service delivery/provisioning and repair/assurance.

### 8.1 Appointment Information

The NBI appointment functionality allows Service Providers to query appointment slots and subsequently reserve a single appointment slot.

Appointments are supported for a number of activities including:

- End User Connections (Installations)
- End User Transfers with In-Home Services
- Activations with In-Home Services
- Product Changes (where ONT changes are required)
- In-Home Services
- Survey Requests

The following Appointment slots are offered (depending on the Drop Type or work required):

- AM (Morning) 08:00-12:00
- PM (Afternoon) 12:00-1600
- EV (Evening) 16:00-20:00\*
- AD (All Day) 08:00-20:00\*\*

\*EV appointments are only offered during Apr – Sep months.

\*\*Typically, an AD appointment will start in the AM slot but continue into the PM slot. Depending on the duration of the work involved, the majority of AD appointments will be no longer than 2 slots (i.e. <8hrs).

Some orders may not require a site visit (e.g. ceases, transfers, and re-activations). In these cases, the service request is actioned immediately, therefore the Service Provider should schedule these based upon their own provisioning timelines and CPE dispatch. If the End User requests In-Home Services on a transfer or activation, then an appointment may be required depending on the type of In-Home Service being ordered.

### 8.2 Appointment Process

To schedule an appointment, the Service Provider must follow a 3-step process:

- 1) Query: query for available slots at given location, date range & activities
- 2) Reserve Appointment: reserve appointment for the agreed window (~20 minutes)\*
- 3) Place Order: place service order within 20 minutes, which triggers Appointment Confirmation

Note: The same appointment process is used to reschedule appointments.

\*The appointment slot is reserved for 20 minutes. If the appointment slot is no longer available/valid when the Service Provider submits the service order, then, depending on the Service Provider setup, the next available appointment slot will be used or the order will be rejected. See section 8.2.2 for more details.

### 8.2.1 Query Appointments

A Service Provider can query available appointment slots within a given date range. The date range is optional, and if not used, the appointment will be returned from the next working day.

An appointment query should be run after the eligibility check and the products have been chosen, to determine if a slot is available or alternatively show a list of appointment slots that are currently available. The desired appointment slot is reserved by the Service Provider and is consequently used in order submission.

An appointment will be required for service installation work at the End User premises, where there are two types of appointment scheduling available to the Service Provider:

- Specifying a “date range” with a “start date” (and “end date” if desired) and selecting an appointment slot
- Requesting the next available appointment and selecting an appointment slot

#### 8.2.1.2 Creating Query Appointment Request

When creating an appointment request, the following information is required:

- Service Location (Eircode or Location Code)
- Date Range (Start and End Date) – optional
- Slot Job Type (Connection, In-Home, Transfer, Survey, Existing)
  - Existing Appointment (When populated, NBI will validate the existing appointment referenced can support the installation requirements). This is used in an update appointment scenario.

Note: The following Job Types can also be specified on the request:

- Connection (A flag to indicate whether the appointment is required for a new connection or a reconnection of an available line)
- Transfer (A flag indicating whether the ONT needs to be changed as part of the transfer request)
- Migration (Used where a change of product requires a premises appointment, for example an ONT needs to be changed when the End User changes from one product family to another)
- Survey (Service e.g. FTTH, and Survey Category e.g. “Standard” or “End User”)
- In Home (A flag indicating whether the technician may provide additional predefined services as part of the install, as agreed with the Service Provider. The In-Home Products (e.g. IHS101, IHS102) and Quantity are also requested here.
- CPE (The Product Code for the CPE to be provided by the technician. The relevant values will be defined as part of the In-Home Services Offer and returned in the Eligibility response.

