Design Document

CA-208241 | CIV-104022

CalHEERS eHIT: One-Time Batches to Transition Young Adults from Restricted Scope to Full Scope Medi-Cal

Version 1.0

	DOCUMENT APPROVAL HISTORY	
CalACES	Prepared By	Rajan Vadapalli, Renee Gustafson
	Reviewed By	Max Volf, Chris Larson, William Baretsky, Raju Indala, Prashant Goel, Derek Goering, Ronak Bhatt, Priya Subramaniam, Abraham Ponce

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
05/29/2019	1.0	Initial version	Rajan V
06/04/2019	1.0	Version reviewed at MC Committee Meeting for feedback	Rajan V
06/24/2019	1.0	Updated SCR Name, clarified journal and lists. Updated references to 'reevaluation' to 'transition. Updated document based on DHCS clarification for MAGI MC limited scope aid codes. Updated scheduling dependencies. Added assumption to not process inmate cases. Added criteria to not process overridden, read-only or manual EDBC cases.	Renee
6/26/2019	1.0	Updated journal current functionality and recommendations for LRS. Added CTCR requirement for LRS Batch EDBC Sub-Type Code. Restricted processing from under 26 to only 19-25 (not to process any SB75 stragglers).	Renee
07/01/2019	1.0	Version submitted to MC Committee for Approval	Renee
7/17/2019	1.0	Added columns to lists per MC Committee request	Renee

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1 OVERVIEW

This SCR will automate the transition of young adults 19-25 years of age, inclusive, currently in restricted scope Medi-Cal to full scope Medi-Cal with a one-time batch process.

1.1 Current Design

In Release 19.09, CalHEERS and The System were updated to grant full scope Medi-Cal for young adults who are 19 to 25 years of age, inclusive, regardless of satisfactory citizenship or immigration status if they meet all other eligibility criteria effective January 2020 benefit month starting 11/20/2019 with SCRs CA-206941, CIV-103874 and CalHEERS Change Request CH-139211. This population is referred to as "Young Adult Expansion."

The System has individuals age 19-25, inclusive, still receiving restricted scope Medi-Cal who should be transitioned to full scope Medi-Cal.

C-IV Batch EDBC process skips cases if the Determination of Eligibility Response (DER) to be used in Medi-Cal EDBC has an individual in Soft Pause; LRS does not have this functionality.

LRS Batch EDBC functionality allows Batch EDBC to automatically add a standard Journal entry to cases processed by Batch EDBC with:

> **Journal Category:** Eligibility
> **Journal Type:** Batch EDBC
>
> **Short Description:** Batch EDBC ran for [MONTH/YEAR].
>
> **Long Description:** Batch EDBC ran for [MONTH/YEAR]. Batch EDBC processed for the Medi-Cal program for the following reasons: <Batch EDBC Sub-Type Code Short Description>

There is no Batch EDBC Sub-Type Code for Young Adult Expansion one-time transition batch processing, so LRS will automatically create the journal entry with a missing reason in the Long Description. C-IV does not have the functionality to automatically add a standard Journal Entry.

1.2 Requests

Automate the transition of young adults age 19- 25, inclusive, currently receiving restricted scope Medi-Cal to full scope Medi-Cal based on the Transition Aid Code Crosswalk provided by DHCS.

For LRS only: Add a Batch EDBC Sub-Type Code so the auto-journal Long Description will display the reason: "Young Adult Expansion one-time transition batch".

For C-IV only: Create a Journal entry for the cases processed successfully through Batch EDBC.

Provide one-time County lists for County Eligibility Workers to follow-up on any individuals who remain in restricted scope Medi-Cal or who are Discontinued from Medi-Cal after the one-time transition batch processing is complete.

1.3 Overview of Recommendations

Initiate a one-time process to send Eligibility Determination Requests (EDRs) to CalHEERS and run Batch EDBC for identified individuals 19 to 25 years of age, inclusive, who are receiving restricted scope Medi-Cal to transition to full scope Medi-Cal and provide lists to the County for follow-up of the rest.

For LRS only: Add a Batch EDBC Sub-Type Code to display the Journal Long Description reason: "Young Adult Expansion one-time transition batch".

For C-IV only: Create a Journal entry for the cases processed successfully in the one-time process.

1.4 Assumptions

1. This one-time batch process may include Medi-Cal programs with an overdue RE or an in-process RE.

   LRS current functionality automatically sets EDBC Run Reason to 'RE' when all the following are true:
   a. The EDBC benefit month is equal to next RE period begin date and there is a valid open RE record for the Medi-Cal program
   –or –
   The EDBC benefit month is equal to the come-up month.
   b. The appropriate RE packet was generated for the RE Due Month for the program.
   c. The latest RE packet status is 'Reviewed-Ready to Run EDBC'

   For LRS only, this means if a Medi-Cal program is processed in the one-time batch process and meets the LRS current criteria for automatically setting the EDBC Run Reason to 'RE', the Medi-Cal program will process as a Renewal.

   C-IV does not have this functionality so the C-IV EDBC will be processed as a 'Regular' EDBC.

2. While the description of Young Adult Expansion mentions to move individuals aged 19-25, inclusive, from restricted scope to full scope, per the "Transition Aid Code Crosswalk" provided by DHCS, limited scope MAGI Medi-Cal aid codes are also included in the transition population. Limited scope MAGI Medi-Cal aid code M8 shows that the individual should be transitioned to full scope MAGI Medi-Cal aid code M7. Similarly, limited scope MAGI Medi-Cal aid code M0 shows that the individual should be transitioned to limited scope MAGI Medi-Cal aid code M9.

   DHCS confirmed limited scope MAGI Medi-Cal is included in the Young Adult Expansion to full scope and that limited scope MAGI Medi-Cal aid code M9 is the expected final result after transitioning the Young Adult Expansion population who were previously eligible to limited scope MAGI Medi-Cal aid code M0. See "Clarification from DHCS for limited scope MAGI Medi-Cal transition" in Supporting Documents.

   This one-time batch will include transitioning the young adult expansion population currently in restricted scope Medi-Cal and limited scope MAGI Medi-Cal aid codes M8, M0.

3. This one-time batch will not transition individuals in an inmate Medi-Cal aid code, but they will be included in List 3 "Individual age19-25 on Restricted Scope Medi-Cal" for county worker follow-up.

4. **LRS only**: Child Welfare Medi-Cal programs will be identified through the worker associated to the program. The workers for Child Welfare Programs are associated to positions that have unit department type of "DCFS". These workers can be identified by the prefix of "19**DC**" in their worker ID numbers.

2 RECOMMENDATIONS

2.1 One-time Batch

2.1.1 Overview

Initiate a one-time process to send EDRs to CalHEERS and run Batch EDBC for identified individuals 19 to 25 years of age, inclusive, who are receiving restricted scope Medi-Cal to be transitioned to full scope Medi-Cal. Create a Journal entry for the cases processed successfully in the one-time process.

2.1.2 Description of Changes

1. Batch MAGI
   - I. Identify Medi-Cal programs that meet all the following conditions for one-time Batch MAGI processing:
     - a. The Medi-Cal program contains an individual that meets all of the following conditions:
       - i. The individual's 19th birthday is on or before 01/01/2020.
       - ii. The individual's 26th birthday is on or after 01/02/2020.
       - iii. The individual is currently receiving any of the following aid codes during the January 2020 benefit month:
         - a restricted scope Medi-Cal aid code
         - limited scope MAGI Medi-Cal Aid Code M8
         - limited scope MAGI Medi-Cal Aid Code M0
     - b. The program contains at least one MAGI Medi-Cal eligible individual.
     - c. The CEW has not already processed MAGI and a corresponding Medi-Cal EDBC for January 2020 benefit month since the start date of the Young Adult Expansion rules update in SCR CA-206941/CIV-103662. (The start date is currently 11/20/2019 – subject to change by DHCS.)
     - d. The Medi-Cal EDBC effective January 2020 is not an overridden, read-only or manual EDBC.
     - e. **LRS only:** The program is not assigned to a Child Welfare Program Worker.
   - II. Send the EDR with "Continuing" (CO) EDR Run Reason code for benefit month January 2020.

2. Batch EDBC

   A. MAGI Medi-Cal and mixed MAGI/Non-MAGI

      I. Identify MAGI Medi-Cal and mixed MAGI/Non-MAGI Medi-Cal programs that meet all the following conditions for one-time Batch EDBC processing:
         a. The DER is received from Recommendation 1 and all the following conditions are true:
            i. There are no ‘Pending Eligible’ MAGI Medi-Cal individuals on the DER.
            ii. No individual became eligible for MAGI Medi-Cal who was previously not in receipt of MAGI Medi-Cal.
            iii. No individual became discontinued or ineligible for MAGI Medi-Cal who was previously a recipient of MAGI Medi-Cal.
            iv. There are no individuals on Soft Pause on the DER.
         b. Medi-Cal EDBC has not been processed against the DER from Recommendation 1 or any subsequent DER for the January 2020 benefit month.
         c. The Medi-Cal EDBC effective January 2020 is not an overridden, read-only or manual EDBC.
         d. **LRS only:** The program is not assigned to a Child Welfare Program Worker.

      II. Run Batch EDBC for January 2020 benefit month for the Medi-Cal program in Targeted Program mode with Type Code “Batch Eligibility” (BE).
         a. **LRS Only:** Include the new Batch EDBC Sub-Type Code added in Recommendation 2.1.2.3. I.

B. Non-MAGI Medi-Cal

I. Identify Non-MAGI Medi-Cal programs that meet all the following conditions for one-time Batch EDBC processing:
   a. The program does not contain a MAGI Medi-Cal eligible individual.
   b. The program contains an individual where all of the following are true:
      i. The individual's 19th birthday is on or before 01/01/2020.
      ii. The individual's 26th birthday is on or after 01/02/2020.
      iii. The individual is currently receiving a restricted scope Non-MAGI Medi-Cal aid code other than CMSP and Minor Consent Medi-Cal aid codes during the January 2020 benefit month.
   c. Medi-Cal EDBC has not been processed for January 2020 benefit month since the start date of the Young Adult Expansion rules update in SCR CA-206941/CIV-103662. (The start date is currently 11/20/2019 – subject to change by DHCS.)
   d. The Medi-Cal EDBC effective January 2020 is not an overridden, read-only or Manual EDBC.
   e. **LRS only:** The program is not assigned to a Child Welfare Program Worker.

