CalSAWS | Notes from IVR/Contact Center Committee Meeting

Date:	**November 17, 2021**	**Notes Location:**	**Microsoft Teams**
Time:	**9:00 am – 12:00 pm**	**Meeting Called by:**	**Darcy Alexander**

Attendees:

R1 ☒ Karen Elizondo
R1 ☐ ~~Rachel Gomez~~
R1 ☒ Celeste DuBay
R1 ☐ ~~Nancy Rodriguez~~
R1 ☒ Monica Castillo
R1 ☒ Norma Fetters
R2 ☒ Cathy Collins
R2 ☒ Shawna Reed
R2 ☒ Chris Craig
R2 ☒ Ilda Torrez
R2 ☒ Stacy Bruemmer
R3 ☒ Danielle Smith
R3 ☒ Kailee Lewis
R3 ☒ Joshua Charlton
R4 ☒ David Mata
R4 ☒ Alfredo Jimenez
R4 ☒ Dwight Bristow
R4 ☒ Puninder (Roni) Dhillon
R4 ☒ Mark McAlister
R5 ☒ Alma Franco
R5 ☒ Cori Robertson
R5 ☒ Corrinne Simpson
R5 ☒ Nina Olivas
R5 ☒ Jason Garrett
R6 ☒ Andy Nguyen
R6 ☐ ~~Maria Montoya~~
R6 ☐ ~~Karina Estrada~~
R6 ☐ ~~Narine Tervartanyan~~
R6 ☒ Jason Reyes
CS ☐ Jared Kuester
CS ☒ Stacey Xiong
CS ☒ Logan Pratt
CS ☒ Danielle Benoit
CS ☒ Gerald Limbrick
CS ☐ Matt Lower
CS ☐ John Dray
CS ☒ Charles Heo
CS ☐ Rhiannon Chin
CS ☐ Erick Arreola
CS ☒ Kimberly Sinclair
CS ☐ Don Coffey
CS ☐ Carlos Cuenca
CS ☒ Julie Conwell – RM Sponsor
CS ☐ CDSS

Notes Taken By: **Region # 1 Responsible for Meeting Notes –**

Agenda Topic:	Important Points
Welcome/New Members: **Kailee Lewis – Region 3**	• Introduction done for new members
Meeting Notes: • Region 1 Identified as the one responsible for taking notes.	• Region #1– • Notes are due to the Contact Center Facilitator on November 24, 2021.
• **SCR CA-226839 – External Party Access Follow-up:**	• Contact Center Team • **Will be presented at the Committee Meeting on 12/15 – Design Document updates not ready today.**
• **SCR CA-226838 – Telephonic Signature Follow-up:**	• Contact Center Team • **Telephonic Signature Demo Presented Only, Design Document updates not ready today.** • **Just a demo from Design Document – there still may be changes as Design Documents not completed with updates.**

Agenda Topic:	Important Points
	• New e-sign buttons on Distributed Docs – go directly from Distributed Docs to signing it (if it is an allowable form) • Review of other options in signature methods • Requires Case Person to use • Review of new fields/features • IVR will call selected number and prompt client through signature capture • Business process decisions: whether to merge calls with clients on the line or release call to allow client to get signature call (This will be different for Contact Center staff – it is initiated differently) • Demo of how signature recording is captured by Contact Center control panel • Working with CDSS and policy (correspondence team) to have list of applicable forms • Through AWS, there will be a transcript of what is said • Demo of what happens when capture fails • One signature can be captured for multiple documents – will be linked to history • Can't go from electronic signature to telephonic signature within the same documents • There will be training material associated with this functionality • Edit of transcript isn't editing of recording • You can edit transcript without making the signature failure • Box added to check if R&R were read • Review of Capture code – codes and requests expire after 3 days • Reviewed Tasks related to signature (associated with worker that initiated signature) • Not sure if reports will be available for this – will get back to us • Danielle encourages us to look back at older design document and updates – they will send us updated document before next meeting. • Regarding R&R language: needs to go through state and advocate review

Agenda Topic:	Important Points

#	Action Item	Assigned To	Assigned Date	Due Date	Status
1					
2					

Next Scheduled Meeting – Teams – December 15, 2021 9:00 AM – 12:00 PM:

Region 2 will be responsible for meeting notes.

Proposed Monthly Meeting Schedule:

Meeting Date	Meeting Time	Cancelled/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.