#### 8.2.1.3 Query Appointment Response

The following Appointment Slot information is returned in the response:

- Duration (The anticipated duration of the job in minutes, based on activity list provided)
- Long Appointment (A true / false flag indicating whether the job schedule requires an appointment slot greater than 4 hours duration, and is classified as an “All Day” Appointment)
- Multi-Stage Appointment (A true / false flag indicating the activities requested require a multi-stage Customer Appointment in order to complete the process)
- Available Slots (Lists the available appointment slots, within the specified date range meeting the criteria specified)
  - Date (e.g. 2020-09-21)
  - Slot (AM, PM, EV, AD)
  - Availability (High, Medium, Low)
- Existing Match (A true / false flag providing confirmation whether an existing appointment can support the revised job details, or a new appointment slot will be required. Only populated if Existing Appointment was used in case of modifying an in-flight order)

A full list of details that can be returned in the query appointments response are shown in the figure below:

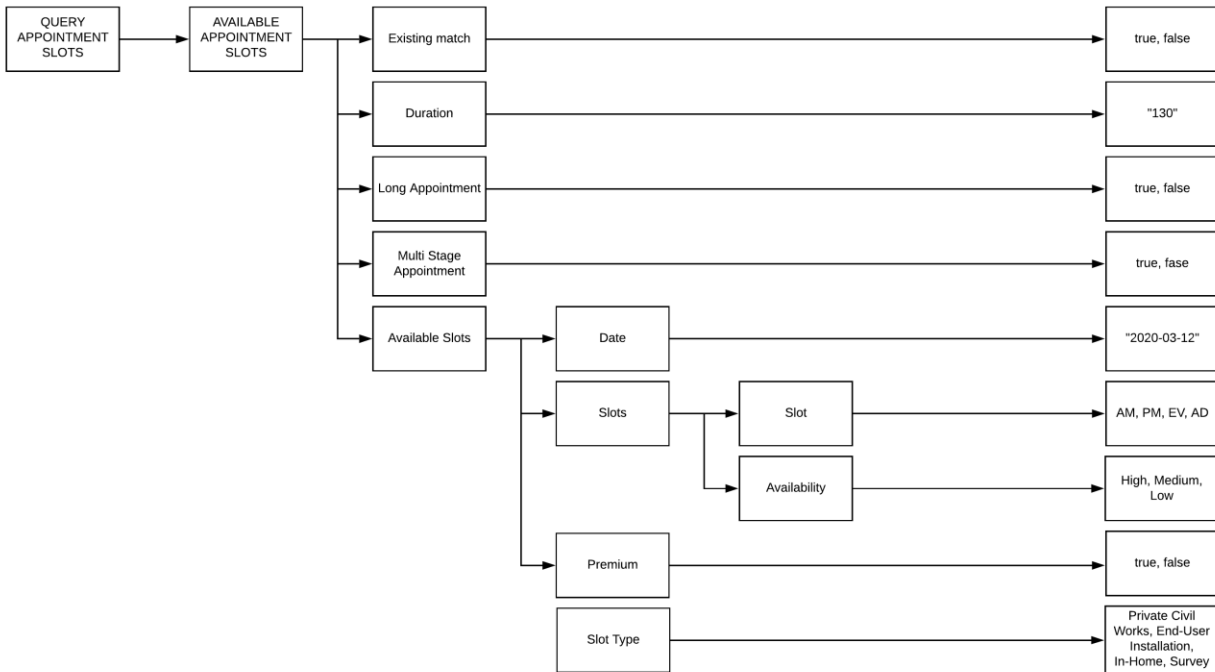


Figure 1: Query Appointment Slot Results

## 8.2.2 Reserve Appointment Slot

Once the available appointments have been returned, the desired appointment can be requested in the reserve appointment function.

### 8.2.2.1 Reserve Appointment Request

When reserving an appointment on the NBI system, the exact appointment details are now required, as well as same Service Location. The following details are required:

- Service Location (Eircode or Location Code)
- Requested Slot
  - Date
  - Slot
  - Type
  - Next Available\*
- Job Type
- Contact Details

\*Service Providers, when using the Appointment API, will be able to set a 'Next Available' flag for appointment booking scenarios. If the requested slot is unavailable at time of submitting order;

- If flag is set to "True" – the next available slot will be booked
- If flag is set to "False" – the order will reject with an appropriate error message

Note: This flag is defaulted to "True".

Note: Service Providers using the web portal will automatically be provided with the next available appointment in this scenario.

Note: If the order is placed >24 hours after the appointment reservation, the order will be rejected as the reserved appointment will no longer be available.