II. Run Batch EDBC for January 2020 benefit month only for the Medi-Cal program in Targeted Program mode with Type Code 'BE' (Batch Eligibility).
   a. **LRS Only:** Include the new Batch EDBC Sub-Type Code added in Recommendation 2.1.2.3. I.

3. Journal Entry
   I. **LRS only:** Add Batch EDBC Sub-Type Code (CT_942) for "Young Adult Expansion one-time transition batch" to the code table.

Code Table	Description
New/Update	New
Category Id	942
Short Description	Young Adult Expansion one-time transition batch
Long Description	Young Adult Expansion one-time transition batch

This will allow LRS to generate an auto-journal with the following information for each case processed successfully through Batch EDBC from Recommendation 2.

Journal Category: Eligibility
Journal Type: Batch EDBC
Short Description: Batch EDBC ran for 01/2020.
Long Description: Batch EDBC ran for 01/2020. Batch EDBC processed for the Medi-Cal program for the following reason: Young Adult Expansion one-time transition batch.

   II. **C-IV only:** Insert a Journal entry for each case processed successfully through Batch EDBC from Recommendation 2 with the following information:

Journal Category: Eligibility
Journal Type: Batch EDBC
Short Description: Batch EDBC ran for 01/2020.
Long Description: Batch EDBC ran for 01/2020. Batch EDBC processed for the Medi-Cal program for the following reason: Young Adult Expansion one-time transition batch.

2.1.3 Execution Frequency

This is a one-time change.

2.1.4 Key Scheduling Dependencies

- Friday 11/22/2019
  Batch operations team will run the Data Change Request (DCR) for Recommendation 1 before regularly scheduled batch processing on Friday, 11/22/2019. Then Friday's regularly scheduled batch will send the EDRs during Batch MAGI.

- Saturday 11/23/2019
  Batch operations will run the DCR for Recommendation 2 before regularly scheduled batch processing on Saturday, 11/23/2019. Then Saturday's regularly scheduled batch will process the cases through Batch EDBC.

- The C-IV journal entry DCR will run after Batch EDBC completes and before the C-IV application is up on Monday, 11/25/2019.

2.1.5 Counties Impacted

All 40 counties.

2.1.6 Data Volume/Performance

Batch MAGI will run approximately below mentioned Medi-Cal programs for the month of January 2020.

BENEFIT MONTH	C-IV	LRS
January 2020	13,721	23,230

Batch EDBC will run approximately below mentioned Medi-Cal EDBCs for the month of January 2020. At least one Notice of Action is expected for each of the cases processed in Batch EDBC.

BENEFIT MONTH	C-IV	LRS
January 2020	14,365	23,845

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Eligibility	Transition Aid Code Crosswalk	Transition Crosswalk Final Vers
2	Eligibility	Manual Clean up Aid Code Crosswalk	Manual Clean up Crosswalks Final Ve
3	Eligibility	Clarification from DHCS for limited scope MAGI Medi-Cal transition	**RE Young Adult Expansion Aid code**

4 OUTREACH

Generate one-time County lists to aid the counties to complete the transition of young adults to full scope Medi-Cal after Batch EDBC completes.

The lists will display the standard columns:

- Case Name
- Case Number
- County
- Unit
- Unit Name
- Office Name
- Worker
- Benefit Month

Lists will be posted at following locations:

System	Path
LRS	CalACES Web Portal>System Changes>SCR and SIR Lists>2019>CA-208241
C-IV	CalACES Web Portal>System Changes>SCR and SIR Lists>2019>CIV-104022

1. **List Name:** Medi-Cal Program Discontinued
   Generate a list of cases where the Medi-Cal program was discontinued due to the one-time Batch EDBC processing for Young Adult Expansion transition to full scope.

   Additional Column: None

   County Action: These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC by the user. Since the purpose of this Batch EDBC process was not to close households, review these cases to verify the closure was accurate.

2. **List Name:** Medi-Cal Individual Discontinued
   Generate a list of cases where an individual was discontinued from the Medi-Cal program due to the one-time Batch EDBC processing for Young Adult Expansion transition to full scope.

   Additional Columns:

   - CIN
   - Prior Aid Code – Display the aid code the individual was on prior to the discontinuance
   - DOB

   County Action: These are likely the result of household changes or ongoing data collection which was not yet processed through EDBC by the user. Since the purpose of this Batch EDBC process was not to close individuals, review these cases to verify the closure was accurate.

3. **List Name:** Individual age 19-25 on Restricted Scope Medi-Cal

   Generate a list of cases that meets the following criteria:

   - At least one individual whose 19^{th} birthday is on or before 01/01/2020 and 26^{th} birthday is on or after 01/02/2020 is still in restricted scope Medi-Cal or in limited scope aid codes M8, M0 or N7 (limited scope inmate aid code) other than CMSP and Minor Consent Medi-Cal aid codes effective January 2020 benefit month.

   Include a column to indicate the reason(s) the Young Adult Expansion transition one-time batch processing did not move the individual to full scope.

   Known reasons:

   - **Became MAGI Elig on DER:** As a result of Batch MAGI, an individual became eligible for MAGI Medi-Cal who was previously not in receipt of MAGI Medi-Cal.
   - **MAGI Disc or Inelig on DER:** As a result of Batch MAGI, an individual became discontinued or ineligible for MAGI Medi-Cal who was previously a recipient of MAGI Medi-Cal.
   - **MAGI Pending on DER:** EDBC did not process because an individual is Pending Eligible on MAGI Determination.
   - **Soft Pause:** EDBC did not process because there is an individual on the DER in Soft Pause.
   - **Read-Only EDBC:** EDBC processed, but it was Read-Only.
   - **In Process DER for Jan 2020:** Batch MAGI or Batch EDBC did not process because there is an 'In Process' Determination Change for January 2020.
   - **Overridden, Read-only or Manual EDBC:** The Medi-Cal program was not processed by Batch MAGI nor Batch EDBC because the EDBC effective for January 2020 is an overridden, read-only or manual EDBC.
   - **DER returned after Batch EDBC:** EDBC did not process because the DER from Batch MAGI did not return prior to running Batch EDBC; however, the DER did return prior to generating this list.

- **Child Welfare Program Worker:** The Medi-Cal Program is assigned to a Child Welfare Program Worker (LRS only).

Additional Columns:

- CIN
- Reason – Display all of the 'known reasons' that apply to the individual, leave blank if none apply.
- Aid Code – Display the individual's primary aid code effective 01/01/2020
- DOB

County Action: For cases where EDBC did not process as a result of being excluded from Batch EDBC, review the list and the Known Reason(s) to determine why the case did not process. Not all reasons will display so the worker will have to review the case for any other action necessary.

For cases that did process, review the case for the individual age 19-25, coming back on the DER as Soft Paused to keep them on the Restricted or Limited aid code. Follow process to remove the Soft Pause and re-run case to determine correct benefits. For cases that were returned a Read-Only EDBC, review the EDBC to determine the reason and take action to have a Regular EDBC returned to determine correct benefits for the customer.

Note: Some cases may have a blank reason column if an individual age 19-25, remains on restricted scope for any reason other than what is listed above. Some cases may have multiple reasons in the column.

5 REQUIREMENTS

5.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.4.3.2	The LRS shall determine an applicant s/participant s eligibility for a program or programs.	The System will update Medi-Cal EDBC rules to grant full scope Non-MAGI Medi-Cal for all eligible young adults who are 19 to 25 years of age, inclusive, regardless of their citizenship or immigration status if they met all other eligible criteria.

6 APPENDIX

6.1 'The System' Definition

'The System' refers to both LRS and C-IV systems.

For instance, if the document mentions the below:

- Update The System to...

That implies:

- Both LRS and C-IV Systems will be updated with the same changes.

Design Document

SCR 103540 – Customized Control Panel for Amazon Connect

	DOCUMENT APPROVAL HISTORY	
	Prepared By	Gerald Limbrick
	Reviewed By	[individual(s) from build and test teams that reviewed document]

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/14/2019	1.0	Initial	Gerald Limbrick
7/8/2019	1.1	Added On hold state	Gerald Limbrick
9/30/2019	1.2	Logic & visual changes, new Phone icon & removed Hold state	Gerald Limbrick
10/11/2019	1.3	Can’t log out from “After Call Work” & refresh interval changes	Gerald Limbrick

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1 OVERVIEW

C-IV is changing the contact center Interactive Voice Response system (IVR) from Cisco Finesse to Amazon Connect. The default Amazon Connect Call Control Panel (CCP), which is the interface used by contact center staff to receive and handle calls, does not have the features needed.

This SCR will create a customized Call Control Panel with features mirroring those in the Cisco Finesse interface.

An application will be installed on the user's desktop to open compatible browser windows. The CCP will open in a Chrome based window. The C-IV System will open in Internet Explorer.

1.1 Current Design

The default Amazon Connect CCP does not have the features needed by the contact center staff.

1.2 Requests

1) Recreate the functionality of Cisco Finesse as a customized CCP for Amazon Connect.
2) Update the C-IV system screen pop to Accept the Contact ID used by Amazon Connect.

1.3 Assumptions

1) Call routing is handled by the Amazon Connect IVR system (IVR) and is outside the scope of this SCR.
2) The Visual IVR portion of the CCP will be added in SCR# CIV-103672 including the Call Me functionality. Visual IVR functionality currently applies to San Bernardino county only.
3) The list of agent states will be retrieved from the IVR and is outside the scope of this SCR.
4) The list of speed dial contacts will be retrieved from the IVR Quick Connects and is outside the scope of this SCR.
5) The list of teams, and their corresponding lists of agents managed by a supervisor, is retrieved from a hierarchy defined in the IVR and is outside the scope of this SCR.
6) The CCP will use the same method for authorization as is used in the C-IV System.
7) Security will be administered through the C-IV system.
8) The CCP takes actions and makes changes by sending requests to the backend Amazon Connect IVR system. Error messages have been documented in the unlikely event of a failed request.
9) Separate migration SCRs have been created to transition call centers to this new CCP. Training will be documented with migration SCR's: CIV-103539 & CIV-103667 – 103677.

10) Call recording is not handled by the CCP. Call recordings will remain in place with Calabrio.

