CalSAWS

California Statewide Automated Welfare System

Design Document

CIV-102275

Convert the Engagement and Longitudinal Analysis Reports in Business Intelligence to be On-Request Reports

	DOCUMENT APPROVAL HISTORY	
CalSAWS	Prepared By	Esequiel Herrera-Ortiz
	Reviewed By	Justin Dobbs

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
02/18/2020	1.0	Initial Revision	Esequiel Herrera-Ortiz
03/13/2020	1.1	Added the As of Date field to the parameter page and report header.	Esequiel Herrera-Ortiz
03/16/2020	1.2	Updated section 1.2 and 2.1.1 verbiage per analyst input.	Esequiel Herrera-Ortiz
08/12/2020	2.1	• The Summary sheet in the Engagement and Longitudinal Report were updated to remove excessive hyperlinks due to performance issue. • Added note to clarify that the Engagement Status and Engagement Status Reason parameters are now single select value parameters.	Esequiel Herrera-Ortiz

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1 OVERVIEW

The purpose of this SCR is to outline the process in which the Engagement and Longitudinal Analysis Reports will be converted from Business Intelligence reports to On-Request reports.

1.1 Current Design

The Engagement and the Longitudinal Analysis reports are Business intelligence reports found under the WPR and Engagement Dashboard in the Engagement Analysis tab. These reports have work participation rate statistics and engagement information. The reports display summary counts which can then be drilled down to case level information.

Engagement Report – Displays comparative engagement at different points of time. The report displays a count of the number of people engaged by WTW status and activity status.

Longitudinal Report – Displays engagement information for a filtered set of people over a period like the Engagement Report, however this report tracks the same group through time as opposed to a different group at different points in time.

1.2 Requests

1. Convert the Engagement and Longitudinal reports into traditional On-Request reports. This will make the reports more easily accessible by reducing the amount of clicks needed to access the report.

1.3 Overview of Recommendations

1. Implement On-Request parameter pages for the two reports.
2. Modify the report template as needed to function as On-Request reports.
3. Deactivate the Engagement Analysis tab within the WPR and Engagement Dashboard.

1.4 Assumptions

1. The Engagement Analysis tab in the WPR and Engagement dashboard, which is made inaccessible in this SCR, will not be ported over to CalSAWS.
2. The multi select parameter for Engagement Status and Engagement Status Reason will be reintroduced when the report is converted to the new Qlik reporting tool in CA-216625. For the On Request version of the report a user can manually apply filters in the detail sheet which will satisfy the need to filter through the data.

2 RECOMMENDATIONS

The Business Intelligence Engagement and Longitudinal Analysis reports will be converted to On-Request reports. New templates will be created to read from the existing data set. New On-Request parameter pages will be created for the reports.

2.1 Engagement Report

2.1.1 Overview

The Engagement Report will be converted to an On-Request report. Due the difference in the reporting tool, there will be some differences in the template design. The underlying data and processing will remain the same. All historical data will remain available.

2.1.2 Engagement Report Mockup

Engagement Report

Engagement Status:	Engagement Status Reason:	WPR Sample:	Include Safety Net:
All	All	No	Yes

	Base Date 01/01/2019	%	Comp Date 1 02/01/2019	%	Diff	Comp Date 2 03/01/2019	%	Diff	Comp Date 3 04/01/2019	%	Diff	01/01/2019 - 02/01/2019 Average	%
Total Programs	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Exempt	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
60 years of age or Older	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Aided Non-parent Relative caring for at risk child	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Care of 2 or More Children Under Age 6	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Care of Child Age 12-23 Months	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Care of a child 23 months or younger	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Care of First Child	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Care of Subsequent Child(ren)	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Cares for HH Member Mental/Physically Impaired	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Federal Soc Sec Disability Ins	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Non-Parent Caring for Disabled HH Member	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Parent Caring for Disabled HH Member	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Physically/Mentally Incapacitated	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Pregnant and Doctor states unable to work	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Exempt but Engaged	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Not on Aid	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Pending	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Engageable	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
SIP	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Non SIP	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Participating	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Qualified Activities	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Employment	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Other Work	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Vocational Education	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Job Readiness	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Non-Core Activities	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Non Qualified Activities	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Treatment/Counseling	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Education	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
In Process	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Enrolled, Pending Start	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Assessment/Appraisal	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Good Cause	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Caring for family member	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Difficult pregnancy	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Domestic violence	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Lack of supportive services	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Legal Difficulties	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Mental health	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
No Child Care Available	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
No Child Care Transportation Available	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
No Stage 1 Available for Other Reasons	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
No transportation	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Other Substantial & Compelling Reasons	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Second Parent	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Substance abuse	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Verified illness < 30 days	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Non Compliance	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
In Conciliation	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
In process of curing sanction	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Not accepting a job	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Not participating in activity	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Not providing proof of satisfactory progress in assigned activity	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Not signing the WtW plan	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Quitting a job	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Reducing their earnings	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Sanctioned	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%
Unengaged	0	0%	0	0%	0	0	0%	0	0	0%	0	0	0%

Figure 2.1.2-1 – Engagement Report Summary Sheet Mockup

Figure 2.1.2-2 – Engagement Report Detail Sheet Mockup

2.1.3 Description of Change

1. Create a template for the Engagement Report that reflects the OBIEE dashboard. Please see the attached Engagement Report mockup in the Supporting Documents section for reference.
   a. Each sheet will have a header which displays the following information:
   Line 1: Displays the system logo followed by the report title.
   Line 2: The county for which the report was generated for.
   Line 3: The run date in which the report was generated.
   Format:
   Run Date: MON-DD-YY HH:MM AM/PM
   Line 4: Displays the date the report's data was last refreshed.
   Format:
   As of Date: MM/DD/YYYY
   b. The report will have the following sheets:
   i. Summary (Sheet1): The summary sheet will mimic the Business Intelligence – WPR and Engagement Dashboard – Engagement Analysis tab – Engagement Analysis report summary page.
      1. The Summary sheet will have the following differences from the Business Intelligence report:
         a. Only the Total Programs count totals will hyperlink to the detail data. The data will not be filtered based on the hyperlink selected like in the Business Intelligence report. Excel filters can be used to achieve the same functionality.
         b. All totals will now have a hyperlink.
         c. A section has been added to the top of the Summary Sheet which will display the following parameter:

- Engagement Status – The engagement Status parameter used to generate the report. If no value is selected 'All' will be displayed.
- Engagement Status Reason – The engagement Status Reason parameter used to generate the report. If no value is selected 'All' will be displayed.
- WPR Sample – The WPR Sample parameter used to generate the report.
- Include Safety Net - The Safety Net parameter used to generate the report.

 d. The layout will be updated to adhere to reporting standards.

ii. Base Date (Sheet2) / Comparison Date 1 (Sheet3) / Comparison Date 2 (Sheet4) / Comparison Date 3 (Sheet5): Displays the case level information for the corresponding data presented on the Summary sheet.

