

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-227063 - DDID 2703: Contact Center Web  
Chat and Click-to-Call

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
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# 1 OVERVIEW

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This design is for Web Chat and Click-to-Call. Web Chat allows customers to communicate with agents through Amazon Connect based chat messaging. Customers initiate a web chat session from BenefitsCal (CalSAWS Self Service Portal).

Click-to-Call allows the user to request a phone call with an agent. Customers complete an online form that places their call request in a queue. This feature is accessed by customers using BenefitsCal.

Both Web Chat and Click-to-Call are optional features for CalSAWS Contact Center counties and require the county to opt-in to have these features enabled. The link for Click-to-Call and Web Chat is only available to customers on BenefitsCal if the county has enabled these features.

## 1.1 Current Design

SCR CA-207026 migrated the existing C-IV Web Chat and Click-to-Call functionality into CalSAWS and BenefitsCal for those counties that have opted-in to the functionality.

The existing Web Chat utilizes AWS Connect chat between portal customer and agent. Customers initiate a chat from BenefitsCal after entering their name, phone number, and a question. The chat will connect the customer to an agent in the customer's county after an availability check is completed.

For Click-to-Call, the customer has the option to click a 'Call Me' link once they have logged into their portal account. The link opens a form requesting the customer's name and phone number. After an availability check the user's contact information is placed into the Amazon Connect Callback Queue. Once the number reaches the end of the queue AWS connect will send the call to the agent to be accepted. Once the call is accepted, a call to the user is made and if user accepts then the user and agent are connected.

Note: For both Web Chat and Click-to-Call, the system will do an availability check to see if the current time is outside of Call Center hours, a holiday or if there is an emergency office closure after the form is submitted.

## 1.2 Requests

Enable Web Chat and Click-to-Call (Call Me) for the additional Contact Center counties (Los Angeles and CalWIN counties).

## 1.3 Overview of Recommendations

1. Enable Web Chat for additional contact center counties that opt-in and integrate this feature into the Enhanced Call Control Panel.
2. Enable Click-to-Call for additional contact center counties that opt-in and enable callback queues for each county.

## 1.4 Assumptions

1. Web Chat functionality is only available for CalSAWS Contact Center counties.
2. Web Chat and Click-to-Call are not enabled by default. Counties will need to opt into these features to enable the functionality and allow customers to see the links on BenefitsCal.
3. Customers must login to their BenefitsCal account to access the Web Chat link or Click to Call link.

## 2 RECOMMENDATIONS

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### 2.1 Web Chat

#### 2.1.1 Overview

Web Chat will be enabled for additional contact center counties that opt-in to the functionality. Agents will handle Web Chat contacts through the new Enhanced CCP. The Web Chat functionality will be enabled to allow agents to chat with up to two customers at a time.

#### 2.1.2 Description of Change

The current version of Web Chat is integrated with the Default CCP and will be replaced by the Web Chat feature included in the Enhanced CCP. The Web Chat functionality will be enabled in each specified County's Amazon Connect Instance for counties that opt-in to this functionality.

#### 2.1.3 Agent Experience

Agents access Web Chat via the Enhanced CCP with their CalSAWS login credentials. A chat tab will be available in the CCP Menu on the right side of the screen for agents with chat routing profiles assigned. Web Chat will enable agents to transfer chats to another chat queue using the "transfer" button.

Agents can Accept or Reject a chat when in an available status with a pop-up and an audible 'incoming call' notification. Agents can have up to two (2) active chats at a time. If the agent is already in an active chat, the agent will receive a message to accept or reject an additional chat. When an agent receives the first incoming chat an audible 'incoming call' notification is played in the Enhanced CCP, and if there is an additional second incoming chat, the agent will hear an additional audible 'incoming call' notification and the option to accept or reject the incoming chat.