2 RECOMMENDATIONS

2.1 Call Log Detail Page (C-IV system)

2.1.1 Overview

The C-IV system currently accepts Screen Pop parameters from a Call Center Application. The C-IV system accepts a Router Call Key – Router Call Key Day which identifies a call center Customer Contact.

The new IVR solution used by this CCP will use a Contact ID field instead. The C-IV system will be updated to accept the new Contact ID field as an alternative to the Router Call Key– Router Call Key Day.

2.1.2 Description of Changes

1) Update the C-IV system to also accept an Amazon Connect Contact ID, in absence of the Router Call Key – Router Call Key Day, to identify a Customer Contact.

2.1.3 Page Location

Global: Tools

Local: Office

Task: Call Log

2.2 Login Page

2.2.1 Overview

The Log In page will be used to validate that a user should be allowed to access the CCP Home screen.

2.2.2 Login Page Mockup

Figure 2.2.1 – Login Page

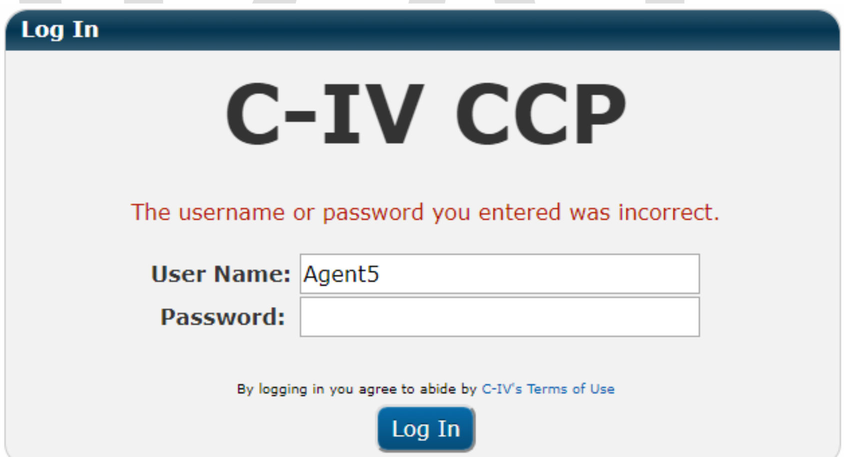


Figure 2.2.2 – Login Page – Unknown User

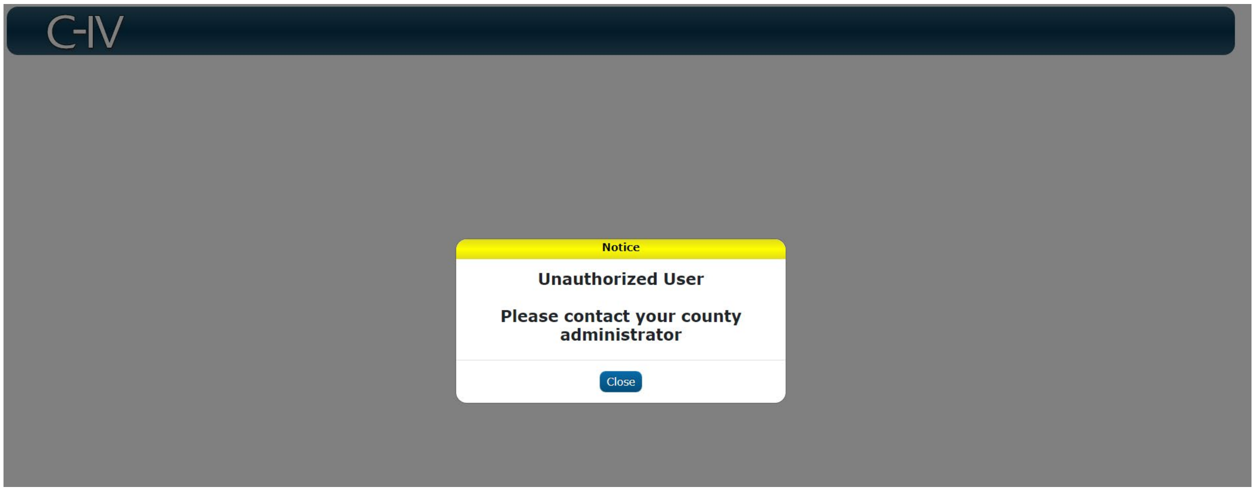


Figure 2.2.3 – Known User without CCPAgent Rights

2.2.3 Description of Changes

1) Create a text field labeled: "User Name:".
2) Create a masked Password field labeled: "Password".
   a) Each character must be masked before the next character is entered if not sooner.
3) Access to the Login page will not be dependent on the user's security rights.
4) Add the "C-IV Terms of Use" label and link.
5) Add a 'Log In' button. This button will:
   a) Query a service to authenticate the user.
      i) If no user is entered or the user is not known to the system, show red Error text: "The username or password you entered was incorrect above the "User Name" field.
   b) Open the CCP Home page (if authorized):
   c) Query a service to retrieve the user's Rights.
   a) If the user does not have 'CCPAgent' rights, show a Notice popup with text: "Unauthorized User Please Contact Your County Administrator". on the home page (with only the C-IV logo in a blank header panel).
   d) Users with 'CCPAgent' rights will have basic access to the CCP in Agent view, all CCP users must have 'CCPAgent' rights.
   e) Users with the 'CCPSupervisor' rights will also be shown the 'Team Performance' Panel.
   f) Users with the 'CCPMessageSender' rights will also be shown the Message Sender Panel.

2.2.4 Page Location

NA

2.2.5 Security Updates

<u>Security Rights</u>

Security Right	Right Description	Right to Group Mapping
CCPAgent	Allows access to CCP Home page with the Agent view	CCP Agent
CCPSupervisor	Allows access to the 'Team Performance' panel	CCP Supervisor
CCPMessageSender	Allows access to the Message Sender panel	CCP Message Sender

<u>Security Groups</u>

Security Group	Group Description	Group to Role Mapping
CCP Agent	Users can use the Call Control Panel in a call center	Regional Call Center Staff
CCP Supervisor	Users can view and manage team performance in addition to having the use of the Call Control Panel in a call center	Regional Call Center Supervisor
CCP Message Sender	User can update the 'Message of the Day' in the Call Control Panel	

Note: Local Security administrators (LSA) will need to assign the above groups to appropriate staff and/or security roles.

2.3 CCP Home Page

The Call Control Panel (CCP) will be used to take calls from the Amazon Connect IVR (IVR).

2.3.1 Overview

The Home page will be the working area of the CCP used for agents to make and receive calls and view agent and queue statistics.

Calls will be routed to an agent and will either be auto accepted or will require the agent to choose to accept the call, based on each county's call flow configuration. When a call is accepted, the CCP will open the C-IV application pre-populated with the same call information as was populated when using the Cisco Finesse call center solution (when the data is available). The Person Search page will be opened if the information is not available, the same as the Cisco Finesse solution.

The CCP will also have functionality for authorized users to add a message which will be displayed for all CCP users.

The CCP will show a list of links commonly used by call center agents. The list of links is unique to each county. County workers will follow the same process as today to request the list of links for their county be updated.

Note: The CCP will send messages to the IVR and receive messages from the IVR including availability state changes. The CCP will change the displayed availability state based on messages received from the IVR. Some states such as the "Talking" and "After Call Work" states cannot be set manually and are displayed to the agent based on these messages from the IVR.