 1. The report will have the following differences from the Business Intelligence report:

  a. The Engagement Status column value will not change depending on the hyperlink used in the Summary sheet. Instead the column will display the lowest level subset status in the Status / Status Reason hierarchy.
Please see Appendix 7.1 for status hierarchy.
Please see appendix 7.2 for an example of the functional difference.

  b. Rearrange the column order as presented on the attached mockup.

  c. Remove the Date column and replace it with a date field above the Case Number column.
Format:
Date: MM/DD/YYYY

  d. Rename the WTW Worker column to Worker Number.

  e. Rename the SIP column to SIP Indicator.

  f. Rename the Total Number of Unique People total to Distinct Persons and move the total to the top left of the sheet.

g. Add a dynamic total to the top right of the sheet which will display the record count visible on the detail sheet.

h. The layout will be updated to adhere to reporting standards.

iii. Comparison Range (Sheet6) – Displays the case level information for the data presented on the Summary sheet for the Comparison Range column.

1. The report will have the following differences from the Business Intelligence report:

a. The Engagement Status column value will not change depending on the hyperlink used in the Summary sheet. Instead the column will display the lowest level subset status in the Status / Status Reason hierarchy.

For example, in the Business Intelligence version of the report, a program with a 'Caring for a family member' status can display 'Good Cause' or it's subset value of 'Caring for a family member In Process' depending on the link used to navigate to the case list. Now the record will only display 'Caring for a family member' since it's the lowest rank status in the hierarchy Please see Appendix 7.1 for status hierarchy.
Please see appendix 7.2 for an example of the functional difference.

b. Rearrange the column order as presented on the attached mockup.

c. Rename the WTW Worker column to Worker Number.

d. Rename the SIP column to SIP Indicator.

e. Rename the Total Number of Unique People total to Distinct Persons and move the total to the top left of the sheet.

f. Add a dynamic total to the top right of the sheet which will display the record count visible in the detail sheet.

g. Add a Date Range field above the Case Number column which will display the range dates selected.
Format:
Date Range: MM/DD/YYYY – MM/DD/YYYYY

h. The layout will be updated to adhere to reporting standards.

2. The report will have the following parameter page:

Note: The asterisks (*) depict required fields.

Parameter Name	Description
Base Date: *	Provides the base engagement information for the date selected.
Comparison Date 1:	Provides the first comparison engagement information for the date selected.
Comparison Date 2:	Provides the second comparison engagement information for the date selected.
Comparison Date 3:	Provides the third comparison engagement information for the date selected.
Comparison Range Begin:	Provides the start date for which the engagement view will be averaged out against. If no Comparison Range End date is provided, then the Comparison Range Begin date will be disregarded.
Comparison Range End:	Provides the end date for which the engagement view will be averaged out against. If no Comparison Range Begin date is provided, then the Comparison Range End date will be disregarded.

Organization Level: *	A dropdown parameter that filters the data by an organization level. Options: • County – Filters the data to the county level. • Office – Filters the data to the office level. • Unit – Filters the data to the unit level. • Worker - Filters the data to the worker level. • Case - Filters the data to the case level.
Organization Number: *	Allows the user to select an available option from the Organization Level selected.
Organization Name: *	Displays the organization name selected.
Engagement Status:	A dropdown parameter that filters the data by a specific Engagement status. The drop down will exclude deregistered statuses. Options: • Assessment/Appraisal • Employment • Enrolled, Pending Start • Exempt • Exempt but Engaged • Good Cause • Job Readiness • Non Compliance • Non-Core Activities • Not on Aid • Other Work • Pending • Sanctioned • Treatment • Unengaged • Vocational Education If no value is selected, then the data will not be filtered by an engagement status.

Engagement Status Reason:	A dropdown parameter that filters the data by a specific engagement status reason. The drop down will exclude deregistered status reasons. Options: 60 years of age or older - Aided Non-parent Relative caring for at risk child - Care of 2 or More Children Under Age 6 - Care of Child Age 12-23 Months - Care of First Child - Care of Subsequent Child(ren) - Care of a child 23 months or younger - Cares for HH Member Mentally/Physically Impaired - Caring for family member - Caring for family member - Difficult pregnancy - Domestic violence - Federal Soc Sec Disability Ins (SSDI) - In Conciliation - In process of curing sanction - Lack of supportive services - Legal Difficulties - Mental health - No Child Care Available - No Child Care Transportation Available - No Stage 1 Available for Other Reasons - No transportation - Non-Parent Caring for Disabled HH Member - Not accepting a job - Not participating in activity - Not providing proof of satisfactory progress in assigned activity - Not signing the WtW Plan - Other Substantial & Compelling Reasons

	- Parent Caring for Disabled HH Member - Physically/Mentally Incapacitated - Pregnant and Doctor states unable to work - Quitting a job - Reducing their earnings - Second Parent - Substance abuse - Verified illness < 30 days If no value is selected, then the data will not be filtered by an engagement status reason. ==*Note: In the On-Request version of the report only one Engagement Status Reason option can be selected at a time.==
WPR Sample:	For counties that opted into E2Lite, this dropdown parameter is used to filter the data to the WPR sample. Options: - Yes – The data is filtered to the counties' sample data. - No – The counties' entire Universe data is queried. The default value of this parameter should be No.
Include Safety Net:	A dropdown parameter that determines whether to include Safety Net programs. Options: - Yes – The search will include individuals not on CalWORKs but active on WTW. - No – The search will exclude individuals not on CalWORKs but active on WTW. The default value for this parameter should be set to No.
As of Date:	Displays the date the report's data was last refreshed. Format: As of Date: MM/DD/YYYY

3. The Report should read from the existing Business Intelligence data warehouse.
4. The updates made to the Engagement Report will not affect the record count.
   *Technical Note the On Request report's Summary counts should match the old Business Intelligence report's Summary counts if generating on the same date and for the same parameters. There will not be any changes made to the report logic, we will use the existing data model logic.

