

**Oregon Road User Charge  
Pilot Program**

**Help Desk  
Operations Guide**

**February 2013**



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Pilot Program**

# **Help Desk Operations Guide**

**February 2013**

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Original Report Prepared by CH2M Hill



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## Overview

This document is the Help Desk Operations Guide for the Oregon Road Usage Charge Pilot Program (RUCPP) that was deployed in the fall of 2012 and concluded February 2013. The intent of this guide is to provide direction, to all individuals involved in the operational support for the RUCPP, as to the activities, resources and responsibilities of the support team. The document is outlined into the following major sections:

- Section 1: Overview
- Section 2: Operational Support Process Overview
- Section 3: Help Desk Operations
- Section 4: Help Desk Scenarios

### Pilot Demonstration Overview

The RUCPP initial demonstration commenced during the Fall of 2012 and operated over a three-month period. A system evaluation was conducted during this 3-month period with the results of the evaluation documented in a final report prepared for the RUFTF and the Oregon Legislature.

A group of 42 volunteers from Oregon and their vehicles participated in the pilot demonstration, including Oregon legislators, transportation commission members, staff from the Governor's office, citizens participating on ODOT's 12 area commissions on transportation and ODOT employees. These participants actually paid the mileage-based road usage charge of 1.56 cents per mile. State gas taxes paid at the pump were credited or refunded to the participant based on the mileage reporting device measurements or estimated based on the vehicle's EPA MPG rating. Depending on the MPG of the vehicle, some participants ended up with a net credit, the amount of which was refunded at the end of the of the RUCPP demonstration. <sup>1</sup>

Chosen participants were required to sign an agreement. They also received online and mailed instructions for mileage reporting device installation and account set up.

Additional volunteers (21 from Washington and 23 from Nevada) also participated in the pilot project. The Washington and Nevada participants did not actually pay the tax.

### Definitions and Abbreviations

This section includes definitions that were important for the Help Desk staff to know and understand:

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<sup>1</sup> The break even value is around 19-20 MPG, based on the Oregon fuel tax of 30 cents per gallon and the road usage charge of 1.56 cents per mile. Of course, this net refund scenario exists only for the RUCPP.

- *Mileage Reporting Device*: A device and/or software physically residing in the vehicle that provides the interface to the vehicle for measuring miles traveled and for collecting other related data from the vehicle, processing and storing the information, and communicating with other system components and subsystems. For the purpose of the RUCPP, mileage reporting devices are identified as either **Basic** (with no location-determination electronics or capability) or **Advanced** (with location-determination electronics or capability). Each participant (except those that selected the Prepaid Flat Rate Plan) had a mileage reporting device installed in their vehicle.
- *On-board Diagnostics II (OBD II)*: A vehicle's self-diagnostic and reporting capability. Participants had to install their mileage reporting device into the vehicle's OBD II port.
- *Road Charge Processing System (RCP)*: A subsystem that collects mileage records from the vehicles, calculates the tax due, and stores the mileage/tax records. Additionally, the RCP creates and maintains the RP accounts, collects the tax payments from the RP, and forwards the collected taxes to ODOT on a periodic basis. The RCP includes the Transaction Processing and RP Account Management functions. For this pilot, participants had two RCP options: ODOT or Sanef. This may also be referred to as the *Road Charge Service Provider*.
- *Road Usage Charge Pilot Program (RUCPP)*: The program consisting of multiple pilot demonstrations. The initial pilot demonstration commenced in the fall of 2012.
- *Vehicle Identification Number (VIN)*: A unique serial number used by the automotive industry to identify individual motor vehicles.
- *Undifferentiated Mileage*: Mileage collected without the use of vehicle location technology (i.e., GPS).

## Operational Support Process Overview

Throughout the pilot, CH2M Hill provided “Tier 1” support services on behalf of ODOT and Tier 2 support was provided by Sanef (RCP vendor) and Raytheon (mileage reporting device vendor). The CH2M Hill Help Desk staff was initially involved during the System Testing (beginning October 9th) and Onboarding of the participants (beginning October 22nd). During System Testing and Onboarding the Help Desk was covered by Jenny Roberts from CH2M Hill.

Once all participants signed up and installed their mileage reporting device, the Help Desk was covered by additional CH2M Hill staff and a Call Center, Sound Telecom, for the entire 3-month pilot. This support included answering calls and responding to e-mails from pilot participants and resolving issues (e.g., equipment issues, errors with invoices, account management issues, etc.). *Exhibit 1* summarizes the schedule of activities and the appropriate Help Desk staff. *Exhibit 2* displays a high-level overview of the support process for the Help Desk.

**Exhibit 1: Summary of Help Desk Activities and Staff**

Activity	Start Date	Help Desk Tier 1 Support Staff	Days / Hours (Pacific)	Affiliation
System Testing	10/1/12	Jenny Roberts	M-F / 7:00 AM – 9:00 PM	CH2M Hill
Participant Onboarding	10/22/12	Jenny Roberts	M-F / 7:00 AM – 9:00 PM Weekends 10:00 AM – 2:00 PM	CH2M Hill
		Lou Neudorff	M-F / 7:00 AM – 9:00 PM Weekends 10:00 AM – 2:00 PM	CH2M Hill
		Lynn Averbeck	M-F / 7:00 AM – 9:00 PM Weekends 10:00 AM – 2:00 PM	ODOT
Begin Pilot	10/29/12	Diane Kestner	M-F / 8:00 AM – 5:00 PM	CH2M Hill
		Jenny Roberts	M-F / 7:00 AM – 8:00 AM and 5:00 PM – 9:00 PM Weekends 10:00 AM – 2:00 PM	CH2M Hill
		Jennifer Staley	M-F / 7:00 AM – 9:00 PM	CH2M Hill
		Mike Warren	M-F / 7:00 AM – 8:00 AM and 5:00 PM – 9:00 PM Weekends 10:00 AM – 2:00 PM	CH2M Hill
		Lou Neudorff	M-F / 7:00 AM – 8:00 AM and 5:00 PM – 9:00 PM Weekends 10:00 AM – 2:00 PM	CH2M Hill
		Call Center	24/7 coverage	Sound Telecom