2.3.2 Home Page Mockups

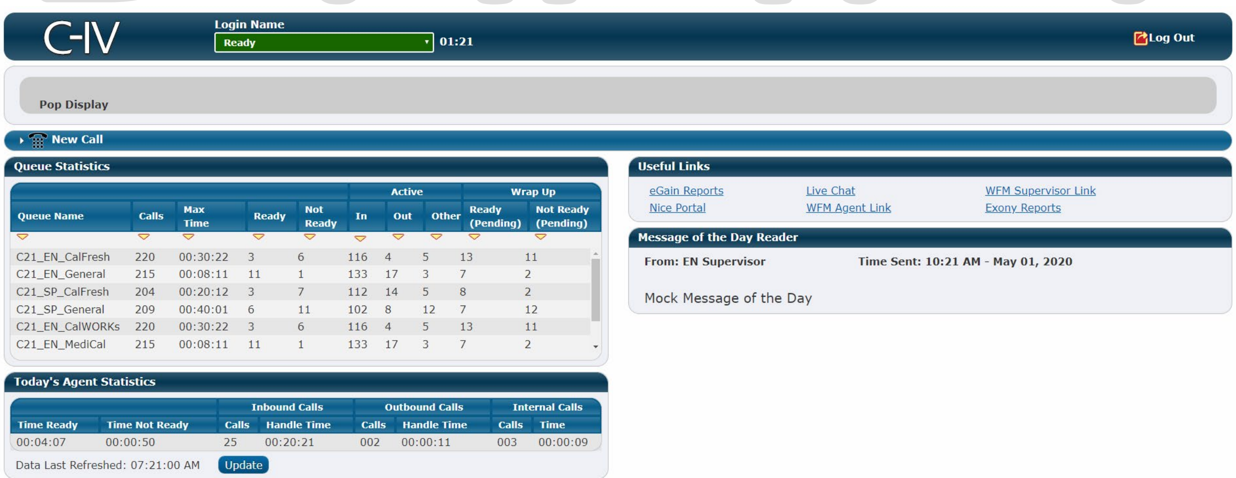


Figure 2.3.1 – Agent Ready

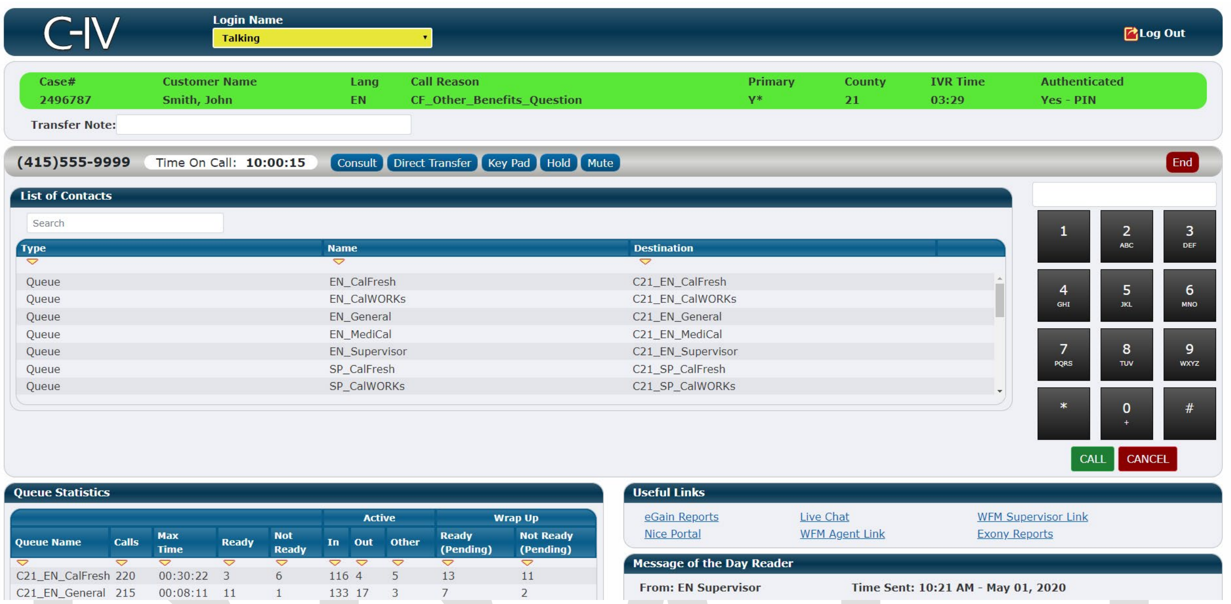


Figure 2.3.2.a – Agent Phone Expanded Authenticated Talking

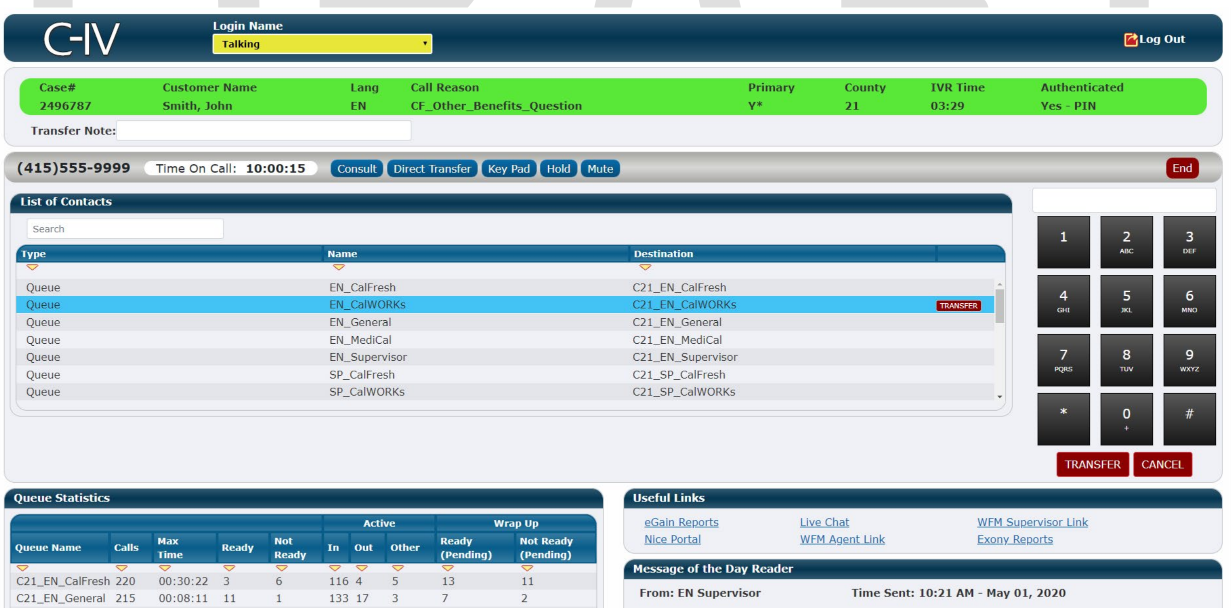


Figure 2.3.2.b – Agent Phone Expanded Transfer to a Contact

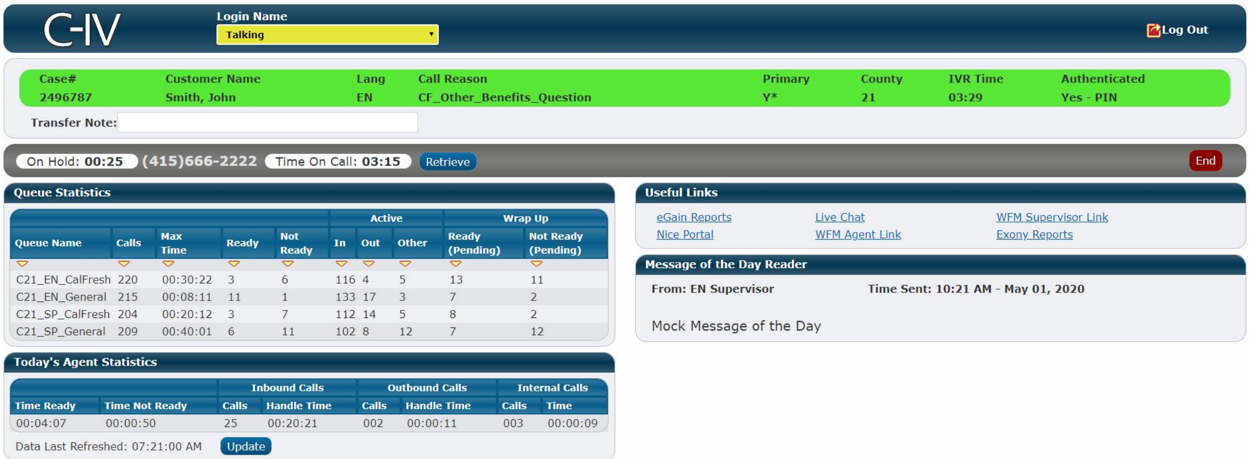


Figure 2.3.3 – Agent Call On Hold

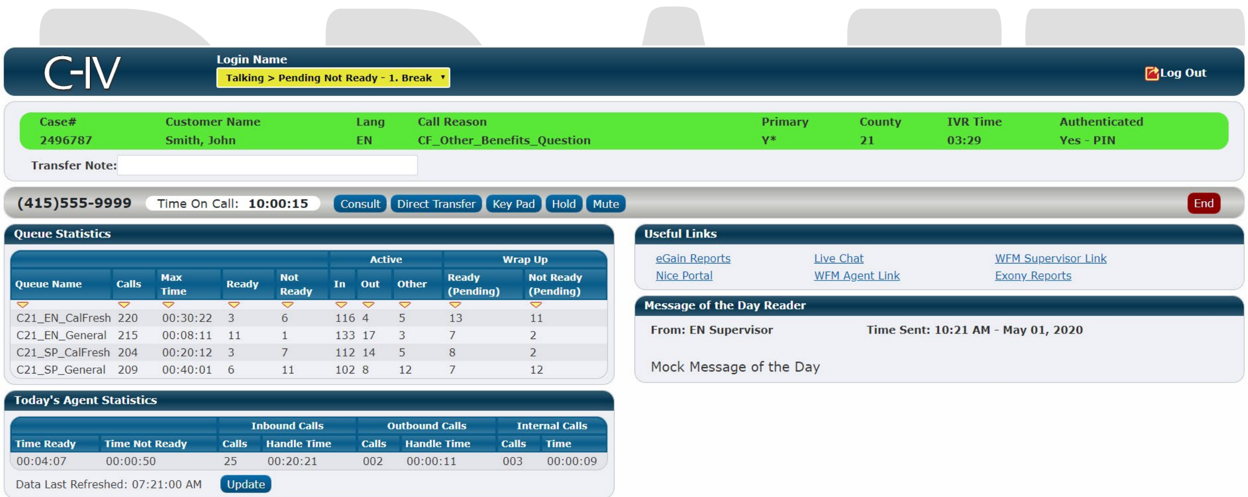


Figure 2.3.4 – Agent Pending State

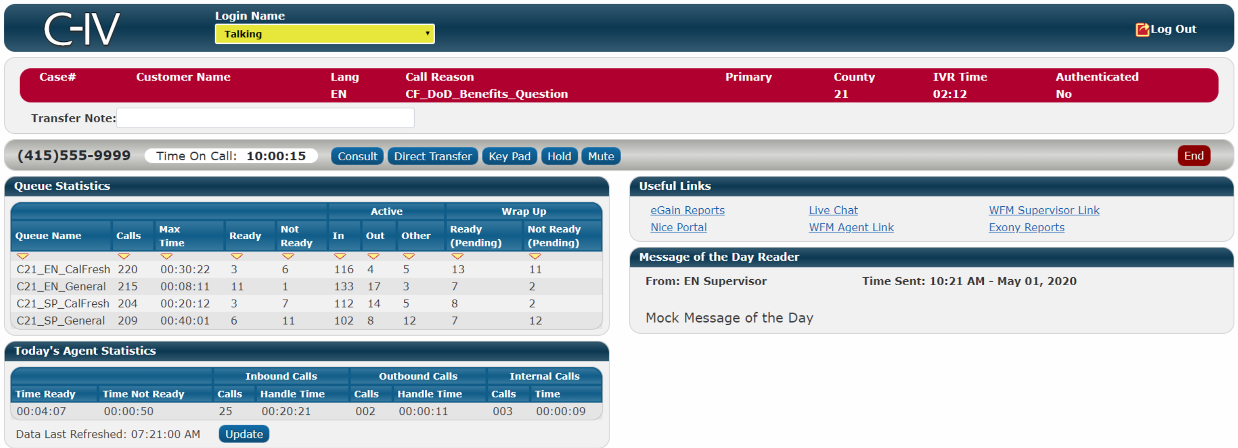


Figure 2.3.5 – Agent Not Authenticated Talking

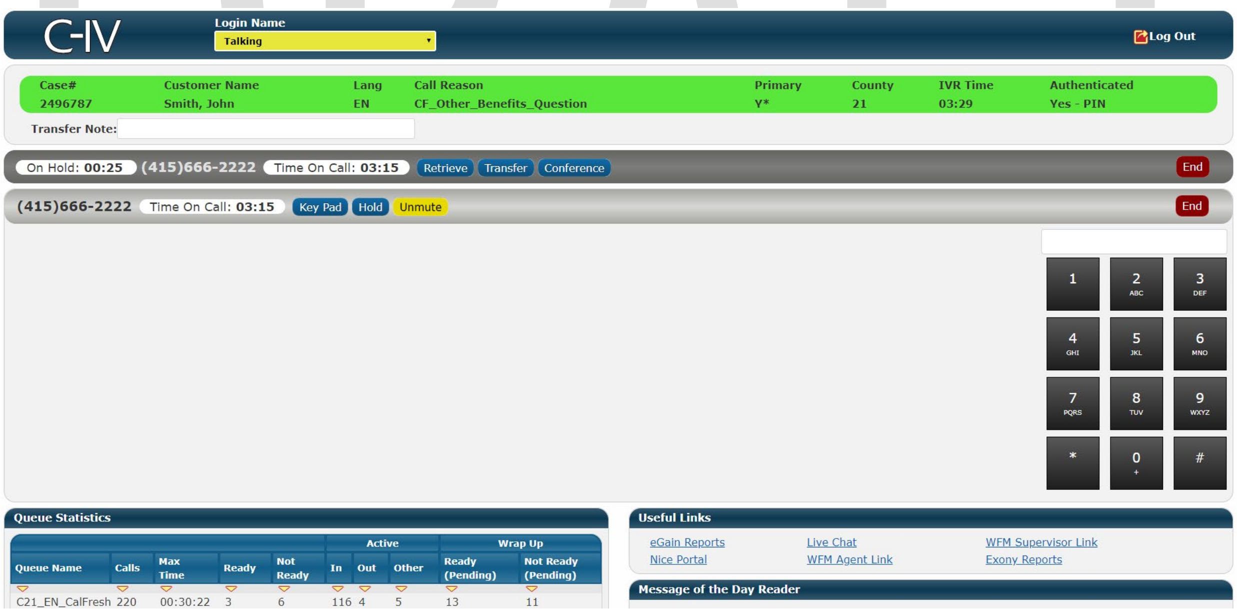


Figure 2.3.6.a – Agent, Two Calls, Key Pad Only

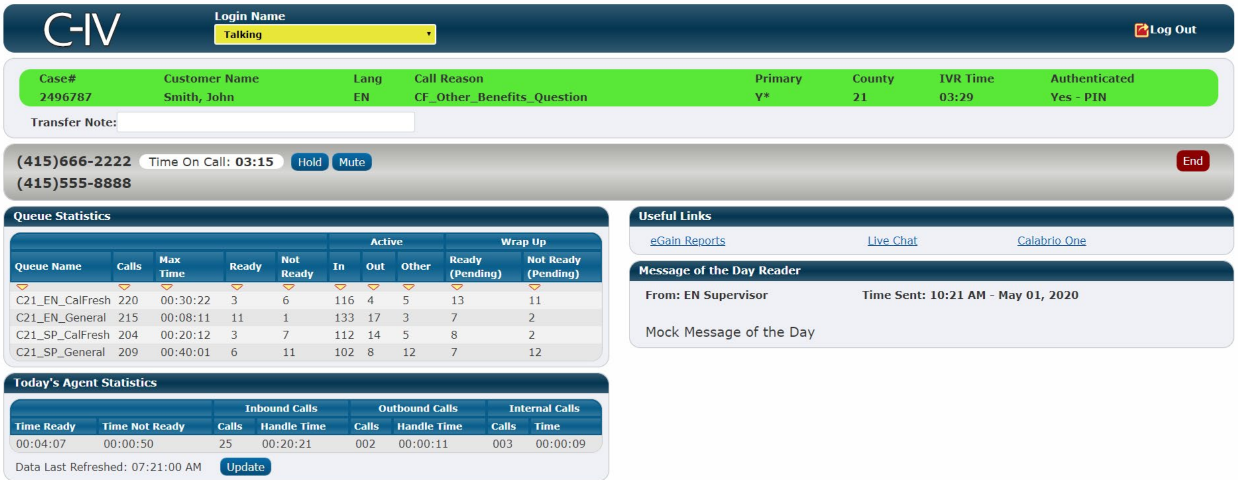


Figure 2.3.6.b – Agent Conference Call

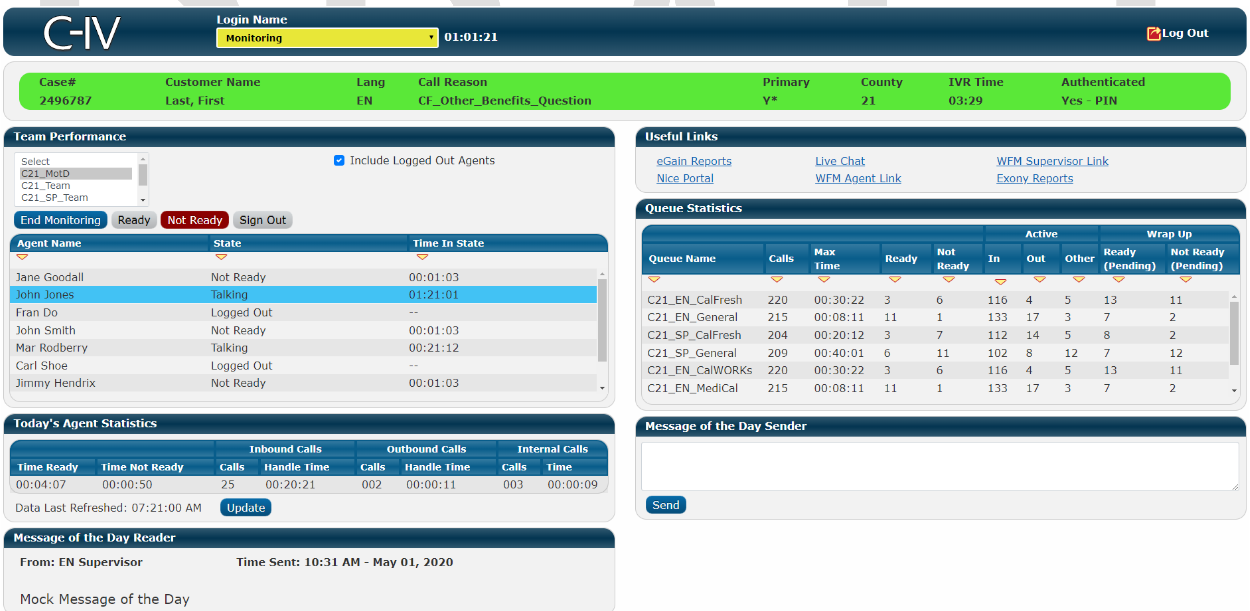


Figure 2.3.7 – Supervisor Monitoring

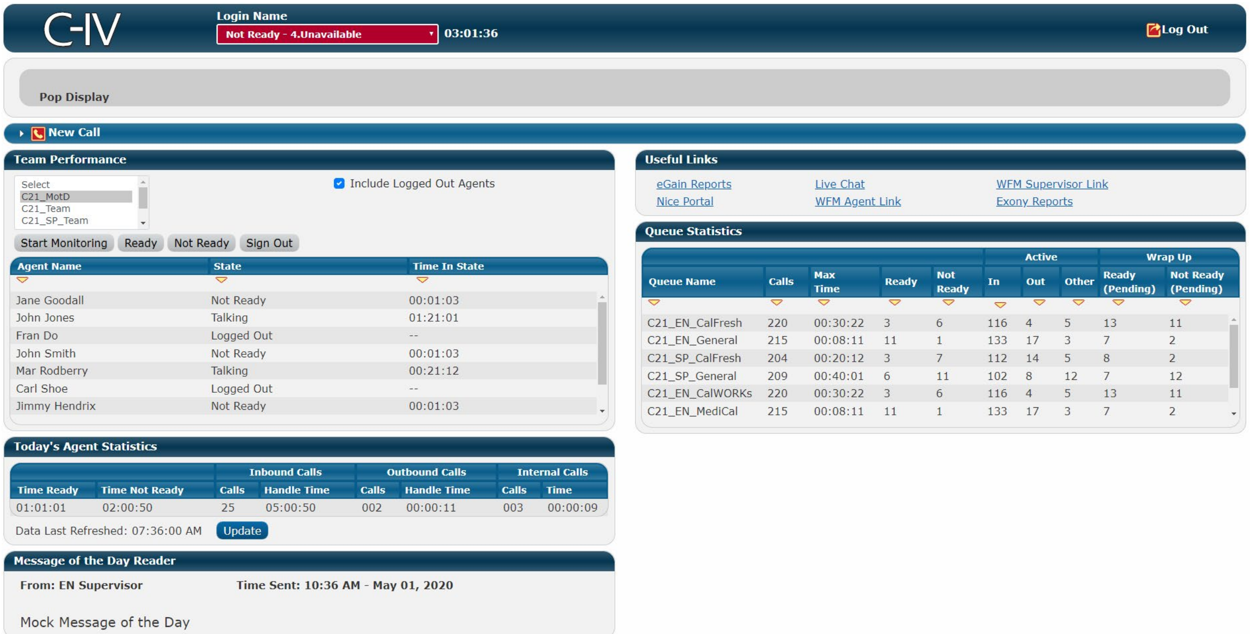


Figure 2.3.8 – Supervisor - Disabled Buttons No Message Sender Panel

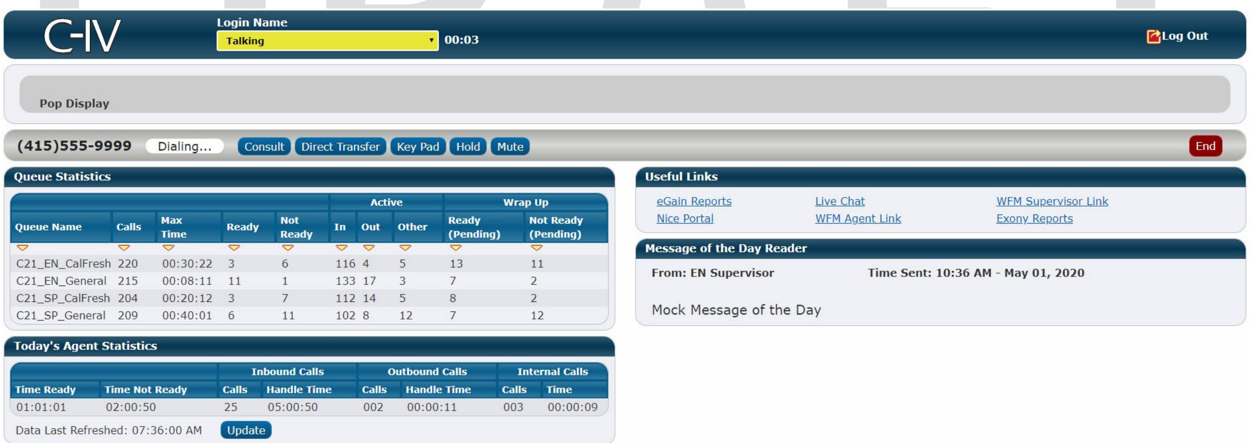


Figure 2.3.9 – Agent Dialing

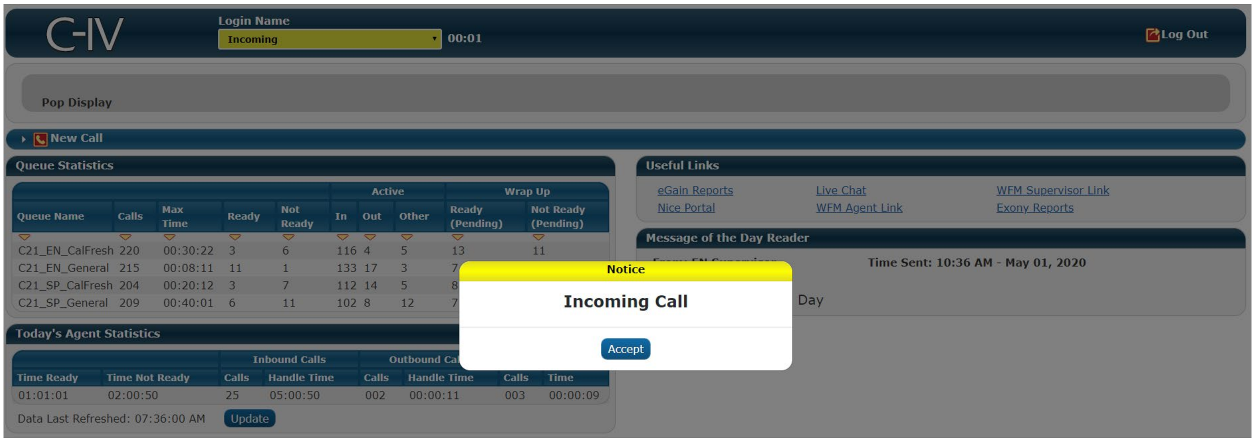


Figure 2.3.10 – Incoming Call

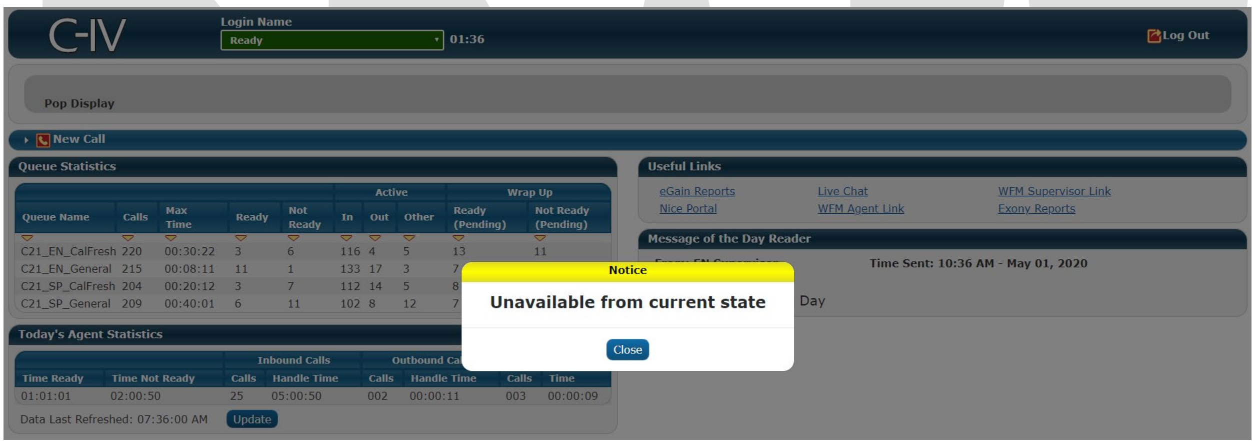


Figure 2.3.11 – Log Out Warning

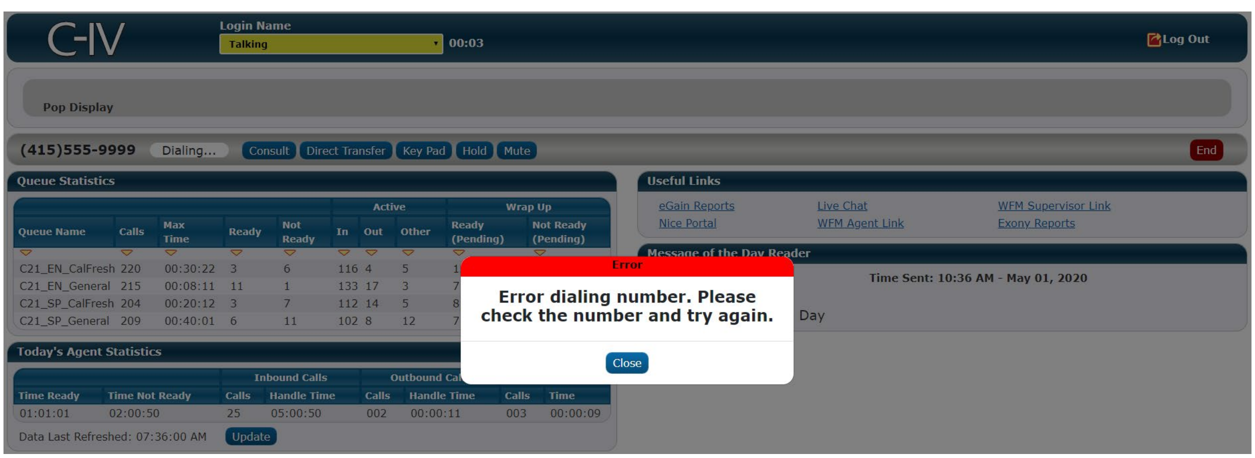


Figure 2.3.12 – Error Dialing

2.3.3 Description of Changes

1. The application will open a Chrome based browser. Due to the change to the Amazon Connect Computer based phones, set the browser with permission to use the microphone.
2. Set the default resolution/screen size for the CCP to 1920 x 1080. If the browser window is resized smaller add scroll bars to allow the user to scroll up and down or left and right to the desired viewing area.
3. Create a Home page for the CCP.
   a) This page will be protected by the 'CCPAgent' rights. ('CCPAgent' rights will be given to agents rolled on by the counties.)
   b) If a known user logs in to the CCP but does not have 'CCPAgent' rights, display a Notice popup with text: "Unauthorized User Please Contact Your County Administrator" on an empty home page (with only the C-IV logo in a blank header panel).