2.1.4 Report Location

- **Global: Reports**
- **Local: On Request**
- **Task: Employment Services**
- **Title: Engagement Report**
- **Description: The Engagement Report provides engagement information at different points in time.**

2.1.5 Counties Impacted

All counties will be impacted by the changes outlined in this section.

2.1.6 Security Updates

1. Assign the ESWorkerDashboardView security right to the Engagement Report. Assign the ESWorkerDashboardView security right to the ESSupervisor Dashboard View security group. Individuals with existing rights to view the Engagement Analysis reports in Business Intelligence will be able to view the On-Request version of the report automatically.

Security Right	Right Description	Right to Group Mapping
ESWorkerDashboardView	Business Intelligence WPR and Engagement Dashboard;	ES Supervisor Dashboard View

2.2 Longitudinal Report

2.2.1 Overview

The Longitudinal Report will be converted to an On-Request report. Due the difference in reporting tool there will be some differences in the template design. The underlying data and processing will remain the same.

2.2.2 Longitudinal Report Mockup

Longitudinal Report

Butte
Run Date: JUN-30-19 05:53 PM
Organization: COUNTY Butte
As of Date: 03/13/2020

Engagement Status:	Engagement Status Reason:		WPR Sample:	Include Safety Net:		
All	All		No	Yes		

	Base Date 01/01/2019	%	Comp Date 1 02/01/2019	%	Diff	Comp Date 2 03/01/2019	%	Diff	Comp Date 3 04/01/2019	%	Diff
Total Programs	0	0%	0	0%	0	0	0%	0	0	0%	0
Exempt	0	0%	0	0%	0	0	0%	0	0	0%	0
60 years of age or Older	0	0%	0	0%	0	0	0%	0	0	0%	0
Aided Non-parent Relative caring for at risk child	0	0%	0	0%	0	0	0%	0	0	0%	0
Care of 2 or More Children Under Age 6	0	0%	0	0%	0	0	0%	0	0	0%	0
Care of Child Age 12-23 Months	0	0%	0	0%	0	0	0%	0	0	0%	0
Care of a child 23 months or younger	0	0%	0	0%	0	0	0%	0	0	0%	0
Care of First Child	0	0%	0	0%	0	0	0%	0	0	0%	0
Care of Subsequent Child(ren)	0	0%	0	0%	0	0	0%	0	0	0%	0
Cares for HH Member Mental/Physically Impaired	0	0%	0	0%	0	0	0%	0	0	0%	0
Federal Soc Sec Disability Ins	0	0%	0	0%	0	0	0%	0	0	0%	0
Non-Parent Caring for Disabled HH Member	0	0%	0	0%	0	0	0%	0	0	0%	0
Parent Caring for Disabled HH Member	0	0%	0	0%	0	0	0%	0	0	0%	0
Physically/Mentally Incapacitated	0	0%	0	0%	0	0	0%	0	0	0%	0
Pregnant and Doctor states unable to work	0	0%	0	0%	0	0	0%	0	0	0%	0
Exempt but Engaged	0	0%	0	0%	0	0	0%	0	0	0%	0
Not on Aid	0	0%	0	0%	0	0	0%	0	0	0%	0
Pending	0	0%	0	0%	0	0	0%	0	0	0%	0
Engageable	0	0%	0	0%	0	0	0%	0	0	0%	0
SIP	0	0%	0	0%	0	0	0%	0	0	0%	0
Non SIP	0	0%	0	0%	0	0	0%	0	0	0%	0
Participating	0	0%	0	0%	0	0	0%	0	0	0%	0
Qualified Activities	0	0%	0	0%	0	0	0%	0	0	0%	0
Employment	0	0%	0	0%	0	0	0%	0	0	0%	0
Other Work	0	0%	0	0%	0	0	0%	0	0	0%	0
Vocational Education	0	0%	0	0%	0	0	0%	0	0	0%	0
Job Readiness	0	0%	0	0%	0	0	0%	0	0	0%	0
Non-Core Activities	0	0%	0	0%	0	0	0%	0	0	0%	0
Non Qualified Activities	0	0%	0	0%	0	0	0%	0	0	0%	0
Treatment/Counseling	0	0%	0	0%	0	0	0%	0	0	0%	0
Education	0	0%	0	0%	0	0	0%	0	0	0%	0
In Process	0	0%	0	0%	0	0	0%	0	0	0%	0
Enrolled, Pending Start	0	0%	0	0%	0	0	0%	0	0	0%	0
Assessment/Appraisal	0	0%	0	0%	0	0	0%	0	0	0%	0
Good Cause	0	0%	0	0%	0	0	0%	0	0	0%	0
Caring for family member	0	0%	0	0%	0	0	0%	0	0	0%	0
Difficult pregnancy	0	0%	0	0%	0	0	0%	0	0	0%	0
Domestic violence	0	0%	0	0%	0	0	0%	0	0	0%	0
Lack of supportive services	0	0%	0	0%	0	0	0%	0	0	0%	0
Legal Difficulties	0	0%	0	0%	0	0	0%	0	0	0%	0
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Non Compliance	0	0%	0	0%	0	0	0%	0	0	0%	0
In Conciliation	0	0%	0	0%	0	0	0%	0	0	0%	0
In process of curing sanction	0	0%	0	0%	0	0	0%	0	0	0%	0
Not accepting a job	0	0%	0	0%	0	0	0%	0	0	0%	0
Not participating in activity	0	0%	0	0%	0	0	0%	0	0	0%	0
Not providing proof of satisfactory progress in assigned activity	0	0%	0	0%	0	0	0%	0	0	0%	0
Not signing the WtW plan	0	0%	0	0%	0	0	0%	0	0	0%	0
Quitting a job	0	0%	0	0%	0	0	0%	0	0	0%	0
Reducing their earnings	0	0%	0	0%	0	0	0%	0	0	0%	0
Sanctioned	0	0%	0	0%	0	0	0%	0	0	0%	0
Unengaged	0	0%	0	0%	0	0	0%	0	0	0%	0