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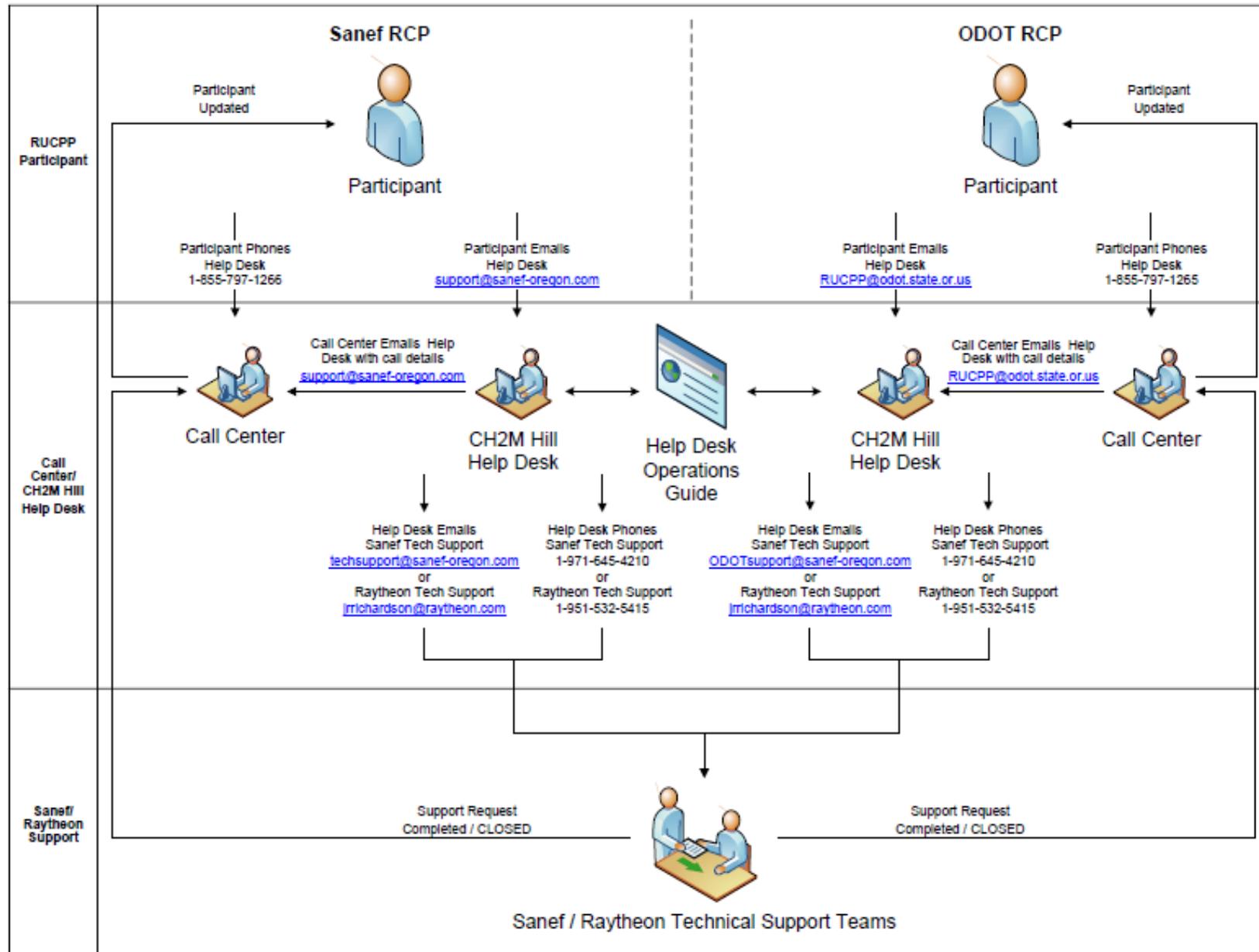


Exhibit 2: High-Level Overview of Support Process

## RUCPP Operations Support Team

Exhibit 3 provides names and contact information for the RUCPP Operations Support Team

**Exhibit 3: Operations Support Team**

Name	Affiliation	Role	E-mail Address	Phone
Lynn Averbeck	ODOT	Operations Coordinator	<a href="mailto:lynn.averbeck@odot.state.or.us">lynn.averbeck@odot.state.or.us</a>	503-385-5155
Jenny Roberts	CH2M HILL	CH2M Hill Operations Support Lead	<a href="mailto:jRoberts@ch2m.com">jRoberts@ch2m.com</a>	720-286-0912
Lou Neudorff	CH2M HILL	Help Desk Team	<a href="mailto:Lou.neudorff@ch2m.com">Lou.neudorff@ch2m.com</a>	646-345-5971
Mike Warren	CH2M HILL	Help Desk Team	<a href="mailto:Mike.warren@ch2m.com">Mike.warren@ch2m.com</a>	720-480-2895
Diane Kestner	CH2M HILL	Help Desk Team	<a href="mailto:Diane.kestner@ch2m.com">Diane.kestner@ch2m.com</a>	503-736-4215
Jennifer Staley	CH2M HILL	Help Desk Team	<a href="mailto:Jennifer.staley@ch2m.com">Jennifer.staley@ch2m.com</a>	503-736-4266
General Support	Sanef	Tier 2 Tech Support	<a href="mailto:techsupport@sanef-oregon.com">techsupport@sanef-oregon.com</a>	971-645-4210
Jon Wade*	Sanef	Tier 2 Tech Support	<a href="mailto:jon.wade@sanefolling.co.uk">jon.wade@sanefolling.co.uk</a>	+44 7595221522
Charlie Hewson*	Sanef	Tier 2 Tech Support	<a href="mailto:charles.hewson@sanefolling.co.uk">charles.hewson@sanefolling.co.uk</a>	+44 7882701316
JR Richardson	Raytheon	Tier 2 Tech Support	<a href="mailto:jrrichardson@raytheon.com">jrrichardson@raytheon.com</a>	951-532-5415
* To be contacted in emergency situations only. Always contact the Sanef General Support team first.				

## Sound Telecom Call Center – Participants “call” the Help Desk

All phone calls to the Help Desk were answered by a Call Center, Sound Telecom and ran as follows:

- Phones were answered as “Road Usage Charge Pilot Help Desk. My name is (responder name); how may I help you?”
- The Call Center recorded the following preliminary information (if available) from the participant:
  - Name
  - Plan (ODOT, Basic, Advanced, Smartphone, Prepaid Flat Rate)
  - Issue Type (Onboarding, Account, Equipment, Other)
  - Description of Issue
  - Contact Information (phone or e-mail)

- The Call Center notified participant of next actions: “Thank you for calling the Help Desk. The technical support team has been notified and someone will contact you for additional information or when the issue has been resolved.”
- If participant asked when they should expect to hear back, the response was: “You will hear from someone within two hours”.
- Finally, the Call Center sent an e-mail to the CH2M Hill Help Desk summarizing the information collected during the call. The CH2M Hill Help Desk staff then either followed up with the participant and/or took the necessary action to resolve the issue.