4. If a call comes in from a call flow that requires calls to be accepted, for example a call back queue (or based on county configuration):
   a) Show an Accept Call popup with the text: "Accept Call".
   b) Dismiss the popup if the agent state changes. Note: The agent state will be changed by the IVR if the agent does not accept the call.
   c) Add an 'Accept' button to accept the call and dismiss the popup.
   d) Disable other page functionality until the call is accepted.
   e) Note: User will not be able to perform any other actions on the page until the call is accepted.
5. When an incoming call is accepted:
   a) Connect the agent to the call.
      (1) If an error occurs while connecting the agent to the call:
         (a) Show an Error popup with text: "Error connecting to the call." Note: The Amazon Connect IVR (backend system) can change the agent availability state based on errors. The call control panel will be monitoring for state changes and the CCP will update the State dropdown box (described below).
   b) Use the call details received from the Amazon Connect IVR to open a C-IV system window, in Internet Explorer, as the available information allows:
      i) Open a C-IV system window, in Internet Explorer, to the Person Search page, if information was not available (unauthenticated caller).
      ii) Open a C-IV system window, in Internet Explorer, to the Case Summary page when information is available (authenticated caller).
      iii) Open a C-IV system window, in Internet Explorer to the Call Log Detail page with the following information populated (as available):
         (1) Case number
         (2) Worker ID

(3) Date/time
(4) Language
(5) County

Note: Call Log Detail page will open for all calls.

c) Note: Counties have the option to opt in to auto connect in which case calls are automatically accepted, skipping the "Incoming" state.

6. Add a Header panel at the top of the page.
   a) Add the C-IV Logo, as an image, on the left end of the Header panel.