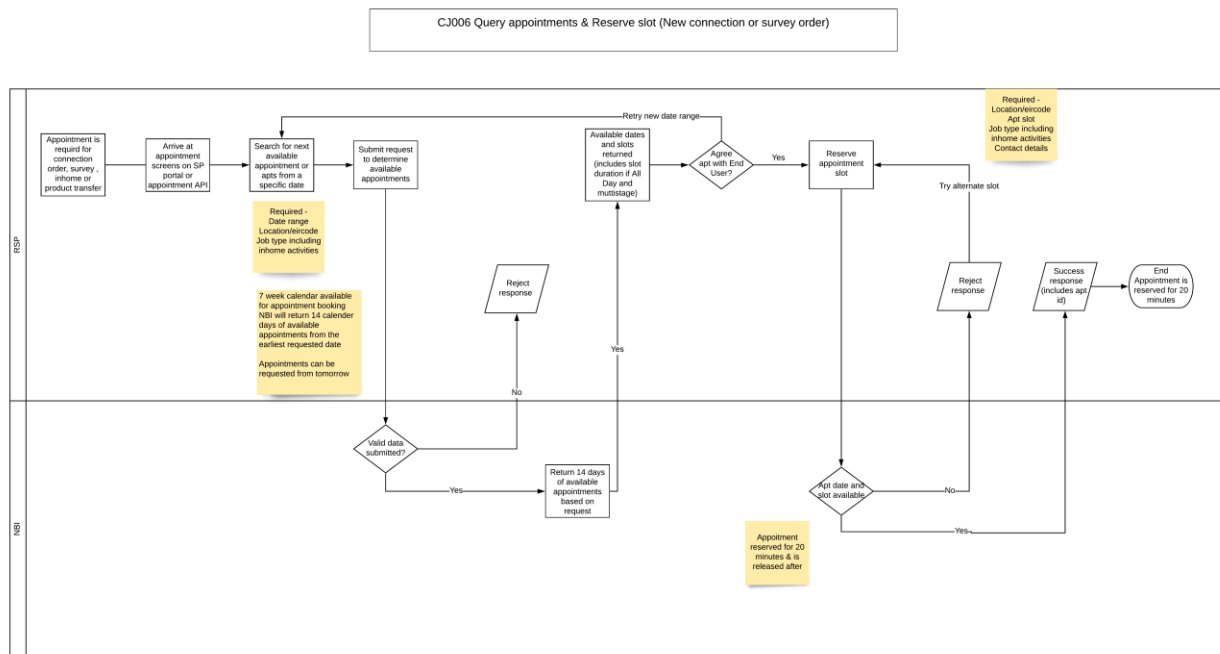
### 8.2.2.2 Reserve Appointment Response

The following Appointment Slot information is returned in the response:

- Reserved Appointment Slot
  - Date
  - Slot
  - Duration
  - Type
  - Long Appointment
  - Requested Match
- Expiry (The date and time the appointment reservation will expire and be released by NBI)

Service Providers will be notified in the response if the appointment slot is different to the original requested appointment slot.

## 8.3 Appointment Process Flows



## 8.4 Appointment Contact Details

End User contact details will be required to manage an appointment. The following information is required to be captured in order to facilitate an appointment:

### 1. Contact Name

Only one contact name will be captured here. If the Service Provider / End User wants to specify additional contact information then they have the option to capture text in the appointment notes field e.g. this can be used if the contact number is different to the contact name

### 2. Contact/Phone Numbers

One of the following phone numbers is required, at a minimum, to book an appointment:

1. Irish Mobile

2. UK Mobile
3. Other Number

The Mobile number prefixes will be validated by NBI. There will be no validation on the 'Other Number' field to support landlines, international numbers, etc.

There will also be an ability to capture free text for an appointment which could be used to assist with the delivery e.g. "please call after 7pm" or "door bell doesn't work", etc.

## 8.5 Appointment for Survey

When the eligibility check returns a "Survey Required" result on a premises, then a Survey must be performed before service can be ordered at the premises.

A survey requires an End User appointment, and the appointments process must be used.