### **CH2M Hill Help Desk Staff – Participants “e-mail” the Help Desk**

The CH2M Hill Help Desk staff was responsible for all e-mails to the Help Desk from participants and the Call Center. When the Help Desk received an e-mail from a participant, they immediately responded to the participant with the resolution or the following:

“Thank you for contacting the Road Usage Charge Pilot Help Desk. We have received your support request and will get back to you as soon as possible with a resolution.”

If an issue could not be immediately resolved, as in the case of a mileage reporting device malfunction or related problem, Help Desk staff escalated the issue to the appropriate vendor for Tier 2 support. Help Desk staff coordinated all efforts involved in the resolution of problems and issues with both vendors and participants. Help Desk staff did not give out Tier 2 support contact information to participants. As part of the operational support effort, Help Desk staff logged all support requests received including the date, time, issue and resolution in the Help Desk Log on the project SharePoint site.

*If someone other than the Help Desk was contacted directly by a participant with a support request, that individual immediately contacted the Help Desk so the issue and resolution could be logged.*

*If the media or any non-participant contacted the Help Desk, their name/number was recorded and the ODOT Operations Coordinator was contacted.*

During the onboarding process (detailed in Section 4) the CH2M Hill Operations Support Lead developed and maintained the participant database including all participant information.<sup>2</sup> The database was available to the Help Desk on SharePoint

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<sup>2</sup> To protect privacy, the basic spreadsheet with contact and vehicle information for each participant was deleted from this updated version of the Help Desk Operations Guide.

as a reference when participants called. All participant information was available to assist with the support request (plan, mileage reporting device, account number, contact information, etc.).

Help Desk staff contacted the CH2M Operations Support Lead and the ODOT Operations Coordinator when calls were received from specific high profile participants (i.e., legislators).



## 3

### Help Desk Operations

Tier 1 support for the Oregon RUCPP was provided by CH2M Hill. Hours of operation for the Help Desk were:

- Monday-Friday: 7:00 AM – 9:00 PM PDT
- Weekends and holidays: 10:00 AM – 2:00 PM PDT

To maintain two separate RCPs (Sanef and ODOT) for the pilot, participants were provided with different contact numbers and support e-mail addresses depending on which RCP they chose when they selected their plan and set up their account. However, all calls and e-mails were directed to the CH2M Hill Help Desk. The contact information for each RCP is provided below.

#### Help Desk E-mails and Phone Numbers

This section includes all the Help Desk e-mails and phone numbers for participants to contact Tier 1 support and for the Help Desk to contact Tier 2 support (Sanef or Raytheon) during the pilot.

#### Help Desk Contact Information Provided to Participants – Participant Contacts Help Desk

The following information was provided to the participants when they chose their plan and signed up for their account:

##### ***ODOT RCP***

For participants who chose either the ODOT Plan or the Prepaid Flat Rate Plan, the following Help Desk information was provided.

- ***E-Mail:*** [RUCPP@odot.state.or.us](mailto:RUCPP@odot.state.or.us) – with auto-forwarding to Help Desk ([support@sanef-oregon.com](mailto:support@sanef-oregon.com))
- ***Phone:*** 1-855-797-1265 (toll free)

##### ***Sanef RCP***

For participants who chose the Basic Plan, Advanced Plan, or Smartphone Plan, the following Help Desk information was provided:

- E-Mail: [support@sanef-oregon.com](mailto:support@sanef-oregon.com)
  - Accessed by Help Desk at <http://mail.sanef-oregon.com>

Username: [support@sanef-oregon.com](mailto:support@sanef-oregon.com)

Password: RUCPPsanef1

- Phone: 1-855-797-1266 (toll free)

## **Tier 2 Technical Support Required - Help Desk e-mails or calls Sanef Technical Support**

If the Help Desk staff referenced the Help Desk Guide and still could not resolve an issue, Sanef provided Tier 2 support to the Help Desk during the following hours:

- *E-mails received between 7:00 AM – 2:00 PM PDT (3:00 PM – 10:00 PM UK):* Same-day response (depending on issue) otherwise they were responded to by 8:00 AM PDT (4:00 PM UK) the next working day.
- *Non-urgent phone calls to 1-971-645-4210: 7:00 AM – 10:00 AM PDT (3:00 PM – 6:00 PM UK).* Outside of these hours, calls to 1-971-645-4210 were diverted to voice mail to be dealt with the next work day.
- *Urgent (escalation) phone calls to Jon Wade or Charlie Hewson's cell phones: 1:00 AM – 3:00 PM PDT (9:00 AM – 11:00 PM UK)*

Tier 2 support or the Sanef Technical Support team was contacted via the following information.

### ***Oregon RCP***

If a participant who had selected a plan with the ODOT RCP contacted the Help Desk (incoming e-mail from [lynn.averbeck@odot.state.or.us](mailto:lynn.averbeck@odot.state.or.us)) and Sanef Tier 2 support was required, the following e-mail and phone numbers were used:

- E-Mail: [ODOTsupport@sanef-oregon.com](mailto:ODOTsupport@sanef-oregon.com)
- Phone: 1-971-645-4210 (always e-mail first)
  - **Tier 1 Escalation** (Jon Wade) +44 7595221522 (emergencies only)
  - **Tier 2 Escalation** (Charlie Hewson) +44 7882701316 (emergencies only)

*The Sanef general technical support number provided above was always be used first. Escalation to Jon Wade and/or Charlie Hewson was only for use in an emergency.*

### **Sanef RCP**

If a participant that selected a plan with the Sanef RCP contacted the Help Desk and Sanef Tier 2 support was required, the following e-mail and phone numbers were used:

- E-Mail: [techsupport@sanef-oregon.com](mailto:techsupport@sanef-oregon.com)
- Phone: 1-971-645-4210 (always e-mail first)
  - **Tier 1 Escalation** (Jon Wade) +44 7595221522 (emergencies only)
  - **Tier 2 Escalation** (Charlie Hewson) +44 7882701316 (emergencies only)

The Sanef general technical support number above was always used first when Tier 2 support had to be contacted by phone. Escalation to Jon Wade and/or Charlie Hewson was only used in case of emergency.