   b) Retrieve the User-Friendly Display Name (this is an Amazon Connect field) of the logged in agent from Amazon Connect and display it to the right of the logo image.
   c) Add a State dropdown box for the agent to set their availability state, and to display the agent's state, when it is changed by the IVR system.
      i) Position the dropdown below the user's name.
      ii) Pull the list of agent selectable states (Amazon Connect List) for the current call flow from Amazon Connect and display them in the dropdown. Note: The list of states is retrieved from the Amazon Connect IVR and is outside the scope of this SCR.
         (1) If an error is returned when retrieving states, show an Error popup with text: "Error retrieving list of states."
      iii) While monitoring or while the IVR does not allow state changes:
         (1) When a supervisor is monitoring another user, disable the supervisor's dropdown.
         (2) When the IVR does not allow user state changes, display a place holder "Pending" state. (The Amazon Connect IVR does not allow the user to change the state while actively on a call but the IVR will change the user to the "After Call Work" state after a call allowing the CCP to update the state programmatically.)
            (a) Add logic to change the dropdown box to a "Pending" state.
            (b) Display the state with a yellow background as: "Current_State > Pending New_State, e.g. "Talking > Pending Not Ready – 1. Break"
      iv) Add a suggestive background color to the dropdown box:
         (1) Add a green background for the "Ready" state.
         (2) Add a red background for all "Not Ready" and "Error" states.
         (3) Add a yellow background for the "Talking", "After Call Work" and all "Pending" states.
      v) Show only the agent selectable states associated with the call flow in the dropdown list. Filter out the "Not Ready - Supervisor Initiated" state, if it is retrieved with the list of agent selectable states, and do not allow the user to manually select it.
      vi) Update the dropdown box with any new state received from the Amazon Connect IVR.

