CalSAWS

California Statewide Automated Welfare System

Design Document

CA-231234 – DDID 2718 FDS CSC: Task for Cancelling an Appointment in Outbound IVR

CalSAWS	DOCUMENT APPROVAL HISTORY	
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08/11/2021	0.1	Initial Draft	Jared Kuester

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1 OVERVIEW

The automated outbound appointment reminder campaign allows customers to cancel an upcoming appointment that they're not able to attend. When an appointment is canceled, a new task will be created for the worker that the appointment was with.

1.1 Current Design

The existing outbound campaigns allow the customer to cancel their appointment, but a task isn't created automatically. If the user currently cancels their appointment, an e-mail is sent to the worker and a journal entry is made in the case.

1.2 Requests

The CONTRACTOR shall configure the CalSAWS System to create a task when a customer cancels their appointment during a CalSAWS outbound IVR call.

1.3 Overview of Recommendations

1. Create a Task when the customer cancels their appointment through the outbound reminder campaign.

1.4 Assumptions

1. This task can be enabled or disabled through the Administration Page. See SCR CA- 226672 for details.
2. Current e-mail and journaling functionality will remain in place.
3. After an appointment is cancelled successfully, the customer will hear the same message that's played today.

2 RECOMMENDATIONS

This section outlines recommendations to enable automated task creation for outbound call reminders when customers cancel their appointment.

2.1 Task for Cancelling an Appointment

2.1.1 Overview

Automated outbound reminder calls were deployed to all counties with SCR CA-226207, but automated task generation wasn't included. When customers cancel their appointments from the automated outbound campaign reminders, workers need to be notified of this change. Currently they receive an e-mail, but a task will ensure that the worker knows that

they need to reschedule that appointment with the customer to ensure there's no impact to their benefits.

2.1.2 Task Type

1. Create a System task type for each of the 58 counties that will be created when a customer cancels their appointment through outbound IVR call.
2. The task type will have the following elements:
   i.   Name: Appointment Cancelled from Outbound IVR
   ii.   Category: CSC
   iii.   Priority: Medium
   iv.   Available Online: No
   v.   Available for Automation: No
   vi.   Expire Tasks: Yes
   vii.   Expiration Period: 30 days
   viii.   Expiration Type: After Task Creation
   ix.   Newly Assigned Indicator: 5 days
3. The Long Description of the Task will be formatted as "An appointment for case {case number} at {date} {time} has been cancelled."

   Note: This Task Type is considered a "System Task" and will not be editable on the Task Type Detail page.

2.1.3 Task Creation

1. Create a new lambda that the outbound IVR contact flow will interact with to send a new API request to create a new task with the task type defined in Section 2.1.2. This lambda will need to send the following data to create the task using the Task API (for more information about the Task Creation API please see SCR CA-214755 section 2.4.).

   i.   case_num (required)
   ii.   worker_num (required)
   iii.   bank_num (required)
   iv.   pgm (CT 18) (required)
   v.   task_cat_code (CT 10350) (required)
   vi.   task_type_name (required)
   vii.   due_date (required)
   viii.   lang_code (CT 145)
   ix.   long_description

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2718	The CONTRACTOR shall configure the CalSAWS System to create a task when a customer cancels their appointment during a CalSAWS outbound IVR call.	The automated task creation will be defaulted to not enabled.	Create task when customer cancels an appointment.

4 APPENDIX