

# Reduce Energy Assistance Program Costs. Automate Appointment Scheduling & Award Inquiries. Increase Staff Efficiency. Improve Customer Service.

Introducing the **LIHEAP Scheduling & Management System (LSM)**, a fully-integrated scheduling and interactive phone system that delivers a 24/7 automated solution for administering LIHEAP, weatherization and other energy assistance programs.

Agencies and utilities can now automate routine pre-qualification, appointment creation, confirmation, rescheduling and cancellations, plus application and award status inquiries with no direct customer interaction.

Integrated reports and data extracts provide easy access to applicant activity, call statistics, staff utilization and program performance.

The LIHEAP Scheduling & Management System has been developed, tested and refined by users with real LIHEAP applicants. The result? A purpose-built solution proven to serve the unique needs of energy assistance program administrators.

With no software to install or maintain, the LSM frees you and your staff to focus on the activities that really matter to make your programs truly successful.



Eliminate staff telephone time for routine scheduling tasks or status inquiries.



Serve more applicants in less time and reduce scheduling/reporting costs by as much as 60% or more!



Customize appointment schedules by location, capacity, availability and other variables.



Print, download and share staff schedules, reports and more.



Rest easy with best practices and certified protocols for program and data security.

## LSM Program Statistics

November 2011 to April 2016

(Total Volume for all Community Action Agencies using the LSM)

<b>Total Calls Received</b>	<b>1,057,901</b>
<b>General Inquiries</b>	<b>831,236</b>
<b>Appointment Creations</b>	<b>113,899</b>
<b>Appointment/Pledge Verifications</b>	<b>92,681</b>
<b>Program Inquiries</b>	<b>79,212</b>
<b>Appointment Cancellations</b>	<b>12,163</b>

## Interested In Learning More?

To discuss the LIHEAP Scheduling & Management System, view a demo or learn more about how the LSM can pay for itself, please contact:

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# Key System Features

## Agency/Applicant Benefits

- 24/7 phone-based appointment scheduling, cancellation and immediate confirmation of set appointments
- Automated pre-qualification process
- Automated application or award status checks
- Reduced no-shows with pre-appointment reminder calls

## Appointment Scheduling

- Centralized application manages appointment schedules for all Reps across multiple locations
- One-on-one or group appointments by location automatically filled by clients through the phone
- Appointment time durations can be customized in 5 minute increments
- Duplicate or past appointment prescreening process before new appointments can be scheduled
- Crisis appointments can be created for manual or phone appointment setting
- Existing appointments easily modified (reassigned, cancelled, rescheduled, different appointment type, etc.)

## Appointment Viewing

- Instant access to at-a-glance calendar views of all appointments by location and date
- View or print daily appointments by Rep
- One-click access from calendar view to appointment details and client record

## Centralized Client Database

- New or updated client data is captured from initial IVR interactions and/or staff input to produce a complete record of program activity
- Prior or existing client data can be imported into the LSM for client and administrative efficiency

- Records include standard individual data fields, client records and key program information:
  - Associated household members
  - Existing or past appointments
  - Application and award dates and amounts

## Administering Multiple Assistance Programs

- Create program-specific appointment schedules
- Track and report multiple program awards for individual clients

## Reporting Capabilities

- Run common reports with a click of a button to view or download:
  - Scheduled appointments by type and location (date range function)
  - Incoming call statistics (date range function)
  - Denied applications
- Entire client database can be filtered and sorted by attributes for viewing or downloading
- Download all program data for use in other software or systems
- Custom reporting is available upon request

## Administrative Features

- Customize and manage key program features and schedules:
  - Assign appointment types to one or more locations
  - Adjust appointment time durations
  - Define assistance program types
  - Set appointment hours and capacity per location
  - Assign reps to specific locations
  - Manage number of open appointments to offer by day, week or month
  - Manage key IVR settings and greetings

## Can the LSM System Really Pay for Itself?

Yes! The LIHEAP Scheduling & Management System provides significant program savings and efficiency for our Community Action Agency partners ... and can do the same for your CAA.

If your program employs just one full-time employee earning \$15 per hour to explain program requirements, pre-qualify households, set/modify appointments and prepare program-related reports - the LSM could reduce your cost for these tasks by as much as 60%. If you have multiple employees performing these tasks and/or multiple locations, your savings could be even more!

**Free up your staff to do the work that better utilizes their skills and talents. Enjoy a more efficient and effective Energy Assistance program with the LSM!**