(1) If an error is returned when updating the agent state:
   (a) Show an Error popup with text: "Error setting current availability state, please select an availability state."
   (b) Reset the dropdown, so it matches the actual state.
(2) If an error state is received from the IVR, show an Error popup with text: "Something went wrong. Please select an availability state."

d) Add a Status timer showing the time in the current state.
   i) Position the timer to the right of the State dropdown.
   ii) Format the timer with hours, minutes and seconds as hh:mm:ss hiding hours until/unless the timer reaches into hours.
   iii) Reset the timer each time the state changes, unless the new state is a "Pending" state e.g. "Talking > Pending Not Ready – 1. Break".
   iv) Hide this timer when the agent is in the "Talking" state.
e) Add a Log Out icon and text: "Log Out", as a link, at the right end of the header panel.
   i) This link will put the user in the Logged Out/ Offline state and close the application when the user is in a "Not Ready" or "Error" state (except the "After Call Work" state which is a Not Ready state but will be treated differently).
   ii) This link will show a Notice popup when the agent is in the "After Call Work" state or any state other than a "Not Ready" or "Error" state.
      (1) Show the text: "Unavailable from current state" in the popup.
      (2) Add a "Close" button to dismiss the popup.

7. Add a Details panel with no title bar.
   a) Display this panel across the width of the page.
   b) Position this panel below the Header panel.
   c) Retrieve the call details from Amazon Connect when an incoming call is accepted.
      i) If an error is returned when retrieving the call details, show an Error popup with text: "Error retrieving call details."
   d) Add an inner IVR Information panel with no title bar, to show the call details received from the IVR.
      i) Show a green background, when an incoming call has been authenticated thru the IVR.
      ii) Show a red background, when an incoming call is not authenticated.
      iii) Show a dark grey background, when no incoming call is active.
      iv) Note: The Visual IVR portion of the CCP, including the Call Me functionality, will be added in SCR # CIV-103672. Visual IVR functionality currently applies to San Bernardino county only.
      v) Show the text: "Pop Display", when no call information is available.
      vi) Add the following labels and fields, from left to right, with the labels above the data fields:
         (1) "Case#"
         (2) "Customer Name"

(3) "Lang"
(4) "Call Reason"
(5) "Primary"
(6) "County"
(7) "IVR Time"
(8) "Authenticated"

vii) When a part of the IVR information is unavailable, display the label over an empty data field.

e) Add a "Transfer Note:" label and text input box, inside of the Details panel.

i) Position the label below the IVR Information, to the far left of the panel, with the text input box to the right of the label.
ii) Add any incoming Transfer Note to this text input box.
iii) Send any new or edited Transfer Note to Amazon Connect as a call attribute, when a call is transferred.

(1) If an error is returned when adding the Transfer Note, show an Error popup with text: "Error adding Transfer Note." The call will transfer without the note.

iv) The Transfer Note label and text input box will be hidden when there is no active call.

8. Add a 'New Call' bar below the Details panel.

a) This bar will span the width of the page.
b) This bar will be hidden when the agent is on a call (replaced by the Call Controls bar described below).
c) Set this bar as a link to expand or collapse the Phone expandable section (described below).
d) Add a dropdown indicator icon to the far left of this bar.

i) Show an Arrow Pointing Right icon when the Phone expandable section is collapsed.

-OR-

ii) Show an Arrow Pointing Down icon when the Phone expandable section is expanded.

e) Add a Phone icon to the right of the dropdown indicator followed by the text: "New Call".

9. Add a Phone expandable section.

a) This section will span the width of the page.
b) Display this expandable section as a panel, with the 'New Call' bar appearing as a title bar.
c) Add an inner 'List of Contacts' panel to the Phone expandable section.

i) Position the 'List of Contacts' panel at the left side of the expandable section.
ii) Add a title bar labeled: "List of Contacts".
iii) Add a 'Search' text input box.

(1) Add place holder text: "Search".

(2) Filter the list of contacts (described below) to show only items with matching text in one of the fields.
(3) Execute the search as the user types.
(4) Reset the 'Search' box when the Phone expandable section is collapsed.

iv) Add a List of Contacts table.
(1) Add the table column headers:
(a) "Type"
(i) This is the Type of the contact (from the Amazon Connect IVR) e.g. External or Queue.
(b) "Name"
(i) This is the Name of the contact (from the Amazon Connect IVR).
(c) "Destination"
(i) This is the phone number of the contact or the name of the call flow.
(d) Add a Blank Header Row.
(i) Note: This column will hold the 'CALL' or "Transfer" button when a row is selected.
(2) Add sortable column indicator icons below each header. (except for the Blank column header)
(3) Retrieve the contacts for the agent from the IVR and add them to the table. Note: The list of contacts will be retrieved from the Amazon Connect IVR Quick Connects and is outside the scope of this SCR.
(a) If an error is returned when retrieving contacts, show an Error popup with text: "Error retrieving table data."
(b) Add a smaller 'CALL' or 'TRANSFER' button, to activate a call/transfer to the Contact, in the far-right column of each row depending how the dropdown panel was opened.
(i) The 'CALL' button will show when the user opened the dropdown for 'New Call' or 'Consult'. The 'TRANSFER' button will show when the dropdown was opened for 'Direct Transfer'.
(ii) The 'CALL' or 'TRANSFER' button, for the row, will be hidden unless the row is selected.

Note: These smaller buttons will have the same functionality as the larger 'CALL' and 'TRANSFER' buttons described below, except that they will call the contact associated with the selected row.

v) The 'List of Contacts' panel and table will expand vertically to show up to a maximum of 11 rows. After 11 rows are shown, a scroll bar will appear on the right side of the panel to allow the user to view the additional table rows. The 'List of Contacts' panel will be hidden when the Phone expandable section is opened with the 'Key Pad' button.

d) Add a Telephone Number input box at the top right of the Phone expandable section (not inside of the 'List of Contacts' panel).
   i) This input box will accept characters from the keyboard (when this input box is selected) or from the Dialer buttons (described below).
   ii) Add phone Dialer buttons below the Telephone Number input box. Display the buttons in a 3 x 4 grid. Display the alphabetical characters, or a plus sign (+), represented by each number below it in smaller font:
      - 1
      - 2 ABC
      - 3 DEF
      - 4 GHI
      - 5 JKL
      - 6 MNO
      - 7 PQRS
      - 8 TUV
      - 9 WXYZ
      - *
      - 0 +
      - #
   iii) Add the number or primary character represented by the button to the Telephone Number input box, when the button is clicked.
   iv) Add logic to send only dialable characters entered in this box to the phone call i.e. if a non-dialable character is entered do not use it as part of the dialed sequence. Note: Dialable characters are numbers, "*", "+" and "#".
      (1) If the expandable section was opened thru the 'Key Pad' button, send each character as it is entered in the Phone Number input box immediately as they are entered (as touch tones).
      (2) If the expandable section was not opened from the 'Key Pad' button, delay sending the characters until the 'CALL' or 'TRANSFER' button is clicked, or the enter button (on the user's keyboard) is pressed (when the Phone Number input box is selected).

e) Add a 'CALL' button below the Dialer buttons. This button will:
   i) Place any previously active call on hold.
   ii) Dial a new call using the dialable characters in the Phone Number input box.
      (1) If an error is returned when dialing the call, show an Error popup with text: "Error dialing. Please check the number and try again."
      (2) If any error is returned after the call is dialed, show an Error popup with text: "Error with call. Please check the number and try again."
   iii) Collapse the Phone expandable section.
   iv) Hide/remove the 'New Call' bar (if not already hidden) and add/show a Call Controls bar for the call (if not already showing).

v) This button will be hidden when the Phone expandable section was opened with the 'Key Pad' button or the 'Direct Transfer' button (described below).

f) Add a 'TRANSFER' button (inside the Phone expandable section). This button will:
   i) Dial the number in the Phone Number input box.
      (1) If an error is returned when dialing the number, show an Error popup with text: "Error dialing. Please check the number and try again."
   ii) If successfully dialed:
      (1) Immediately conference the previous call(s) with this new call and release the agent from the call.
         (a) If an error is returned when transferring the call, show an Error popup with the text: "Error transferring call. Please try again."
      (2) If the transfer is successful:
         (a) Clear the Phone Number input box and collapse the Phone expandable section.
   iii) This button will only display when the user opened the Phone expandable section with the 'Direct Transfer' button.

g) Add a 'Cancel' button. This button will:
   i) Clear the Phone Number input box.
   ii) Collapse the expandable section.
   iii) This button will be hidden when the Phone expandable section was opened from the 'Key Pad' button.

