CalSAWS

California Statewide Automated Welfare System

Design Document

CIV-103678

IVR Amazon Connect

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Steve Hancock; Michael Barillas
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/12/2020	1.0	Initial design for Review	HancockS

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1 OVERVIEW

Currently the C-IV outbound Interactive Voice Response (IVR) campaigns are using the Cisco Unified Contact Center Enterprise (UCCE) to contact customers via phone call. C-IV will be transitioning its IVR system to use Amazon Connect platform to contact customers via phone calls. C-IV's outbound campaigns include appointment reminders, and missing 'Balderas', 'MSR', 'QR7' documents.

1.1 Current Design

The Regional Contact Center IVR is on the Cisco UCCE platform. C-IV communicates with the Cisco UCCE platform using flat files containing a customer's first name, last name, phone number and appointment id or document id.

CIV Outbound Campaigns

- **Appointment Reminder**
    o Campaign Description: CIV system generates a daily file containing a list of customers who are to be notified of their appointments. The file generated contains a customer's phone number, appointment id, first name, and last name.
    o Customer will receive a reminder for the following types of scheduled appointments: 'Meeting with Worker', 'Group Meeting', 'Phone Interview', 'Intake Interview', 'Reevaluation Interview', 'Counselor Meeting', 'CW/CF Reevaluation Interview', 'CW/CF Telephone Interview', 'WTW 24 Month Interview'
    o Campaign applies to all 39 C-IV counties

- **Missing Balderas Document Reminder**
    o Campaign Description: CIV system generates a monthly file containing a list of customers who will be notified of their missing Balderas document. The file generated contains a customer's phone number, first name, last name, and the generated document ID.
    o Campaign applies to all 39 C-IV counties

- **Missing MSR Document Reminder**
    o Campaign Description: CIV system generates a monthly file containing a list of customers who will be notified of their missing MSR document (MC 239X). The file generated contains a customer's phone number, first name, last name, and the generated document ID.
    o Campaign applies to all 39 C-IV counties

- **Missing QR7 Document Reminder**
    o Campaign Description: CIV system generates a monthly file containing a list of customers who will be notified of their missing QR7 document (NA960X & NA960X SAR). The file generated contains a customer's phone number, first name, last name, and the generated document ID.

o   Campaign applies to all 39 C-IV counties

1.2   Requests

Modify the four C-IV IVR outbound campaigns to communicate with Amazon Connect.

1.3   Overview of Recommendations

- Modify the four existing IVR Outbound Interfaces file generation process with an API call to Amazon Connect.

1.4   Assumptions

1. CIV-103677 will recreate the existing Call Flow in the Amazon Connect environment.
2. Amazon Connect will be capable of receiving API calls prior to release.

2   RECOMMENDATIONS

Modify the IVR Appointment/IVR Missing Document Interface's file generation process with an API call to Amazon Connect.

2.1   C-IV to Amazon Connect

2.1.1   Overview

Modify the IVR Appointment/IVR Missing Document Interface's to generate a CSV file and transfer it into an Amazon S3 server. Modify the existing FTP to accommodate the new protocol for Amazon S3.

2.1.2   Description of Change

The following data elements are collected and sent to IVR for the 'Appointment Reminder Outbound Campaigns' (POxxM300).

Data Element	Data Type	Format / Logic / Values	Required	Description
Outbound Call Type	String	'Appointment'	Yes	Campaign Identifier
County Code	Number	n/a	Yes	County Code
appointmentID	Number	n/a	Yes	Unique identifier for Customer Appointment
First Name	String	n/a	Yes	Participants First Name
Last Name	String	n/a	Yes	Participants Last Name
Phone Number	Number	Format: ##########	Yes	Participants Phone Number

The following data elements are collected and sent to IVR for the 'Missing Balderas Reminder Outbound campaigns' (POxxM304), 'Missing MSR Reminder Outbound campaigns' (POxxM306), and 'Missing QR7 Reminder Outbound campaigns' (POxxM302).