Figure 2.2.2-1 – Longitudinal Report Summary Sheet Mockup

Figure 2.2.2-2 – Longitudinal Report Detail Sheet Mockup

2.2.3 Description of Change

1. Create a template for the Longitudinal Report that reflects the OBIEE dashboard. Please see the attached Longitudinal Report Mockup in the Supporting Documents section for reference.
    a. Each sheet will have a header which displays the following information:
    Line 1: Displays the system logo followed by the report title.
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    b. The report will have the following sheets:
        i. Summary (Sheet1): The summary sheet will mimic the Business Intelligence – WPR and Engagement Dashboard – Engagement Analysis tab – Longitudinal Analysis report summary page.
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                a. Only the Total Programs count totals will hyperlink to the detail data. The data will not be filtered based on the hyperlink selected like in the Business Intelligence report. Excel filters can be used to achieve the same functionality.
                b. All totals will now have a hyperlink.

c. A section has been added to the top of the Summary Sheet which will display the following parameter:
- Engagement Status – The engagement Status parameter used to generate the report. If no value is selected 'All' will be displayed.
- Engagement Status Reason – The engagement Status Reason parameter used to generate the report. If no value is selected 'All' will be displayed.
- WPR Sample – The WPR Sample parameter used to generate the report.
- Include Safety Net - The Safety Net parameter used to generate the report.

d. The layout will be updated to adhere to reporting standards.

ii. Base Date (Sheet2) / Comparison Date 1 (Sheet3) / Comparison Date 2 (Sheet4) / Comparison Date 3 (Sheet5): Displays the case level information for the corresponding data presented on the Summary sheet.

1. The report will have the following differences from the Business Intelligence report:

a. The Engagement Status column value will not change depending on the hyperlink used in the Summary sheet. Instead the column will display the lowest level subset status in the Status / Status Reason hierarchy.

For example, in the Business Intelligence version of the report, a program with a 'Caring for a family member' status can display 'Good Cause' or it's subset value of 'Caring for a family member In Process' depending on the hyperlink used to navigate to the case list. Now the record will only display 'Caring for a family member' since it's the lowest rank status in the hierarchy
Please see Appendix 7.1 for status hierarchy.
Please see appendix 7.2 for an example of the functional difference.

b. Rearrange the column order as presented on the attached.
c. Remove the Date column and replace it with a date field above the Case Number column.
   Format:
   Date: MM/DD/YYYY
d. Rename the WTW Worker column to Worker Number.
e. Rename the SIP column to SIP Indicator.
f. Rename the Total Number of Unique People total to Distinct Persons and move the total to the top left of the sheet.
g. Add a dynamic total to the top right of the sheet which will display the record count visible on the detail sheet.
h. The layout will be updated to adhere to reporting standards.

2. The report will have the following parameter page:

Enter Report Parameters

✱- Indicates required fields

Create Report | Cancel

Base Date: ✱
Comparison Date 1:
Comparison Date 2:
Comparison Date 3:
Organization Level: ✱
Organization Number: ✱
Select

Organization Name: ✱
Engagement Status:
Engagement Status Reason:
WPR Sample:
Include Safety Net:
As of Date: 03/12/2020

Create Report | Cancel

Note: The asterisks (*) depict required fields.

Parameter Name	Description
Base Date: *	Provides the base engagement information for the date selected.
Comparison Date 1:	Provides the first comparison engagement information for the date selected.
Comparison Date 2:	Provides the second comparison engagement information for the date selected.

Comparison Date 3:	Provides the third comparison engagement information for the date selected.
Organization Level: *	A dropdown parameter that filters the data by an organization level. Options: • County – Filters the data to the county level. • Office – Filters the data to the office level. • Unit – Filters the data to the unit level. • Worker - Filters the data to the worker level. • Case - Filters the data to the case level.
Organization Number: *	Allows the user to select an available option from the Organization Level selected.
Organization Name: *	Displays the organization name selected.
Engagement Status:	A dropdown parameter that filters the data by a specific Engagement status. The drop down will exclude deregistered statuses. Options: • Assessment/Appraisal • Employment • Enrolled, Pending Start • Exempt • Exempt but Engaged • Good Cause • Job Readiness • Non Compliance • Non-Core Activities • Not on Aid • Other Work • Pending • Sanctioned • Treatment • Unengaged • Vocational Education

	If no value is selected, then the data will not be filtered by an engagement status. *Note: In the On-Request version of the report only one Engagement Status option can be selected at a time.
Engagement Status Reason:	A dropdown parameter that filters the data by a specific engagement status reason. The drop down will exclude deregistered status reasons. Options: 60 years of age or older - Aided Non-parent Relative caring for at risk child - Care of 2 or More Children Under Age 6 - Care of Child Age 12-23 Months - Care of First Child - Care of Subsequent Child(ren) - Care of a child 23 months or younger - Cares for HH Member Mentally/Physically Impaired - Caring for family member - Caring for family member - Difficult pregnancy - Domestic violence - Federal Soc Sec Disability Ins (SSDI) - In Conciliation - In process of curing sanction - Lack of supportive services - Legal Difficulties - Mental health - No Child Care Available - No Child Care Transportation Available - No Stage 1 Available for Other Reasons - No transportation - Non-Parent Caring for Disabled HH Member - Not accepting a job - Not participating in activity - Not providing proof of satisfactory progress in assigned activity

	- Not signing the WtW Plan - Other Substantial & Compelling Reasons - Parent Caring for Disabled HH Member - Physically/Mentally Incapacitated - Pregnant and Doctor states unable to work - Quitting a job - Reducing their earnings - Second Parent - Substance abuse - Verified illness < 30 days If no value is selected, then the data will not be filtered by an engagement status reason. ==*Note: In the On-Request version of the report only one Engagement Status Reason option can be selected at a time.==
WPR Sample:	For counties that opted into E2Lite, this dropdown parameter is used to filter the data to the WPR sample. Options: - Yes – The data is filtered to the counties' sample data. - No – The counties' entire Universe data is queried. The default value of this parameter should be No.
Include Safety Net:	A dropdown parameter that determines whether to include safety net programs. Options: - Yes – The search will include individuals not on CalWORKs but active on WTW. - No – The search will exclude individuals not on CalWORKs but active on WTW. The default value for this parameter should be set to No.
As of Date:	Displays the date the report's data was last refreshed.

| | Format: |
| | As of Date: MM/DD/YYYY |

3. The Report should read from the existing Business Intelligence data warehouse.
4. The updates made to the Longitudinal Report will not affect the record count.
*Technical Note the On Request report's Summary counts should match the old Business Intelligence report's Summary counts if generating on the same date and parameters. There will not be any changes made to the report logic, we will use the existing data model logic.