*If a participant using the Smartphone Plan contacted the Help Desk with an issue specific to their Smartphone App or mileage reporting device, Raytheon Tier 2 Technical Support was required. Raytheon Tier 2 Technical Support contact information is provided below.*

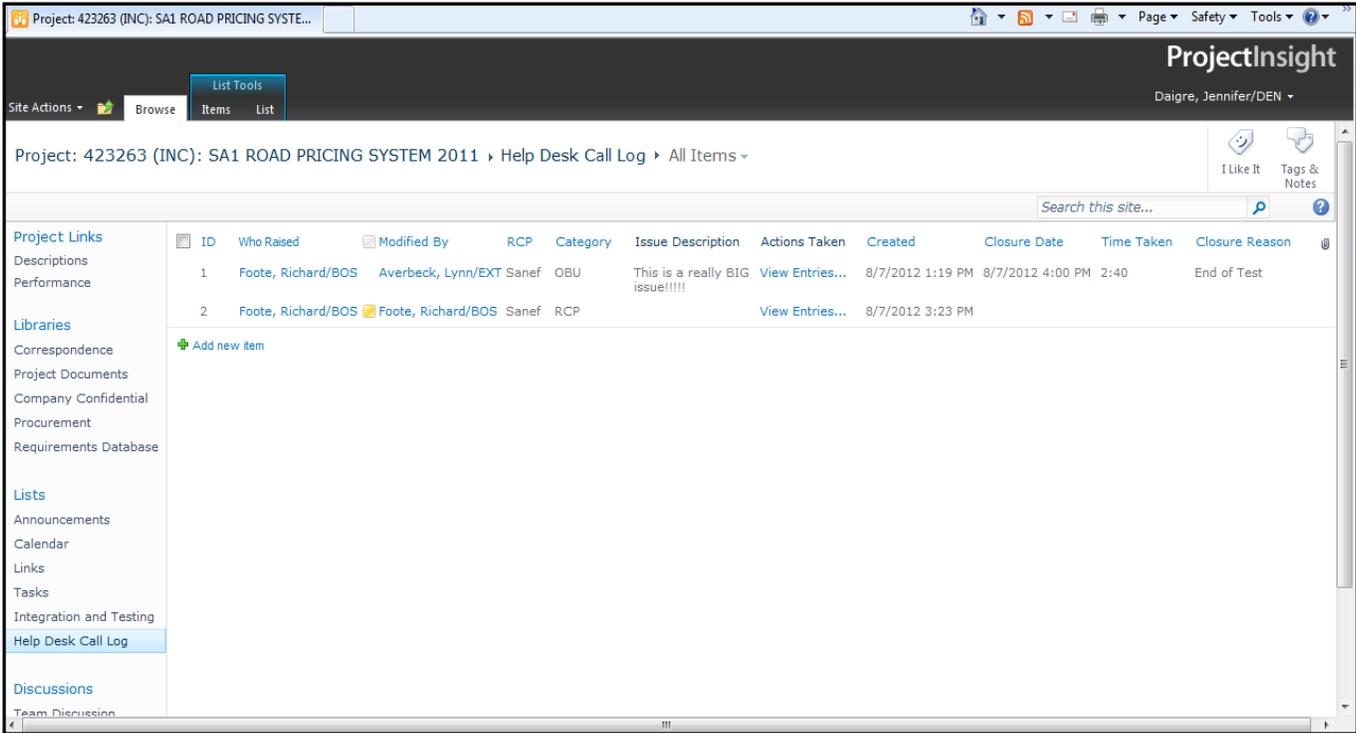
### **Tier 2 Technical Support Required – Help Desk e-mails or calls Raytheon (Smart Phone Plan Only)**

- E-Mail: [jrrichardson@raytheon.com](mailto:jrrichardson@raytheon.com)
- Phone: 1-951-532-5415 (JR Richardson)
- Hours: M-F: 7:00 AM – 9:00 PM