Data Element	Data Type	Format / Logic / Values	Required	Description
Outbound Call Type	String	'MSR' / 'Balderas' / 'QR7'	Yes	Campaign Identifier

County Code	Number		Yes	County Code
documentID	Number	n/a	Yes	Unique identifier for Generate Doc
First Name	String	n/a	Yes	Participants First Name
Last Name	String	n/a	Yes	Participants Last Name
Phone Number	Number	Format: ##########	Yes	Participants Phone Number

2.1.3 Execution Frequency

No Change

2.1.4 Key Scheduling Dependencies

No Change

2.1.5 Counties Impacted

All 39 C-IV Counties

2.1.6 Data Volume/Performance

N/A

2.1.7 Interface Partner

Amazon Connect

2.1.8 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc…)

2.2 Inbound Campaign - Outbound Call Status

2.2.1 Overview

Create a new daily batch job to fetch a CSV file from Amazon S3, process the file and journal the records. The CSV file contains information pertaining to the status of outbound calls.

2.2.2 Description of Change

Create a new daily batch job to fetch the 'FileName.CSV' file from Amazon S3, process the records. Create a CTCR to add new Call Status Codes {29, 30, 31, 32, 33, 34, 35}.

Inbound File Layout

Field Name	Field Description
Outbound Call Type	Campaign Identifier
County Code	County Code
appointmentID	Unique identifier for Customer Appointment
First Name	Participants First Name
Last Name	Participants Last Name
Phone Number	Participants Phone Number
Call Status	Call Status code

Call Status Definition

Call Status Result Code	Call Status Short Description	Call Status Long Description
8	Customer phone did not answer	Customer phone did not answer
10	Customer answered and was connected	Customer answered and was connected
24	Number successfully contacted but reached the wrong person	Number successfully contacted but reached the wrong person
29	Not able to Connect to Customer phone.	Not able to connect to customer phone.
30	Customer connected and confirmed appointment.	Customer connected and confirmed appointment.
31	Customer connected and attempted to confirm appointment.	Customer connected and attempted to confirm appointment due to error.

32	Customer connected and canceled appointment.	Customer connected and canceled appointment.
33	Customer connected and attempted to cancel appointment.	Customer connected and attempted to cancel appointment, but failed to authenticate.
34	Customer connected and successfully requested document.	Customer connected and successfully requested document be resent to their address on file.
35	Customer connected and requested document to be resent, but failed.	Customer connected and requested document to be resent, but failed due to an error.

2.2.3 Execution Frequency
Daily

2.2.4 Key Scheduling Dependencies
N/A

2.2.5 Counties Impacted
All 39 C-IV Counties

2.2.6 Data Volume/Performance
N/A

2.2.7 Interface Partner
N/A

2.2.8 Failure Procedure/Operational Instructions
Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc…)

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.20.1.1	The LRS shall provide for the support of system interfaces and integration necessary for the coordination of services with other federal, State, and COUNTY agencies and other external agencies, for the purposes of reducing paperwork, verification of LRS Data, and preventing the duplication of LRS Data entry.	Currently the C-IV outbound Interactive Voice Response (IVR) campaigns are using the Cisco Unified Contact Center Enterprise (UCCE) to contact customers via phone call. C-IV will be transitioning its IVR system to use Amazon Connect platform to contact customers via phone calls. The C-IV system in this SCR will update outbound campaigns Appointment Reminders, and Missing 'Balderas', 'MSR', 'QR7' Documents to communicate with the new Amazon Connect platform.

![CalSAWS logo]

California Statewide Automated Welfare System

Design Document

CIV-106137

CCP Enhancements: User Interface Enhancements

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jared Kuester
	Reviewed By	Michael T. Wright, Raji Sanuvala, Danielle Benoit, Darcy Alexander, and Logan Pratt

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
06/26/2020	.1	Initial Revision	Jared Kuester

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1 OVERVIEW

1.1 Current Design

The Call Control Panel (CCP) does not give any indication an action is still being processed. If a supervisor attempts to change the status of an agent on their team, there's no visual representation that the CCP is still attempting to change the status or if the system didn't receive the request. The same issue occurs with the Message of the Day sender application.