2.2.4 Report Location

- **Global: Reports**
- **Local: On Request**
- **Task: Employment Services**
- **Title: Longitudinal Report**
- **Description: The Longitudinal Report provides engagement information over a period specified by the user.**

2.2.5 Counties Impacted

All counties will be impacted by the changes outlined in this section.

2.2.6 Security Updates

1. Assign the ESWorkerDashboardView security right to the Longitudinal Report. Assign the ESWorkerDashboardView security right to the ESSupervisor Dashboard View security group. Individuals with existing rights to view the Longitudinal Analysis reports in Business Intelligence will be able to view the On-Request version of the report automatically.

Security Right	Right Description	Right to Group Mapping
ESWorkerDashboardView	Business Intelligence WPR and Engagement Dashboard;	ES Supervisor Dashboard View

2.3 WPR and Engagement Dashboard

2.3.1 Overview

The Engagement Analysis report will be made inaccessible in the WPR and Engagement Dashboard.

2.3.2 ETL Dependencies

The ETL process for the Engagement Analysis page will remain in place because the new On-Request Engagement Report and Longitudinal Report will be reading from this data.

2.3.3 WPR and Engagement Dashboard Mockup
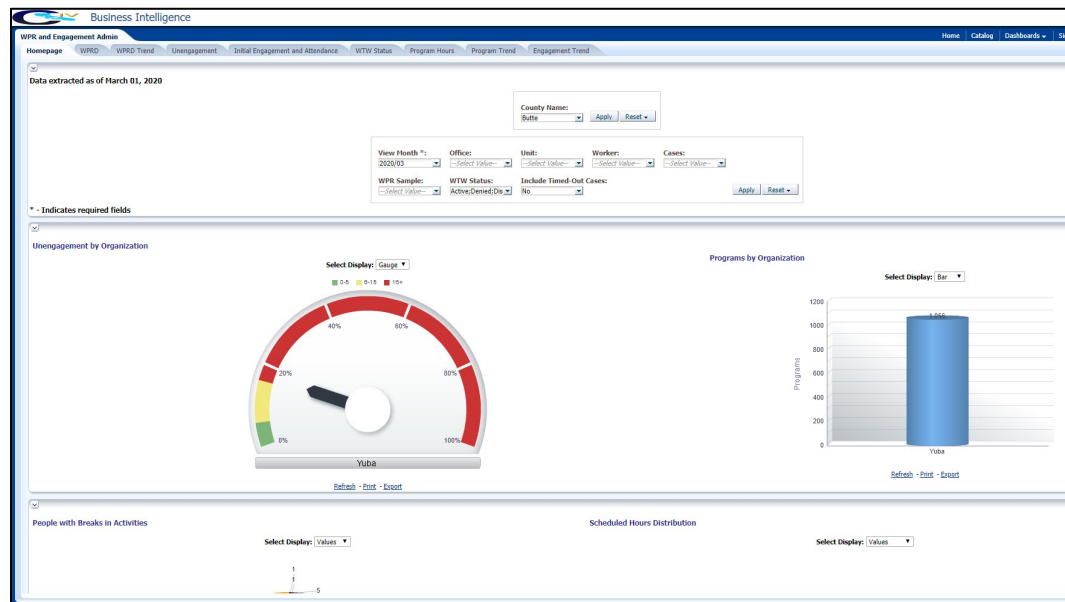
2.3.4 Description of Change

1. Make the Engagement Analysis tab in the WPR and Engagement Dashboard inaccessible.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Reports	Engagement Report Mockup	Engagement Report Mockup.xlsx
2	Reports	Longitudinal Report Mockup	Longitudinal Report Mockup.xlsx
3	Security	Security Matrix	CIV-102275 Security Matrix.xlsx

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

N/A

7 APPENDIX

7.1 Engagement Status Reason Values

Highlighted in yellow are the lowest level engagement statuses which will serve as values for the Engagement Status column in the detail sheets.

L1: Total Programs
L2:   Exempt
L3:   60 years of age or Older
L3:   Aided Non-parent Relative caring for at risk child
L3:   Care of 2 or More Children Under Age 6
L3:   Care of Child Age 12-23 Months
L3:   Care of a child 23 months or younger
L3:   Care of First Child
L3:   Care of Subsequent Child(ren)
L3:   Cares for HH Member Mental/Physically Impaired
L3:   Federal Soc Sec Disability Ins
L3:   Non-Parent Caring for Disabled HH Member
L3:   Parent Caring for Disabled HH Member
L3:   Physically/Mentally Incapacitated
L3:   Pregnant and Doctor states unable to work
L2:   Exempt but Engaged
L2:   Not on Aid
L2:   Pending
L2:   Engageable
L3:   Participating
L4:   Qualified Activities
L5:   Employment
L5:   Other Work
L5:   Vocational Education
L5:   Job Readiness
L5:   Non-Core Activities
L4:   Non Qualified Activities
L5:   Treatment/Counseling
L5:   Education
L3:   In Process
L4:   Enrolled, Pending Start
L4:   Assessment/Appraisal
L4:   Good Cause
L5:   Caring for family member

L5:		Difficult pregnancy
L5:		Domestic violence
L5:		Lack of supportive services
L5:		Legal Difficulties
L5:		Mental health
L5:		No Child Care Available
L5:		No Child Care Transportation Available
L5:		No Stage 1 Available for Other Reasons
L5:		No transportation
L5:		Other Substantial & Compelling Reasons
L5:		Second Parent
L5:		Substance abuse
L5:		Verified illness < 30 days
L4:	Non Compliance	
L5:		In Conciliation
L5:		In process of curing sanction
L5:		Not accepting a job
L5:		Not participating in activity
L5:		Not providing proof of satisfactory progress in assigned activity
L5:		Not signing the WtW plan
L5:		Quitting a job
L5:		Reducing their earnings
L3:	Sanctioned	
L3:	Unengaged	

7.2 Engagement Status in Business Intelligence and on the On Request Report

In the Business Intelligence version of the report, the Engagement Status changes for a single record if one status is a sub status of another. In the below example we see that 'Caring for family member' is a subset of 'Good Cause'.