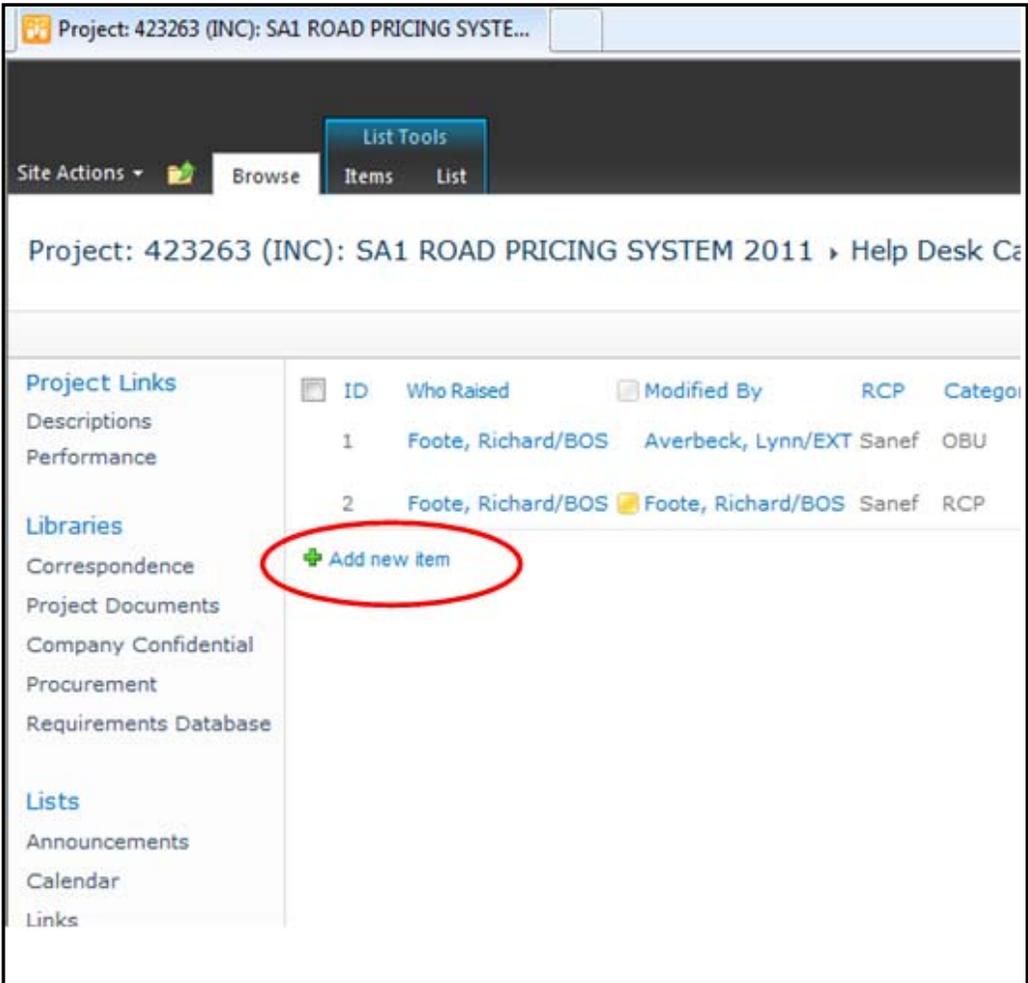
### **Help Desk Log**

As part of the operational support effort, the Help Desk staff logged all support requests received, including the date, time, issue and resolution. All Tier 2 support requests made to the vendor, resolution times and status were also logged. A maintenance and support log based on user, equipment type, issue type (support, equipment failure, etc.) was also developed and maintained by Help Desk staff throughout RUCPP operations. This Help Desk Log was saved to the CH2M Hill SharePoint Site. *Exhibit 4* displays a snapshot of the Help Desk Call Log.

### Exhibit 4: Help Desk Call Log



Click on "+Add new item" to create a new entry in the Help Desk Log



Once the new item window opens, enter information in the form fields with the participant's call/e-mail details.

Project: 423263 (INC): SA1 ROAD PRICING SYSTEM 2011

Edit

Save Cancel Paste Copy Attach File Spelling

Commit Clipboard Actions Spelling

Customer \*  
Customer making the service request

VIP  
  
Check the box if the customer initiating service request is a VIP

Request Date \*  
10/4/2012  
Date the service request is received from the customer

Reported Via \*  
Reported via phone or e-mail

Customer Contact \*  
Phone number or e-mail address of customer initiating service request

RCP \*  
Choose the Road Charge Processing system the Responsible Party uses.

Issue Type \*  
Category of issue

Issue Description \*  
Describe the issue raised in the Service Request

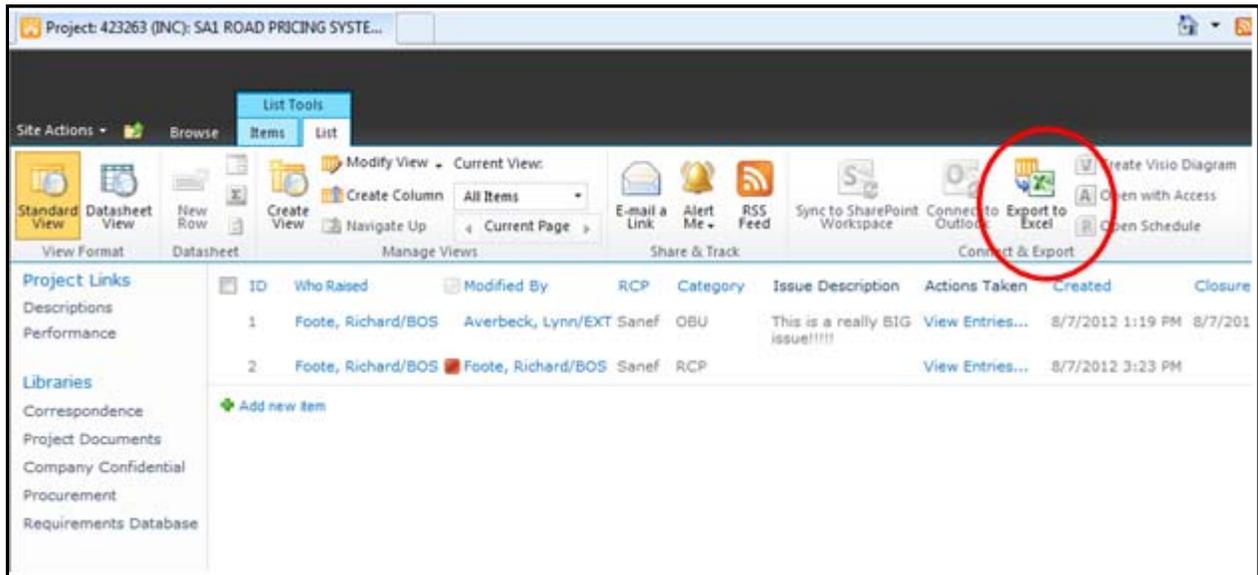
Actions Taken  
Enter a description of the steps taken to resolve issue

Closure Date  
12 AM 00

Closure Reason  
Reason the Support Request is being closed.

Save Cancel

A summary spreadsheet of all Help Desk entry items can be exported to Excel at any time during the pilot.



## 4

### Help Desk Scenarios

The Help Desk provided frontline support to all pilot participants by fielding all initial calls/e-mails and resolving issues (e.g., equipment, invoices, etc.) to the greatest extent possible. This section presents the process followed by Help Desk staff for different issues/scenarios expected to be encountered by participants during the pilot. Help Desk operations during participant onboarding were different and are detailed in the following section. *Exhibit 5* displays a flowchart of the user support process during normal Help Desk operations.