1.2 Requests

Add visual indication to the Team Performance Panel and the Message of the Day sender when a process is still running. Also refresh the Team Panel to display the change after it completes, as well as add a message to the Message of the Day panel when the message has successfully sent.

1.3 Overview of Recommendations

1. Add a message to indicate when a Message of the Day has been successfully sent
   a. Add a spinner icon while the "Send" request is processing
   b. Change the button Text to "Sent!" once a successful response is received
      i. Add new pop-up message on Errors
   c. Disable the text box by greying it out for 5 sec – enough time to see the change in MOTD reader
2. Update the Buttons on the Team Performance Panel
   a. Add a spinner icon added to all buttons while the request is processing
   b. Add new Pop-up message on Errors
   c. Update the agent table to refresh on successful response.

1.4 Assumptions

1. Any logic and/or CCP components not mentioned in this SCR will retain its current functionality.

2   RECOMMENDATIONS

2.1   Message of the Day Sender

2.1.1   Overview

The Message of the Day sender gives no indication when the message is still being sent. When a user clicks send, the message stays in the text field, and the button doesn't update either. Without these updates, users will likely click the Send button multiple times, and possibly causing errors.
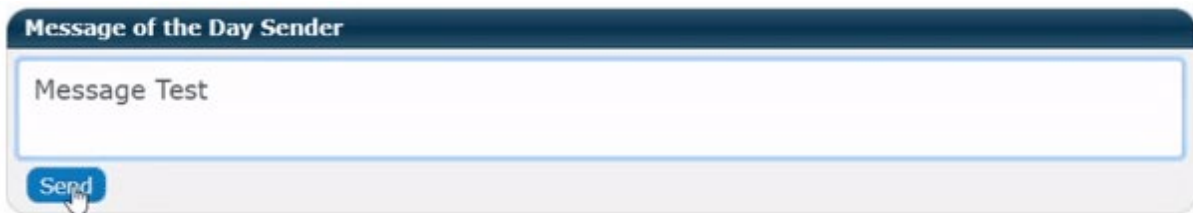
2.1.2   Message of the Day Mockup
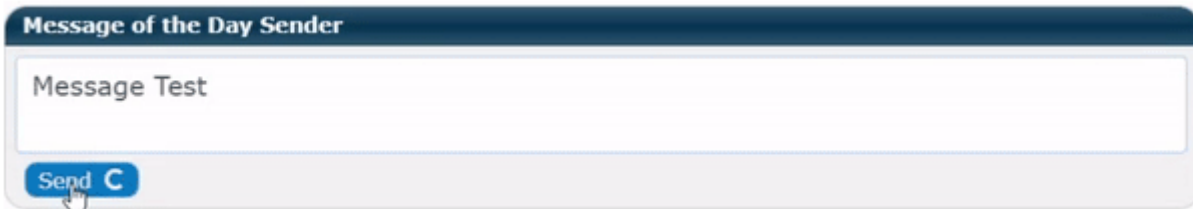

Figure 2.1.1 – Message of the Day Sender Gadget.

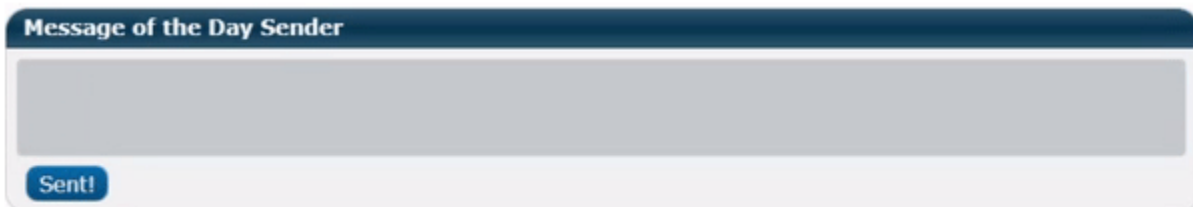**Figure 2.1.2 – Message of the Day Sender Gadget.**

Figure 2.1.3 – Message of the Day Sender Gadget.