In Process	1	100%
Enrolled, Pending Start	0	0%
Assessment/Appraisal	0	0%
Good Cause	1	100%
Caring for family member	1	100%

If we drill down to the 'Good Cause' case list, we see the Engagement Status is 'Good Cause'.

Engagement Report Case List

Date	Case	Last Name	First Name	WTW Worker	Engagement Status	SIP	Engagement Status Begin Date
03/11/2020	0000006	Last Name	First Name	02FS000003	Good Cause	N	10/29/2019
				Total Number of Unique People: 1			

If we drill down to the 'Caring for a family member' case list, we see the Engagement Status for the same record is 'Caring for family member'.

Engagement Report Case List

Date	Case	Last Name	First Name	WTW Worker	Engagement Status	SIP	Engagement Status Begin Date
03/11/2020	0000006	Last Name	First Name	02FS000003	Caring for family member	N	10/29/2019
				Total Number of Unique People: 1			

In the On Request version of the report the same record will only display 'Caring for family member' because it is the lowest level subset.

Base Date: 03/11/2020						
Case Number	Last Name	First Name	Worker Number	Engagement Status	Begin Date	SIP Indicator
0000006	Last Name	First Name	04FS000003	Caring for family member	10/29/2019	N

Design Document

SCR CIV-103679 – Migrate Non-Contact Center
County IVRs to Amazon Connect

	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jared Kuester
	Reviewed By	Raji Sanuvala & Pramod Ramesh

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
2/13/2020	1.0	Initial Draft	Jared Kuester

Table of Contents

1   OVERVIEW

Non-Contact Center Counties interactive voice response (IVR) system, is currently hosted on Cisco Customer Voice Portal (CVP) and contact center software will be migrated from the Cisco Unified Contact Center Enterprise (UCCE) to the cloud-based Amazon Connect software as a service (SAAS) contact center.

1.1   Current Design

Currently all phone calls to Non-Contact Center county phone numbers are routed to the Cisco UCCE contact center software. All the software and hardware required to operate the contact center are installed in the C-IV Datacenters.

1.2   Requests

1. Recreate the existing Call Flow (see attached) in the Amazon Connect environment.
2. Recreate all IVR Web Service interactions using AWS Lambda.
3. Create a new export job to populate the RPT_IVR_INBND_STATS table with Inbound Stats.
4. Create a new batch job to process a CSV file containing information about inbound stats and persist the data.

1.3   Overview of Recommendations

1. Recreate the existing Call Flow (see attached) in the Amazon Connect environment.
   a. Create a Amazon Connect Instance for
2. Recreate all IVR Web Service interactions using AWS Lambda.
3. Create a new export job to populate the RPT_IVR_INBND_STATS table with Inbound Stats.
4. Create a new batch job to process a CSV file containing information about inbound stats and persist the data.

1.4   Assumptions

- All existing IVR functionality will carry over from Cisco to Amazon Connect
  - This includes Voice Biometrics, and Self-Service Benefits information.
  - This also includes the new functionality not currently available in Cisco, Professional Voice Talent.

2 RECOMMENDATIONS

2.1 Phone Numbers

2.1.1 Overview

Amazon Connect requires a phone number to route calls to agents. A new phone number can be claimed, or an existing phone number can be ported into Amazon Connect. After claiming a new phone number, or porting an existing phone number you can also choose what kinds of calls you intend to take, either inbound calls, outbound calls, or both.

2.1.2 Description of Changes

The existing phone number 1-877-410-8827 will be migrated from the vendor TPX to Amazon Connect. This is accomplished through a support ticket opened with Amazon.

Once the phone number has been ported to Amazon Connect and associated with our Connect instance, we can choose how that phone number is routed, with Contact Flows.

2.2 Contact Flows

2.2.1 Overview

A contact flow defines the customer experience with a contact center from start to finish. Contact flows have multiple template types to interact with the caller in different manners. For a visual representation of the flows, please see the attachment Visio call flow, CIV-103679 - AWS C33 Detailed Call Flow.

2.2.2 Welcome Contact Flow

When a caller dials 1-877-410-8827 they are directed to the Welcome Contact Flow. If an informational message has been enable through the remote management application, it will be played following the language selection.

2.2.3 CF/MC Info Contact Flow

Callers are first given additional information about CalFresh or MediCal coverage. If they do not wish to hear any of that information, they are sent to the ZIP Code contact flow.

2.2.4 Zip Code Contact Flow

All Non-Contact Center county callers are required to enter their ZIP code before continuing. The ZIP code is used to make routing decisions if they do not authenticate themselves, or wish to hear office hours and locations.

2.2.5 Person Lookup Contact Flow

All callers are directed to the Person Lookup Lambda. Initially the caller's phone number is sent to the IVR Webservice to determine if that phone number is associated with a person that has a voice print. If the Webservice doesn't return anything, they are sent to the General Menu. If the Webservice returns a list of Pers_ID's larger than 0, we first check if the list is larger than 15. We check the size of the BVP list to keep the response time minimal when comparing voice prints. If a caller returns to the person lookup contact flow, the system will attempt to identify the caller with either their social security number or the case number.

2.2.6 General Menu Contact Flow

Callers are directed to the General menu if they do not have a voice print, or they've opted to return to this menu. Callers are offered three options on this page, making a new application, calling about an existing case, listening to office hours and location, and information about the general assistance program.

2.2.7 Login Menu Contact Flow

If callers select the options to indicate they are calling about their existing case, we first check to see if that caller already failed to login with their voice. If that's true we immediately send them to the Collect Case contact flow. If that is not true we give the caller three options, login using their voice, enroll their voice, or login using their case number and IVR PIN.

2.2.8 Voice Login Menu Contact Flow

If a caller selects to login using their voice, they are asked if they would like to enter their case number or social security number. This is used to locate a pers_id to identify what voice print to compare the voice print with.