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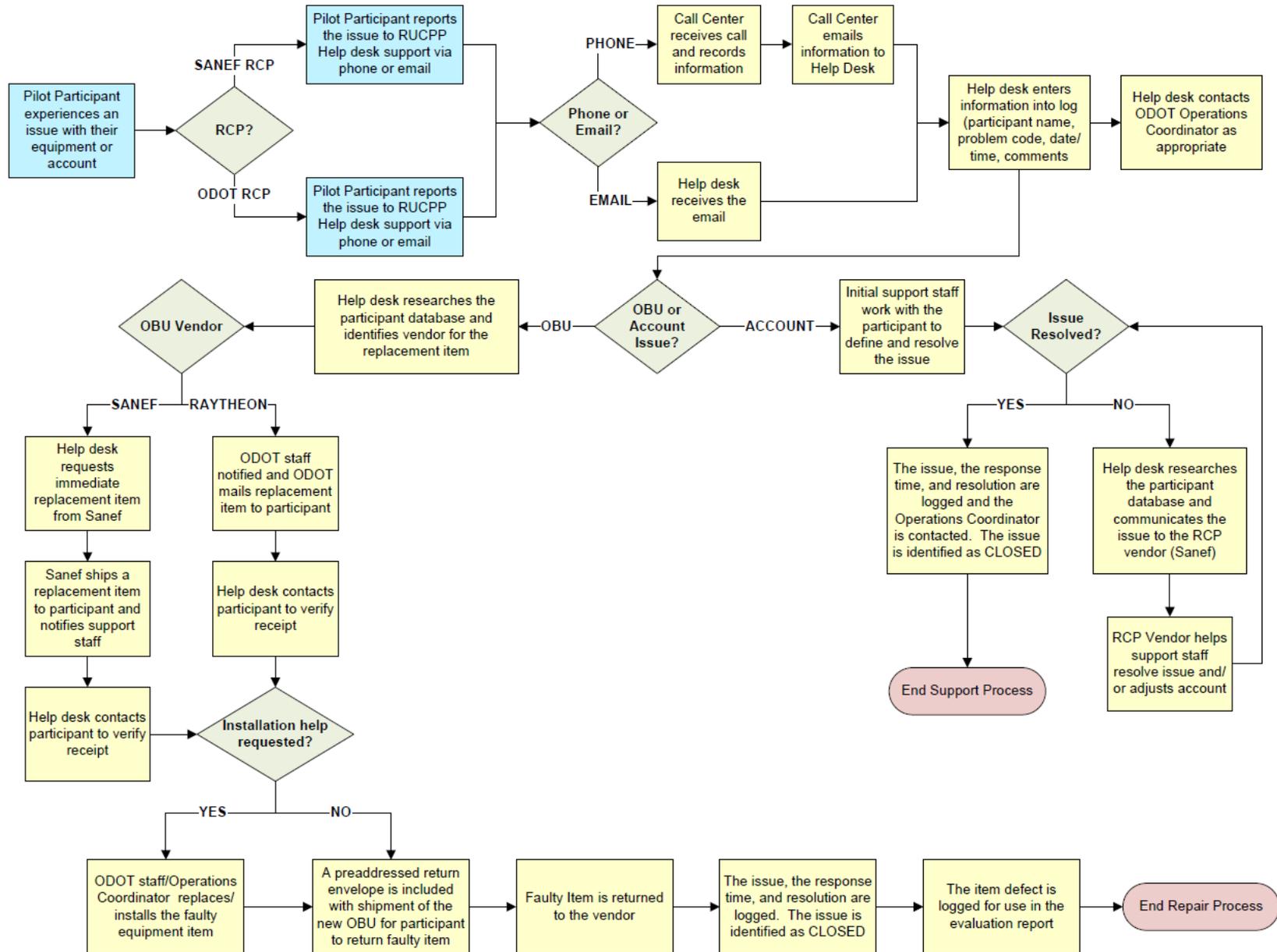


Exhibit 5: RUCPP User Support Process

## **Onboarding Issues**

Help Desk operations during onboarding were handled differently than during normal operations to ensure a smooth introduction to the pilot for participants. During this time the Help Desk was covered by Jenny Roberts and Lou Neudorff from CH2M Hill. Incoming calls to the Help Desk were not directed to the Call Center during onboarding, but were answered by Jenny or Lou directly (800 numbers were routed to their phones). *Exhibit 6* displays a flowchart of the RUCPP onboarding process.

Prior to onboarding (or account sign up) participants were required to sign a participant agreement. The CH2M Hill Operations Support Lead notified the ODOT RUCPP Operations Coordinator when Washington participants signed the agreement; the Operations Coordinator then contacted the Washington DOT pilot participant coordinator (Jeff Doyle). The onboarding process assumed all participants had signed the agreement, were included in the participant database and that an e-mail had been distributed to participants from ODOT (James Whitty) asking them choose a plan and create their account.

During the onboarding process, participants could contact the Help Desk to request support with the items described in this section.

## **Plan Options and Sign Up**

Participants were able to contact the Help Desk with questions about different plan options. *Exhibit 7* provides a summary of the available RUCPP plans. Plan information and a plan sign-up form were also made available on the participant website at <http://roadchargeoregon.org/><sup>3</sup>

## **Mileage Reporting Device Installation Help**

If a participant contacted the Help Desk because they were having trouble locating their OBD II port, a link to a “portFinder” was provided, where the following process occurred:

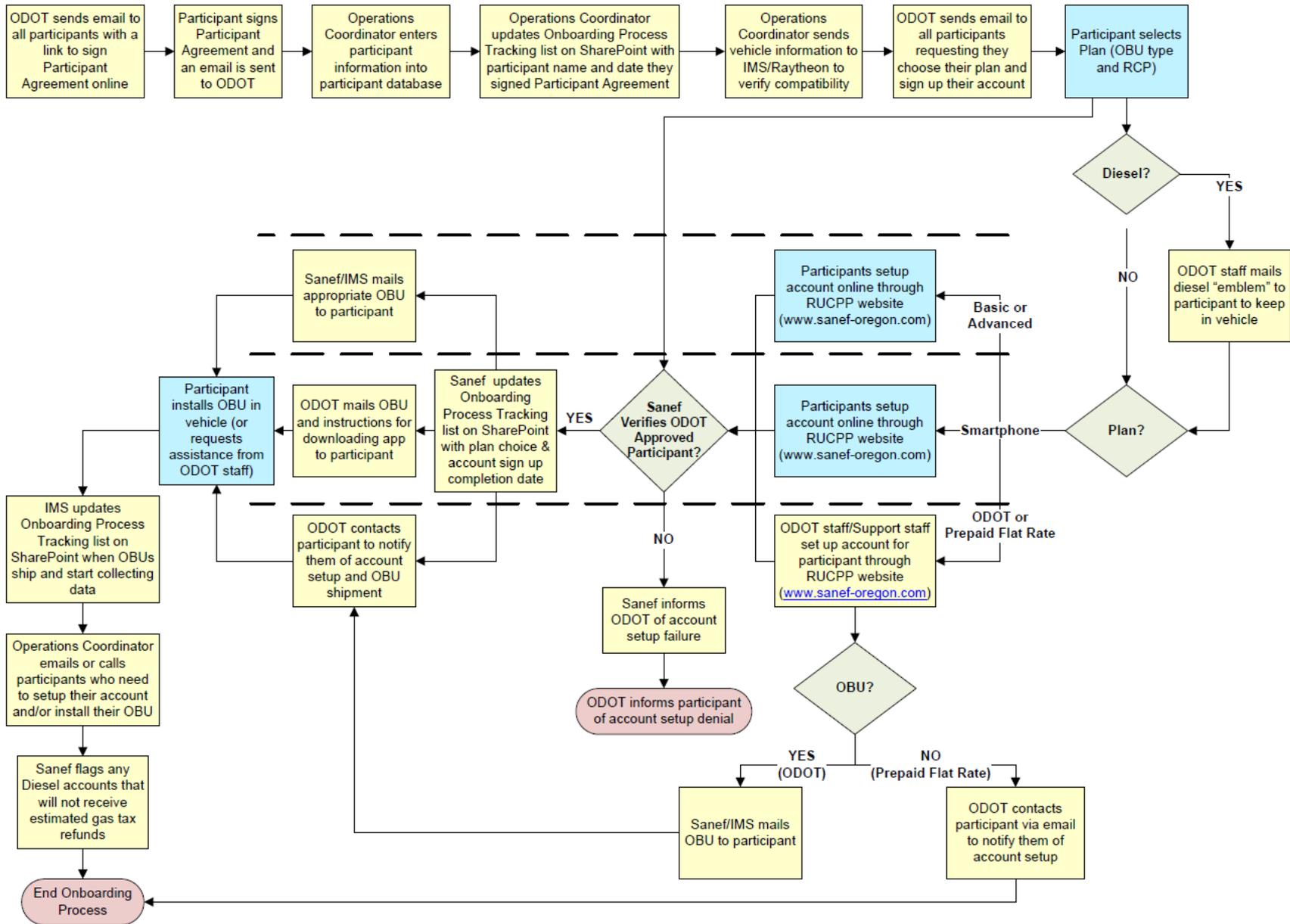
- Enter vehicle’s year/make/model
- Describe the location of the port
- If the participant still had a difficult time installing their device, they were informed that someone from ODOT could help them install it. The Help Desk coordinated with the ODOT/CH2M Team to determine who would meet the participant, when and where.