## 8.6 Appointment for Civil Works

When booking an appointment that requires Civils work, slots will be returned to the Service Provider as follows:

- a) Public Civils
  - Installation appointment can be booked from Day 15.
- b) Private Civils
  - Private Civils appointment can be booked from Day 3-10.
- c) Both Public and Private Civils
  - Private Civils appointment can be booked from Day 11-14.
  - NBI will endeavour to complete public and private on the same day. If they need to, they can reschedule the private civils appointment to an earlier slot if the end user agrees.

In all examples above, the calendar starts the day after the day the appointment is being booked.

The above applies to initial appointments being booked by a Service Provider or a reschedule appointment request by the Service Provider.

In the case where civils work is required for a pre-order, NBI will attempt to complete all public and/or private civils work in advance of RFS date.

Note: The installation can only be scheduled from RFS onwards.

It is permitted to consider moving a private civils appointment to earlier via local arrangement (RELA). However, installation appointments should not be moved to an earlier slot via local arrangement unless ConnectCo are carrying CPE as part of the install, or if they have confirmed with the End User that the equipment has arrived on site.

## 8.7 NBI ConnectCo

When an order is with NBI ConnectCo management, the following process applies:

- 1) NBI ConnectCo will call the End User in advance of the appointment to confirm if can go ahead as scheduled. At this point, if required, the End User can reschedule or request to cancel the order.



- 2) NBI ConnectCo texts the End User the day before scheduled appointment (no response needed from the End User)
- 3) Engineer calls the End User in advance, at that point the End User can reschedule or request to cancel if required.
- 4) When NBI have ownership of the appointment, it is locked for change by the Service Provider, however, the order may still be cancelled if required but a late cancellation charge may apply.
- 5) NBI ConnectCo may contact the End User prior to change of ownership to arrange or change an appointment – particularly in case of when civils work is required.

## 8.8 Appointment Rescheduling

There are 2 main categories of Appointment Rescheduling:

- 1) Service Provider led Rescheduling
- 2) Issue driven Rescheduling

Service Provider led rescheduling is where the Service Provider may reschedule the appointment up to the Change of Ownership status on the order. This may be because the End User needs to change the appointment for whatever reason, or where the Service Provider has other services (e.g. TV) to be installed which might require rescheduling of the appointment.

Issue-driven rescheduling is where the order/appointment cannot be delivered and NBI will issue a Reason Code detailing why the appointment needs to be rescheduled. Full Reason Codes to be detailed in the Appendix.

An order which is required to be rescheduled by the Service Provider will be notified via an RESP (Reschedule Service Provider) notification. When the Service Provider receives this notification, the order is required to be Rescheduled or cancelled within 21 calendar days. If this time period elapses, then NBI will issue an RTC (Request to Cancel) notification. If the Service Provider does not reschedule or cancel the order within an additional 7 calendar days after the RTC is issued, the order will be cancelled by NBI.

The Service Provider will have access to a 7 week rolling calendar in which the appointment may be rescheduled.

Note: The 'Next Available' appointment slot process in rescheduling appointments is treated slightly differently. Where 'Next Available' is set to "True" then NBI book the next available appointment from the requested slot. Where the 'Next Available' flag is set to "False", then the original booked appointment is retained should the requested appointment be unavailable.

The Service Provider can change the appointment slot, contact details or notes on the order.

## 8.9 Local Arrangement

There may be an issue that arises during the appointment window (i.e. from change of ownership status to order completion) which means that the appointment cannot be fulfilled. In these instances, NBI will issue a Local Arrangement (RELA) notification indicating that the engineer/ConnectCo and End User have agreed a new appointment date and slot for order completion. The new appointment details and reason will be included in the RELA notification.

The new appointment will typically be arranged within the next 2 days, but can also be scheduled beyond this, up to 21 calendar days from when the issue occurred. If the End User wants to reschedule beyond this period, then the order will be returned to the Service Provider to action via an RESP notification.

If the Local Arrangement appointment is outside the 2 calendar day windows, but less than 21 days, then the order returns to the Service Provider via a Return of Ownership status update. This means that the Service Provider may change the appointment if required.

If an End User contacts the Service Provider to change an appointment (slot/contact details/notes) after NBI have taken ownership of the appointment, the Service Provider can request a 'Call Back' option from ConnectCo, which triggers ConnectCo to contact the End User to update the appointment if required.