2.1.3 Description of Changes

1. Add a message to indicate when a Message of the Day has been successfully sent.
    a. Add a Spinner icon to the Send button when the message is still being processed.
    b. Change the Button Text to "Sent!" after the message has successfully been sent.
        i. If the message fails to send, display an error message.
    c. Disable the text field for 5 seconds after the message has successfully sent and clear the message that was sent from the text field.

2.1.4 Page Location

NA

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping

2. Security Groups

Security Group	Group Description	Group to Role Mapping

2.1.6 Page Mapping

No impact to this section.

2.1.7 Page Usage/Data Volume Impacts

No impact to this section.

2.2 Team Performance Panel

2.2.1 Overview

The Team Performance Panel gives no visual indication that the selected is still being processed. When a supervisor clicks, Ready, Not Ready, or Sign Out nothing happens until the process completes. This can cause issues if the Supervisor believes that the action is taking too long and they'll press the button again, and an error message is received. Also, once the action is complete, the agent list isn't updated right away to indicate that the action is complete.

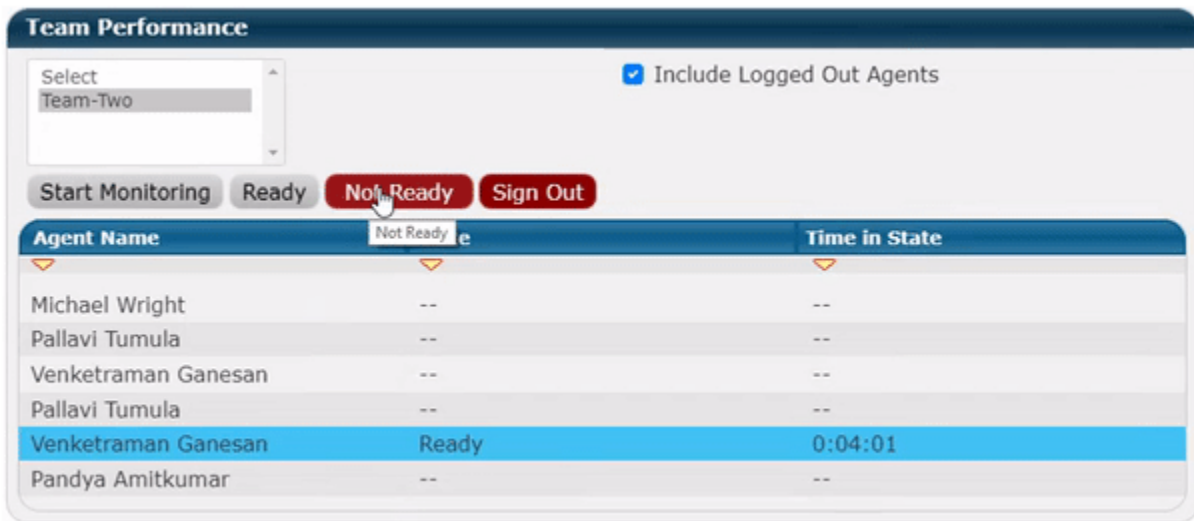### 2.2.2 Team Performance Panel Mockup

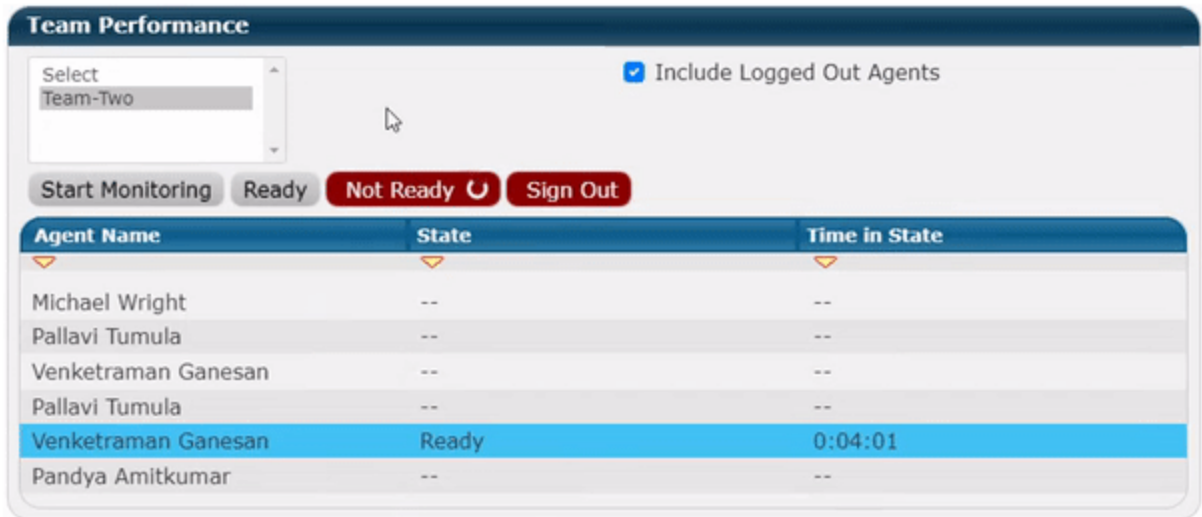**Figure 2.2.1 – Team Performance Panel.**

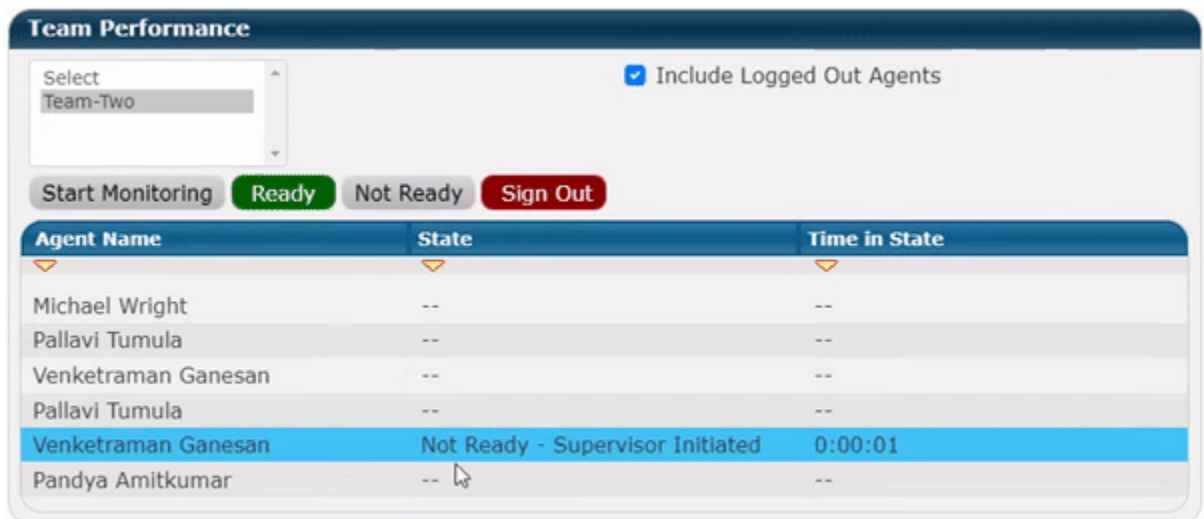**Figure 2.2.2 – Team Performance Panel.**

Figure 2.2.3 – Team Performance Panel.

2.2.3 Description of Changes

1. Update the Ready, Not Ready, and Sign Out Buttons to indicate an action is still processing.
   a. Add a Spinner icon to the Ready, Not Ready, and Sign Out button when a request is still being processed.
      i. If the request fails to complete, display an error message.
   b. Update the Agent Table to Refresh after an action has successfully completed, so Supervisors can confirm that the action completed successfully.

2.2.4 Page Location

NA

2.2.5 Security Updates

3. Security Rights

Security Right	Right Description	Right to Group Mapping

4. Security Groups

Security Group	Group Description	Group to Role Mapping

2.2.6 Page Mapping

No impact to this section.

2.2.7 Page Usage/Data Volume Impacts

No impact to this section.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment

4   REQUIREMENTS

4.1   Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2   Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5   MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

6   OUTREACH

7   APPENDIX