Figure 2.1.3.1: Chat tab on CCP Menu

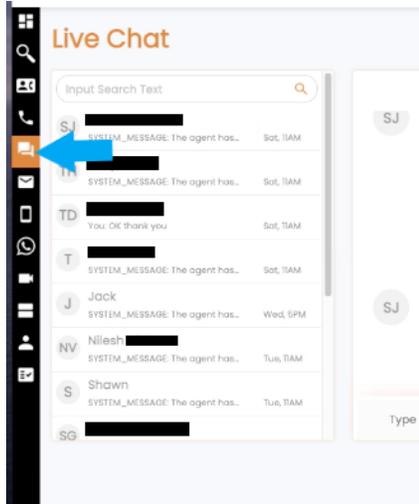


Figure 2.1.3.2: Active Chat with additional Chat Request

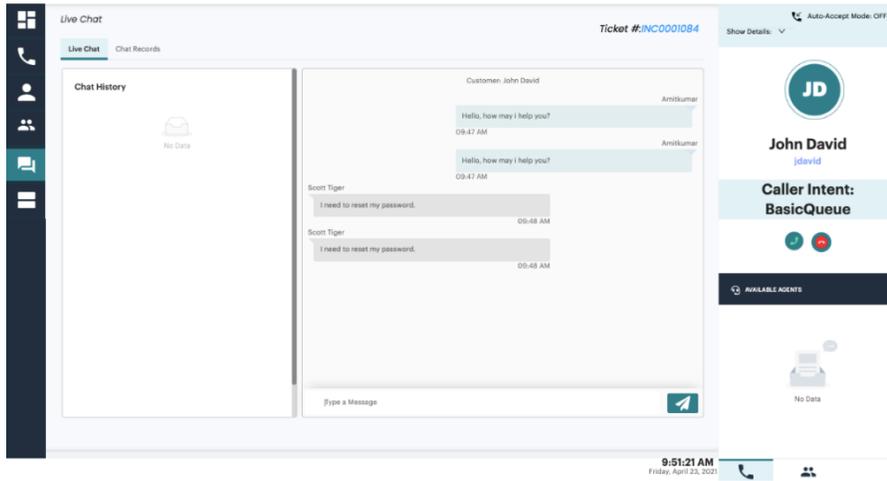


Figure 2.1.3.3: Chat Transfer button

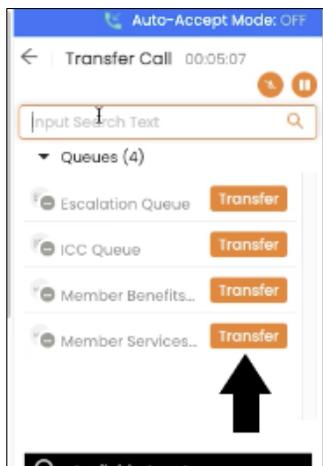
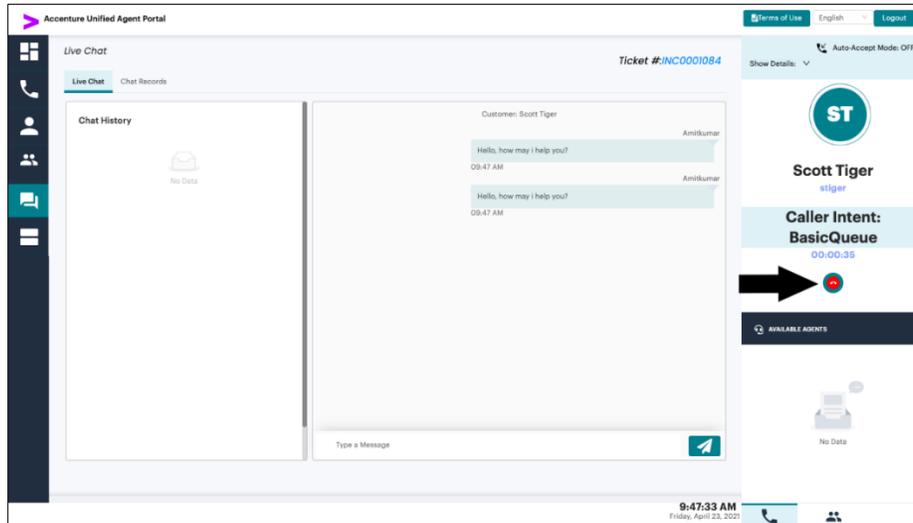


Figure 2.1.3.4: Web Chat End Chat Button



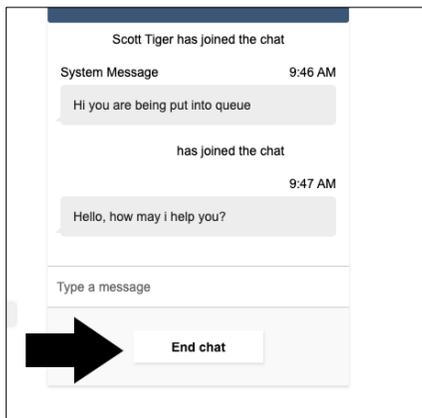
## 2.1.4 Customer Experience

Customers access Web Chat through a link on the BenefitsCal website. Customers are prompted to enter the following before a chat is initiated:

1. Name – This is a required field
2. Phone Number – This is a required field
3. “Your Question” text box – This is an optional field
4. No additional validation is completed on the fields.

Once a chat session is connected, the customer will be able to interact with the agent. The Customer can end the chat by clicking the “End Chat” button or by closing the window.

Figure 2.1.4.1: Customer Chat Window



## 2.2 Click-to-Call

### 2.2.1 Overview

Click-to-Call application will be migrated from C4Yourself to the CalSAWS Statewide system.

### 2.2.2 Description of Change

The link for Click-to-Call will be enabled for LA and CalWIN counties if they opt-in for this feature. The link is displayed in BenefitsCal for enabled counties. When a customer completes the steps to initiate a call, the call will be placed in the call back queue for handling when an agent becomes available.

**Note:** Calls initiated via Click-to-Call are recorded same as any other inbound/outbound call.

### 2.2.4 Customer Experience

When a customer clicks the “Call Me” link from the BenefitsCal website, they are presented a popup with the Name and Phone Number box. The customer is required to enter their phone number in the field. Once the customer has entered their Name and Phone number, they will click the submit button.

## 3 REQUIREMENTS

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### 3.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2703	The CONTRACTOR shall configure the Customer Service Center solution to provide customers with an option to communicate with a case worker using web chat functionality that is initiated from the Statewide Portal. Counties will have the option to opt in or out of this functionality.	WebChat and Click-to-Call are not enabled by default counties will need to opt into these features to enable the functionality	Covered in Sections 2.1 and 2.2

	The CONTRACTOR shall configure the Customer Service Center solution to allow customers an option to enter their number into a callback queue from the Statewide Portal.	None	Covered in Section 2.2
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