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<sup>3</sup> The Plan Sign Up function is currently not functional on this website since the pilot project is completed.

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**Exhibit 6: RUCPP Onboarding Process**

### Exhibit 7: Summary of RUCPP Plans

SERVICE PLAN NAME	MILEAGE REPORTING DEVICE	PAYMENT METHOD	PLAN FEATURES
ODOT	Basic – No GPS or other location technology	Check	<ul style="list-style-type: none"> <li>• Mileage reporting device installed in car that reports all miles driven regardless of location</li> <li>• <b>Account set up through ODOT</b></li> <li>• Road usage charge based on all miles driven</li> <li>• Credit included on statement for estimated amount of state gas tax paid (for gasoline vehicles)</li> <li>• Monthly billing (end of month)</li> <li>• Statement sent via U.S. mail and paid by check via U.S. mail</li> <li>• Help Desk for customer service</li> </ul>
Basic	Basic – No GPS or other location technology	Credit / Debit	<ul style="list-style-type: none"> <li>• Mileage reporting device installed in car that reports all miles driven regardless of location</li> <li>• <b>Online account setup and access through Sanef website</b></li> <li>• Road usage charge based on all miles driven</li> <li>• Credit included on statement for estimated amount of state gas tax paid (for gasoline vehicles)</li> <li>• Monthly billing (end of month)</li> <li>• Statement sent via e-mail, paid online or by credit or debit card</li> <li>• Help Desk for customer service</li> </ul>
Advanced	Advanced – GPS	Credit / Debit	<ul style="list-style-type: none"> <li>• Mileage reporting device installed in car that reports miles driven miles differentiated by location</li> <li>• <b>Online account setup and access through Sanef website</b></li> <li>• Road usage charge based only on miles driven on public roads in Oregon</li> <li>• Credit included on statement for estimated amount of state gas tax paid (for gasoline vehicles)</li> <li>• Monthly billing (end of month)</li> <li>• Statement sent via e-mail, paid online or by credit or debit card</li> <li>• Help Desk for customer service</li> </ul>
Smartphone	Basic – with Smartphone GPS App	Credit / Debit	<ul style="list-style-type: none"> <li>• Mileage reporting device installed in car that records all miles driven regardless of location</li> <li>• <b>Online account setup and access through Sanef website</b></li> <li>• App available for Android Smartphone that links to basic onboard device to differentiate mileage based on location when activated</li> <li>• Road usage charge based on all miles driven, except when Smartphone is in the vehicle, activated, and linked to onboard device (in which case mileage is based only on miles driven in Oregon)</li> <li>• Credit included on statement for estimated amount of state gas tax paid (for gasoline vehicles)</li> <li>• Monthly billing (end of month)</li> <li>• Statement sent via e-mail, paid online or by credit or debit card</li> <li>• Help Desk for customer service</li> </ul>
Prepaid Flat Rate	None	Check	<ul style="list-style-type: none"> <li>• Road usage charge \$45 per month in lieu of reporting and paying actual miles driven</li> <li>• <b>Account set up through ODOT</b></li> <li>• One-time up-front payment</li> <li>• No credit for fuel tax paid</li> <li>• Invoice sent via U.S. mail and paid by check via U.S. mail</li> <li>• Help Desk for customer service</li> </ul>

## Mileage Reporting Device/Equipment Issues

If a participant contacted the Help Desk when having an issue with their mileage reporting device or other equipment (i.e., SmartPhone App), the Help Desk followed the steps outlined below:

1. Participant e-mailed or called the Help Desk.
  - a. Sanef RCP [support@sanef-oregon.com](mailto:support@sanef-oregon.com) or 1-855-797-1266
  - b. ODOT RCP [RUCPP@odot.state.or.us](mailto:RUCPP@odot.state.or.us) or 1-855-797-1265
2. Help Desk support received the call or e-mail and entered information into the Help Desk log (saved to SharePoint site).
3. Help Desk support researched the participant database and identified the vendor for the replacement item.
4. Support staff requested an immediate replacement item from vendors (e-mail sent to Sanef Technical Support team had a reference ID number assigned to it which was automatically assigned in the Help Desk Log on SharePoint – i.e., subject of e-mail was SR-001, SR-002, etc.).
  - a. Sanef/IMS
    - Sanef RCP [techsupport@sanef-oregon.com](mailto:techsupport@sanef-oregon.com) or 1-971-645-4210
    - ODOT RCP [ODOTsupport@sanef-oregon.com](mailto:ODOTsupport@sanef-oregon.com) or 1-971-645-4210
  - b. Raytheon – ODOT Operations Coordinator (Lynn Averbeck) was notified and ODOT mailed a replacement item to the participant. The Help Desk notified Raytheon ([irrichardson@raytheon.com](mailto:irrichardson@raytheon.com)) and requested a new spare device be sent to ODOT.
    - [lynn.averbeck@odot.state.or.us](mailto:lynn.averbeck@odot.state.or.us) or 1-503-385-5155
5. Mileage Reporting Device Vendor or ODOT shipped a replacement device to participant and notified Help Desk staff ([RUCPP@odot.state.or.us](mailto:RUCPP@odot.state.or.us)).
6. Help Desk staff contacted the participant to verify receipt.
7. A pre-addressed return envelope was included with shipment of the new mileage reporting device so the participant could return the faulty device to the Help Desk.