2.2.9 Collect Voice Contact Flow

If a caller is identified with their phone number by the Person Lookup Lambda, or opted to login with their voice and successfully identified themselves with their case number or social security number the system asks them to speak their passphrase, "my voice is my password, please verify me." The passphrase is streamed to the Nuance Security server to compare the passphrase with

previously enrolled voice prints. If the voice print doesn't match the previously recorded voice prints, they are eventually sent to the General Menu.

2.2.10 Collect Voice Case Lookup Contact Flow

If a caller successfully authenticates with their voice, we check if the Pers_ID that the voice print is associated with is associated with a Non-Contact Center County Case. If the lambda doesn't return an active case, they are sent back to the general menu. If the lambda returns more than one case for that Pers_ID they are asked to enter the Case number they are calling about.

2.2.11 Collect Case Contact Flow

If a caller selects to login with their case number and PIN, we first need to gather their case number to start the login process. After the caller enters their case number the system verifies that they entered seven digits.

2.2.12 Case Validation Contract Flow

If a caller successfully entered seven digits, the system verifies if that is a valid case number. If it is valid, it then checks if the caller came from the Voice Login Menu. If they didn't we send the caller to the collect PIN contact flow.

2.2.13 Collect PIN Contact Flow

Callers are asked to enter their IVR PIN to complete the login process. After they enter their four-digit PIN, the system validates that it's four digits in length, or if they entered a star (*).

2.2.14 Collect DOB Contact Flow

In the event a caller has the same IVR PIN as another member on their case, we require their date of birth to determine which person is calling. Once they enter their date of birth, we validate that it is the correct format before sending it to Login results contact flow.

2.2.15 Collect SSN Contact Flow

If a caller is requesting a new IVR PIN or are attempting to login with their voice and we didn't identify them by their calling phone number, we require they enter their social security number. Once the caller enters their SSN we validate that it's nine digits in length. If the caller presses star indicating they do not have or do not know their SSN, we check if they were requesting a new PIN. If that is true, we send the caller to an agent.

2.2.16 Login Results Contact Flow

Once a caller authenticates with either their voice or with their case number and IVR PIN, we check where to send the caller. If the caller is the primary applicant, or MediCal is active on the case and has a voice print, we send them to the case self-service menu. If a caller successfully authenticates, but are not primary and MediCal is not active, we send the caller to the External Transfer Menu. If the caller authenticates with their case number and IVR PIN, and there is a duplicate PIN on that case, we send the caller to the Collect DOB contact flow. If the caller has failed to login three times, we send them to the External Transfer Menu. If a caller successfully authenticates (primary or not), and they do not have a voice print enrolled, we send them to the Voice Enroll Menu.

2.2.17 Voice Enroll Menu Contact Flow

If a caller opted into enrolling their voice from the login menu contact flow they are informed that they will need their case number and IVR PIN. If they successfully logged in, but did not have a voice print we check if their BVP_Code equals "P". If that is the case, we delete the voice print associated with the pers_id. If their BVP_Code does not match Y or P, the system attempts to delete any possible voice recording for the caller in case they successfully record one or two voice prints, but didn't complete the enrollment process with three recordings.

2.2.18 Voice Enroll Contact Flow

Once a caller opts into enrolling their voice print, we ask them to state the phrase "My voice is my password, please verify me" three times. Between each recording we check the quality of the recording and let the caller know if the recording isn't high enough quality. After a total of six failed attempts, across all recording attempts, the enrollment process is abandoned, and the caller is sent to the next menu.

2.2.19 Office Info Contact Flow

Callers are given information that relates to the ZIP code that the caller entered. They are not prompted again since the caller was required to enter the ZIP code at the beginning of the IVR.

2.2.20 External Transfer Menu Contact Flow

Callers that do not have a case number, or do not know their case number, are transferred to their local county office. The number that the caller is transferred to is based on the ZIP code the caller entered at the start of the IVR.

2.2.21 No PIN Program Menu Contact Flow

When a caller indicates that they are calling about an existing case but does not authenticate, they are given the option to request a new IVR PIN, or to be transferred to their office service center.

2.2.22 New PIN Contact Flow

If a caller selects the option to request a new PIN they are first sent to the Collect SSN contact flow. Once they return from the collect SSN, they system attempts to request a new PIN.

2.2.23 Case Self Service Menu Contact Flow

If a caller successfully authenticates, through their voice or case number and PIN, they are given options to access the self-service options.

2.2.24 Get Dynamic Benefits Menu Contact Flow

This lambda call calculates how many programs are active on the case they logged in with. If only one program is active they are sent to the 3 options menu, to allow the caller to select that program plus option 7 to repeat and option 8 to return to the previous menu. The total number of programs that can be active on a single case that the IVR can play information on is four.

2.2.25 Dynamic Benefits Information Menu Contact Flow

If a caller selects to hear their benefit information, they are sent to a menu to select what program they would like to hear the information for. The menu is dynamic and only offers the caller to listen to programs that the IVR has information for. The dynamic menu will ignore selections that do not match any available selections until after all menu options have been played. There is a two second pause between each menu option where callers can select what they are calling about, but any other selection will just move them to the next menu option. Only on the final selection will it play the No Match prompt.

2.2.26 CalWORKs Benefits Information Contact Flow

If a caller selects to hear their CalWORKs program information, they hear all relevant information on their CalWORKs program. Once played, they are given the option to speak to a worker if they have questions on the information that was given to them.

2.2.27 CalFresh Benefits Information Contact Flow

If a caller selects to hear their CalFresh program information, they hear all relevant information on their CalFresh program. Once played, they are given the option to speak to a worker if they have questions on the information that was given to them.

2.2.28 MediCal Benefits Information Contact Flow

If a caller selects to hear their MediCal program information, they hear all relevant information for all members on the case for their MediCal program. Once played, they are given the option to speak to a worker if they have questions on the information that was given to them.

2.2.29 Welfare to Work Benefits Information Contact Flow

If a caller selects to hear their Welfare to Work program information, they are played the status of the program. The system then checks if there are any pending activities. If there are, they are played, if not the caller is sent to the WTW Reimbursements contact flow.

2.2.30 Welfare to Work Reimbursement Contact Flow

After listening to their program status, the system then checks if callers have any reimbursements to report to the caller. If the they do not have any reimbursements on their case, the caller is sent to the WTW End Menu.

