CalSAWS | Notes from IVR/Contact Center Committee Meeting

Date:	September 8, 2021	**Notes Location:**	Microsoft Teams
Time:	9:00 am – 12:00 pm	**Meeting Called by:**	Darcy Alexander

Attendees:

R1 ☒ Esmeralda Rouse	R4 ☒ Mark McAlister	CS ☐ John Dray
R1 ☒ Martin Lara	R5 ☒ Alma Franco	CS ☒ Charles Heo
R1 ☒ Nancy Rodriguez	R5 ☒ Cori Robertson	CS ☒ Rhiannon Chin
R1 ☒ Monica Castillo	R5 ☒ Corrinne Simpson	CS ☒ Erick Arreola
R1 ☐ Norma Fetters	R5 ☒ Michael Schmidt	CS ☒ Alan Giblin
R2 ☒ Jesse Hallford	R5 ☒ Jason Garrett	CS ☐ Don Coffey
R2 ☐ Shawna Reed	R6 ☒ Andy Nguyen	CS ☐ Carlos Cuenca
R2 ☒ Chris Craig	R6 ☒ Maria Montoya	CS ☐ Julie Conwell –
R2 ☒ Ilda Torrez	R6 ☒ Karina Estrada	RM Sponsor
R2 ☒ Stacy Bruemmer	R6 ☒ Narine Tervartanyan	CS ☒ CDSS
R3 ☒ Danielle Smith	R6 ☒ Jason Reyes	
R3 ☐ Julie Evinger	CS ☒ Jared Kuester	
R3 ☒ Joshua Charlton	CS ☒ Stacey Xiong	
R4 ☐ David Mata	CS ☒ Logan Pratt	
R4 ☒ Alfredo Jimenez	CS ☐ Danielle Benoit	
R4 ☒ Dwight Bristow	CS ☒ Gerald Limbrick	
R4 ☒ Puninder (Roni) Dhillon	CS ☒ Matt Lower	

Notes Taken By: Region # 4 Responsible for Meeting Notes – Kern County - Mark McAlister

Agenda Topic:	Important Points
Welcome/New Members:	• Introduction done for new members
Meeting Notes: • Region 4 Identified as the one responsible for taking notes.	• Region #4 – • Notes are due to the Contact Center Facilitator on September 15, 2021
• **E-Gain Changes:**	• Contact Center Team • Proposed changes to eGain reporting described to the Committee. • This is for the C-IV counties only and these are Global Changes and require regional approval since changes affect all counties. • No current ETA when these will go into production. Once voted on, these changes will be taken back to eGain and once a release date is given from eGain an email to Committee will go out with date changes will be in production.

Agenda Topic:	Important Points
	- Changes will be implemented through a Change Order process since these changes are done by eGain and not us, no SCR required. - Reporting update proposals are as follows: **Real Time Display for Agent Status** - Changing "Lunch" status to "Meeting" status currently does not reset timer. - Changes made to Online State Duration field - Agent Real Time Monitor - Agent Real Time Model **Agent Non-Response Count by Agent** - New metric will align with Amazon Agent Non-Response metric - Impacts - Agent Productivity out of box report - Agent Summary semantic model report "Missed" metric will be removed from Contact Routing summary model "Missed" metric will be left in the Queue Summary and Dialed Number Summary models **Service Level** - eGain and Amazon treat Call Backs differently - Amazon includes customer time to answer or time out - eGain sets queue time to zero for Call Backs - Aligning with Amazon (AWS) Impacts - Semantic models - Reports - Metrics **Abandoned Calls** - Includes calls that are queued, customer requests call back

Agenda Topic:	Important Points

	▪ eGain will exclude the above to bring more in line with AWS
	        ▪ Impacts
	            • Semantic Models
	            • Reports
	    o **Average Hold Time**
	        ▪ eGain will add metric to include both ways of calculating average handle time
	    o Counties will be able to decide which variant to use
	
	Regional Vote taken as changes are Global all Regions voted Yes. The Global updates have been Approved by Regional Vote.

• **C-IV Migration Update for the CSC:** o **IVR Messaging**	• Contact Center Team • Customization for Pre-Migration messaging only • Service Requests were due September 7, 2021 • Migration weekend messaging is not customizable. • There were no questions or comments on this topic.

• **SCR CA-226839 – External Party Access:**
    o **CBO IVR PIN Letter**
	• Contact Center Team
	• Review of SCR including Overview, Recommendations, Supporting Documents & Requirements.
	    o Currently scheduled for 22.01(1/24/2022) Release
	    o DDID – Statewide CalSAWS requirement
	    o C-IV Counties are not able to opt out
	    o Allows external party access (EPA) to IVR PIN
	        ▪ CBOs, other Providers, County Agencies
	    o Functionality will be added to Foster Care, Resource Detail, Money Management Resource Detail pages
	    o Create and Reset PIN functionality

- One common state phone number for external parties to call. Counties will provide a number to which the call will be transferred.
- New EPA Specific Queue
- EPA IVR will only support English language
- Change order would need to be submitted to change prioritization
- Will receive same messaging as regular IVR queue
- EPA caller will be asked to identify county by speaking name or entering county 2-digit code (number). Three chances allowed to identify county.
- New Case IVR PIN letter for EPA will be created
- For counties with no Contact Center, call will be routed to county provided phone number CRFI to be sent to counties requesting phone number.
- Marketing should be at county level
- For CalWIN counties and LA, that have not gone live, calls will be transferred to a static number until they are rolled on to the CalSAWS Contact Center Solution.
- Callers will not be given program choice

- Flow will be updated to request county first and IVR PIN second
- Prioritized over regular IVR calls that have been authenticated

- Regional Vote taken to change the Design and Call Flow for CBO's that are unauthenticated to be directed to the Counties regular IVR instead of being dropped. All Regions to vote on this change. This has been Approved by Regional Vote all Regions voting yes.
- Design Document scheduled to be sent out to the Committee for voting on September 10, 2021, with voting due by Regions on September 24, 2021.

#	Action Item	Assigned To	Assigned Date	Due Date	Status
1	Update Design and Call Flow to show all CalWIN and LA Counties to get a static phone number until they are rolled on to the CalSAWS Contact Center Solution	Jared	9-8-2021	9-10-2021	
2	Update Design Doc and Call Flow to show that Unauthenticated callers will be routed to Counties regular IVR instead of being dropped.	Jared	9-8-2021	9-10-2021	

Next Scheduled Meeting – Teams – October 27, 2021 9:00 AM – 12:00 PM:

Region 5 will be responsible for meeting notes.

Proposed Monthly Meeting Schedule:

Meeting Date	Meeting Time	Cancelled/Scheduled
September 8, 2021	9:00 AM – 12:00 PM	Scheduled
October 27, 2021	9:00 AM – 12:00 PM	Scheduled
November 17, 2021	9:00 AM – 12:00 PM	Scheduled
December 15, 2021	9:00 AM – 12:00 PM	Scheduled

Note: Additional Meeting dates and times may be required.