8. Help Desk staff updated the Help Desk log – noted the device defect, confirmed the return of the faulty device, contacted the participant to close the Support Request (i.e., closed the loop) and updated the issue status to CLOSED.

## **Changes to Participant's Account**

### **Update Personal Information (Address, Vehicle, etc.)**

If a participant contacted the Help Desk to update personal information including such things as change of address or vehicle, the Help Desk followed the steps outlined below:

1. Participant e-mailed or called the Help Desk.
  - a. Sanef RCP [support@sanef-oregon.com](mailto:support@sanef-oregon.com) or 1-855-797-1266
  - b. ODOT RCP [RUCPP@odot.state.or.us](mailto:RUCPP@odot.state.or.us) or 1-855-797-1265
2. Help Desk support received the call or e-mail and entered information into Help Desk log (stored to SharePoint site).
3. Help Desk support sent updated information in an e-mail to Sanef Technical Support team (e-mail sent to Sanef Technical Support team had a reference ID number assigned to it which was automatically assigned in the Help Desk Log on SharePoint – i.e., Subject of e-mail was SR-001, SR-002, etc.).
  - a. Sanef RCP [techsupport@sanef-oregon.com](mailto:techsupport@sanef-oregon.com)
  - b. ODOT RCP [ODOTsupport@sanef-oregon.com](mailto:ODOTsupport@sanef-oregon.com)
4. The Sanef Technical Support team modified personal information in the account and e-mailed the Help Desk ([RUCPP@odot.state.or.us](mailto:RUCPP@odot.state.or.us)).
5. The Help Desk updated the Help Desk log to identify issue as CLOSED and contacted the participant to close the Support Request. (i.e., closed the loop).

## **Change Plan <sup>4</sup>**

When a participant contacted the Help Desk and asked to switch plans (see *Exhibit 7* for a summary of plans), the Help Desk would follow the following process:

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<sup>4</sup> This scenario was not tested or used in the pilot. None of the participants chose to change plans.

1. Participant e-mailed or called the Help Desk.
  - a. Sanef RCP [support@sanef-oregon.com](mailto:support@sanef-oregon.com) or 1-855-797-1266
  - b. ODOT RCP [RUCPP@odot.state.or.us](mailto:RUCPP@odot.state.or.us) or 1-855-797-1265
2. Help Desk support received the call or e-mail and entered information into Help Desk log (saved to SharePoint site).
3. Help Desk support sent the plan change request in an e-mail to Sanef Technical Support team (e-mail sent to Sanef Technical Support team had a reference ID number assigned to it which was automatically assigned in the Help Desk Log on SharePoint – i.e., Subject of e-mail should be SR-001, SR-002, etc.).
  - a. Sanef RCP [techsupport@sanef-oregon.com](mailto:techsupport@sanef-oregon.com)
  - b. ODOT RCP [ODOTsupport@sanef-oregon.com](mailto:ODOTsupport@sanef-oregon.com)
4. The Sanef Technical Support team will update account (if necessary):
  - a. Change from ODOT Plan to Basic or Advanced (Sanef) Plan
    - Participant set up account online ([www.sanef-oregon.com](http://www.sanef-oregon.com))
    - If plan change requires a mileage reporting device change (i.e., Basic to Advanced):
      1. Sanef/IMS mailed Advanced device to participant along with return label for replaced device
      2. Participant installed new device in vehicle and activated through website ([www.sanef-oregon.com](http://www.sanef-oregon.com))
      3. Participant mailed back Basic device with provided packaging
  - b. Change from Basic (Sanef) Plan to Advanced (Sanef) Plan
    - Sanef/IMS mailed Advanced device to participant along with return label for replaced device
    - Participant installed new device in vehicle and activated through website ([www.sanef-oregon.com](http://www.sanef-oregon.com))
    - Participant mailed back Basic device in provided packaging

- c. Change from Advanced (Sanef) Plan to SmartPhone Plan (Sanef/ Raytheon)
  - No RCP change required
  - Sanef/IMS mailed return label and packaging to participant
  - ODOT linked new Raytheon device to account and mailed device to participant
5. Sanef e-mailed the Help Desk ([RUCPP@odot.state.or.us](mailto:RUCPP@odot.state.or.us)) confirming request was completed.
6. The Help Desk updated the Help Desk log to identify issue as CLOSED and contacted the participant to close the Support Request. (i.e., closed the loop).

## **Invoice Issues**

If a participant contacted the Help Desk and had an issue with their invoice, the Help Desk would follow the steps outlined below:

### **Error in Invoice**

1. RUCPP participant e-mailed or called the Help Desk.
  - a. Sanef RCP [support@sanef-oregon.com](mailto:support@sanef-oregon.com) or 1-855-797-1266
  - b. ODOT RCP [RUCPP@odot.state.or.us](mailto:RUCPP@odot.state.or.us) or 1-855-797-1265
2. Help Desk support received the call or e-mail and entered information into Help Desk log (saved to SharePoint site).
3. Help Desk support sent e-mail to Sanef Technical Support team (e-mail sent to Sanef Technical Support team had a reference ID number assigned to it which was automatically assigned in the Help Desk Log on SharePoint – i.e., Subject of e-mail was SR-001, SR-002, etc.).
  - a. Sanef RCP [techsupport@sanef-oregon.com](mailto:techsupport@sanef-oregon.com)
  - b. ODOT RCP [ODOTsupport@sanef-oregon.com](mailto:ODOTsupport@sanef-oregon.com)
4. The Sanef Technical Support team manually created a transaction in the RCP sub-system and re-issued a new invoice, if required. If the participant had already paid the invoice, then a refund was issued.

5. Sanef Technical Support team would send an e-mail to the Help Desk ([RUCPP@odot.state.or.us](mailto:RUCPP@odot.state.or.us)) once the issue had been resolved.
6. The Help Desk updated the Help Desk log to identify issue as CLOSED and contacted the participant to close the Support Request (i.e., closed the loop).