2.2.31 Welfare to Work End Menu Contact Flow

After listening to their welfare to work benefit information, callers are given an option to speak to a worker. If they choose this option the system will determine if the case worker's phone number is available. If it is available the system will transfer the caller to their desk phone. If it is not available it will transfer to a static phone number.

2.2.32 Document Request Contact Flow

If the caller selects the option to request a form, the system will determine how many forms are on file that will be offered. If there are no forms on file they will be sent to the three options menu, as the GEN 2000 form is always able to be requested.

2.2.33 Dynamic Document Request Contact Flow

After determining how many forms are available to be requested, the caller is given an option to request up to three forms, the GEN 2000, the SAR 7, and the TMC status report, depending on how many forms are available. This menu is dynamic and will only play the options available on the case. The dynamic menu will ignore selections that do not match any available selections until after all menu options have been played. There is a two second pause between each menu option where callers can select what they are calling about, but any other selection will just move them to the next menu option. Only on the final selection will it play the No Match prompt.

2.2.34 Document Request Resend Forms Contact Flow

If a caller requests either the SAR 7 or the TMC Status report, the system attempts to resend the selected form to the caller's address on file. If it is successful, the caller is given the option to request another form or return to the case self-service menu. If it fails, the caller is given the options to speak to a worker, or return the case self-service menu.

2.2.35 Document Request GEN 2000 Form Contact Flow

If the caller requests the GEN 2000 to be sent, the system attempts to generate the GEN 2000. If it is successful they inform the user that it will be mailed to their address on file or accessible through C4Yourself.com if their case is associate to their account. They are then given the option to request another form, or return to the case self-service menu. If the request is a failure the caller is given the option to speak to a work, or return to the case self-service menu.

2.2.36 Document Status Contact Flow

If the caller requested to listen to their document status, the system first checks to see if they have any forms on file. If they don't, they are returned to the case self-service menu. If they have greater than zero forms on file, the system checks to see how many they have, then sends it to the correct dynamic menu based on the amount of forms they have.

2.2.37 Dynamic Document Status Contact Flow

If the caller has one or more forms on file, they are given a list of forms to listen to choose from. For the CalFresh, CalWORKs, or CalWORKs CalFresh redetermination packets, only one will ever be given as an option. In the unlikely event that more than one of those three are on the case, the CalWORKs CalFresh redetermination packet takes president. The dynamic menu will ignore selections that do not match any available selections until after all menu options have been played. There is a two second pause between each menu option where callers can select what they are calling about, but any other selection will just move them to the next menu option. Only on the final selection will it play the No Match prompt.

2.2.38 Check Document Status Contact Flow

After the caller selects what documents they want to hear the status of, they are given the information based on what the status of their document is. After the information is played, the caller is given the option to check the status of another document, or speak to a worker. If they wish to speak to a worker, they will be given the exit reason that aligns with the document status they just listened to.

2.2.39 Change PIN Contact Flow

If a user requests to change their IVR PIN from the case self-service menu they are asked to enter a new PIN that meets the security requirements. If the change is successful they are returned to the case self-service menu. If it fails the caller is sent to a worker.

2.2.40 Dynamic Program Menu Contact Flow

Callers that select the option to speak to a Worker, they are prompted to select what program they are calling about. The menu only plays the options based on what programs are active on the case they authenticated with.

2.2.41 CalWORKs Service Menu Contact Flow

If the caller selects the CalWORKs program, they are given the option to be transferred to their case worker, or their local office service center.

2.2.42 CalFresh Service Menu Contact Flow

If the caller selects the CalFresh program, they are given the option to be transferred to their case worker, or their local office service center.

2.2.43 MediCal Service Menu Contact Flow

If the caller selects the MediCal program, they are given the option to be transferred to their case worker, or their local office service center.

2.2.44 Welfare to Work Service Menu Contact Flow

If the caller selects the Welfare to Work program, they are given the option to be transferred to their case worker, or their local office service center.

2.2.45 Case Worker Welcome

When a caller selects to speak to their case worker, they are given all relevant information about their case worker before they are transferred.

2.2.46 Exit Reasons Contact Flow

If the caller requests to speak to a worker, or are directed to a worker for another reason such as an error, it is determined what queue to route the call to based on the exit code. The exit codes are applied throughout all the contact flows right before it sends the caller to the exit reasons contact flow. Exit codes 0088, and 0099 are both released. The remaining exit codes are transferred to external phone numbers.

2.3 Prompts

2.3.1 Overview

Amazon Connect has the option to upload WAV files to play messages to the caller, or use the built in Text-To Speech service. To present a better experience, the Amazon Connect IVR will use pre-recorded wav files for all the prompts, unless the prompt doesn't include a wav file name.

2.3.2 Description of Change

Record all existing prompts from Cisco CVP as wav files, so customers will still receive the same information but in a more understandable manner.

2.3.3 Wav Files

For a complete list of prompts, in both English and Spanish, please reference the attached Excel spreadsheet, Non-Contact Center Verbiage.

2.4 IVR Contact Center Inbound

2.4.1 Overview

Create a new daily batch job to fetch a CSV file from Amazon S3, process the file, and store the data. The CSV file contains information to be used in IVR Contact Center Reporting.

2.4.2 Description of Change

Create a new daily batch job to fetch the 'C90_ctrReports_{MM-DD-YYYY}.csv' file from the Amazon S3 server, process the file and store the data into the 'rpt_ivr_inbnd_stats' table.

Inbound File CSV Columns

Column Names	DataTypes
CountyCode	String
CallStartDate	String {MM-DD-YYYY}
Total	String
ElementName	String
ElementCount	String

2.4.3 Execution Frequency

Daily

2.4.4 Key Scheduling Dependencies

N/A

2.4.5 Counties Impacted

All 39 C-IV Counties

2.4.6 Data Volume/Performance

N/A

2.4.7 Interface Partner

N/A

2.4.8 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   OUTREACH

3.1   N/A

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4   APPENDIX

1. Voice Biometrics will remain in place in the same capacity as it does in Cisco.
    a. Existing Voice Prints will be usable in Amazon Connect without needing to reenroll their voice.
2. Non-Contact Center county's IVR is self-service only. There are no queues and no agents to take calls.

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