10. Add a Call Controls bar below the Details panel.
   a) Add logic to darken this bar when the call is on hold.
   b) This bar will be hidden unless the agent is on a call (replaced by the 'New Call' bar).
   c) Add an "On Hold" label and timer at the far left of this bar.
      i) Restart and display this timer each time the call is placed on hold.
      ii) Display these only when the call is on hold.
   d) Add the phone number (or Description of the call as retrieved from the IVR) to the right of the "On Hold" timer. Note: The description of the call is retrieved from the Amazon Connect IVR and outside the scope of this SCR.
   e) Add a "Time On Call" label and timer to the right of the phone number.
      i) When the call request has been sent to the IVR but is not yet connecting display text: "Dialing…", in place of the label and timer.
   f) When the call is connecting display the text: "Connecting…", in place of the label and timer.
   g) Add a group of buttons to the right of the "Time On Call" label and timer. From left to right:
      i) Add a 'Consult' button. This button will:

(1) If a Phone expandable section associated with another call is open, collapse it.
(2) If the Phone expandable section associated with this call is opened:
(a) If opened with this button, collapse it.
(b) If opened with the 'Direct Transfer' or 'Key Pad' button, reset it with:
(i) The 'List of Contacts' panel showing
(ii) The 'CALL' and 'CANCEL' buttons showing
(iii) The 'TRANSFER' button hidden (other elements described below).
(3) If no Phone expandable section is open expand the Phone expandable section for this bar (with the 'List of Contacts' panel and the 'CALL' and 'CANCEL' buttons showing, and the 'TRANSFER' button hidden).
(4) This button will be hidden when the call is on hold or the maximum number of outbound calls has been reached. Note: Amazon Connect supports two concurrent calls (one inbound and one outbound call).

ii) Add a 'Direct Transfer' button. This button will:
(1) If a Phone expandable section associated with another call is open, collapse it.
(2) If the Phone expandable section associated with this call is opened:
(a) If opened with this button, collapse it.
(b) If opened with the 'Consult' or 'Key Pad' button, reset it with:
(i) The 'List of Contacts' panel showing
(ii) The 'TRANSFER' and 'CANCEL' buttons showing
(iii) And with the 'CALL' button hidden (other elements described below).
(3) If no Phone expandable section is open, expand the Phone expandable section for this bar (with the 'List of Contacts' panel and the 'Transfer' and 'Cancel' buttons showing, and 'Call' button hidden).
(4) This button will be hidden when the call is on hold or the maximum number of outbound calls has been reached. Note: Amazon Connect supports two concurrent calls (one inbound and one outbound call).

iii) Add a 'Key Pad' button. This button will:
(1) If a Phone expandable section associated with another call is open, collapse it.
(2) If the Phone expandable section associated with this call is opened:
(a) If opened with this button, collapse it.

        (b) If opened with the 'Direct Transfer' or 'Consult' button, reset it with:
            (i) The 'List of Contacts' panel hidden
            (ii) The 'CALL', 'TRANSFER' and 'CANCEL' buttons hidden (other elements described below).
    (3) If no Phone expandable section is open, expand the Phone expandable section for this bar (with the 'List of Contacts' panel hidden and with the 'Call', 'Transfer' and 'Cancel' buttons hidden).
    (4) This button will be hidden when the call is on hold or when calls are conferenced.

iv) Add a 'Hold' button. This button will:
    (1) Put the call on hold triggering this Call Controls bar to darken.
        (a) If an error is returned when placing the call on hold, show an Error popup with text: "Error with Hold. Please try again."
    (2) This button will be hidden when the call is on hold.

v) Add a 'Mute' button. This button will:
    (1) Mute the agent.
        (a) If an error is returned when muting, show an Error popup with text: "Error with Mute. Please try again."
    (2) This button will be hidden when the call is on hold and/or when the agent is already muted.

vi) Add an 'Unmute' button. This button will:
    (1) Unmute the agent.
        (a) If an error is returned when unmuting, show an Error popup with text: "Error with Mute. Please try again."
    (2) This button will be hidden when the call is on hold and/or the agent is not muted.

vii) Add a 'Retrieve' button. This button will:
    (1) Place any other active call on hold.
        (a) If an error is returned when taking the call off hold, show an Error popup with text: "Error with Hold. Please try again."
    (2) This button will be hidden unless the call is on hold.

viii) Add a 'Transfer' button. This button will:
    (1) Transfer the call to the other active calls. Note: This will Conference all active calls together and release the agent from the call.
        (a) If an error is returned when transferring the call show an Error popup with the text: "Error Transferring Call".
    (2) This button will be hidden unless both the call is on hold and another call is active.

ix) Add a 'Conference' button. This button will:
    (1) Conference all calls together.
        (a) If an error is returned when conferencing the call show an Error popup with the text: "Error conferencing call. Please try again."

(b) Close any open Phone expandable section.

(2) This button will be hidden unless both the call is on hold and another call is active.

h) Add an 'End' button to the far right of the Call Controls bar. This button will:

i) Hang up/release the call associated with the Call Controls bar or cancel a call that is dialing.

(1) If an error is returned when ending or canceling the call, show an Error popup with text: "Error Canceling or Ending the call, please try again."

ii) Hide/remove this Call Controls bar.

i) Add any phone number(s) of conferenced calls as a new row (or rows) under the existing phone number(s) inside the Call Controls bar.

j) Note: When only a single call is active, and it is on hold, the only button available on the Call Controls bar is the 'Retrieve' button. In this case, the call must be taken off hold if a new conference or transfer is needed.

11. Add an additional Call Controls bar and Phone expandable section (collapsed to start) for any new call(s) not conferenced with the others. Note: Amazon Connect supports two concurrent calls (one inbound and one outbound call).

12. Add the following panels below the Phone expandable section. Show these panels in two columns, each spanning half the page width.

a) Agent view, from top to bottom:

i) Agents will see the Queue Statistics and Agent Statistics panels in the left column.

ii) Agents will see the Useful Links and Message Reader panels in the right column.

b) Supervisor view:

i) In addition to the Agent view panels, Supervisors will see the Team Performance' panel as the top left-most panel.

c) Message Sender view:

i) In addition to the Agent view panels, Message Senders will see the Message Sender panel as the bottom right-most panel.

13. Add a 'Team Performance' panel.

a) This panel will only show for the Supervisor view and will be protected by the 'CCPSupervisor' rights. The supervisor rights will be given to users when they are rolled on by the counties.

b) Add a title bar labeled: "Team performance".

c) Add a Team multi-select box for the list of teams to be managed by the supervisor.

i) The select box will:

(1) Allow multiple teams to be selected.

(2) Default to a "Select" option. Note: The Agents table will be empty until the user selects a team.

        (3) Display up to four options (including "Select")
        (4) Show a scroll bar to access any remaining options.
    ii) Retrieve the List of teams managed by this supervisor from Amazon Connect and add the list of teams to the multi-select box. Note: the list of teams comes from a hierarchy defined in the Amazon Connect IVR and is outside the scope of this SCR.
        (1) If no teams are assigned to the supervisor, add the text "None", in the multi-select box.
        (2) If an error is returned when retrieving the list of teams, show an Error popup with text: "Error retrieving Teams."
    iii) Update the Agents table (described below) to reflect the selected team(s).
d) Add an "Include Logged Out Agents" checkbox and label, right of and above the group of buttons below.
    i) Show the label to the right of the checkbox.
    ii) Default the status of the checkbox to Selected.
    iii) Remove agents in the Logged Out/ Offline state if the checkbox is unselected.
e) Add a group of buttons below the Team multi-select box. From left to right:
    i) Add a 'Start Monitoring' button, to allow the Supervisor to listen to the current call of the selected agent. This button will:
        (1) Start a monitoring session for the selected agent's current call, triggering the 'New Call' bar to be hidden.
            (a) If an error is returned when monitoring the call, show an Error popup with text: "Error Monitoring the call, please try again."
        (2) Note: The monitoring session will end if the call ends while monitoring.
        (3) Change the state of the supervisor to "Monitoring".
        (4) Disable the 'Start Monitoring' button and enable the 'End Monitoring' button.
        (5) This button will be disabled unless the selected agent is in the "Talking" state.
        (6) This button will be disabled when the supervisor is in the "Ready" state.
    ii) Add an 'End Monitoring' button. This button will:
        (1) End the monitoring session.
        (2) This button will be hidden unless a call is being monitored.
            (a) If an error is returned when ending the Monitoring session show an Error popup with text: "Error Canceling or Ending the call, please try again."
    iii) Add a 'Ready' button. This button will:
        (1) Change the state of the selected agent to "Ready".

(2) This button will be disabled unless the selected agent is in the "After Call Work" state or any of the "Error", or "Not Ready" states.

(3) If an error is returned when updating the agent's state, show an Error popup with text: "Error setting the agent's availability state, please try again."

iv) Add a 'Not Ready' button:

(1) This button will be disabled when the selected agent is in a "Not Ready" state.

(2) Change the state of the selected agent to "Not Ready – Supervisor Initiated".

(3) If an error is returned when updating the agent's state, show an Error popup with text: "Error setting the agent's availability state, please try again."

v) Add a 'Sign Out' button: This button will:

(1) Log out the selected user changing them to the Logged Out/Offline state.

(2) This button will be disabled if the selected agent is in the Logged Out/Offline state.

(3) If an error is returned when updating the agent's state, show an Error popup with text: "Error setting the agent's availability state, please try again."

f) Add an Agents table:

i) Add the table column headers:

(1) "Agent Name"

(a) This column shows the User-Friendly Display Name of the agent.

(2) "State"

(a) This is the status of the agent.

(3) "Time In State"

(a) This is a timer showing how long the agent has been in the state.

(b) Do not show a timer for logged out agents.

ii) Add sortable column indicator icons below each column header.

iii) Retrieve and update the list of agents from the Amazon Connect IVR based on the Teams multi-select box. Note: The agents included are based on a hierarchy defined in the Amazon Connect IVR and are outside the scope of this SCR.

(1) If an error is returned when retrieving list of agents, show an Error popup with text: "Error Retrieving Table Data."

iv) The 'Team Performance' panel and the Agents table will expand vertically to show up to a maximum of 7 rows. After 7 rows are shown, a scroll bar will appear on the right side of the panel to allow the user to view the additional table rows.

v) Add logic to refresh the data in the table every 30 seconds or less.

14. Add an Agent Statistics panel.

a) Add a title bar labeled: "Today's Agent Statistics"

b) Add an Agent Statistics table, to show statistics for the current user.
   i) Add table column headers:
      (1) Add a blank header spanning two sub-headers:
         (a) “Time Ready”
            (i) This is the total time the agent has been in the “Ready” state.
         (b) “Time Not Ready”
            (i) This is the total time the agent has been in any “Not Ready” state.
      (2) Add an “Inbound Calls” header spanning two sub-headers:
         (a) “Calls”
            (i) This is the number of inbound calls the agent has taken.
         (b) “Handle Time”
            (i) This is the Inbound Calls handle time.
      (3) Add an “Outbound Calls” header spanning two sub-headers:
         (a) “Calls”
            (i) This is the number of outbound calls the agent has made.
         (b) “Handle Time”
            (i) This is the Outbound Calls time.
      (4) Add an “Internal Calls” header spanning two sub-headers:
         (a) “Calls”
            (i) This is the number of internal calls the agent has made or received.
         (b) “Time”
            (i) This is the Internal Calls time.
   ii) Retrieve the Agent statistics data from the IVR and add it to the table.
   iii) Add logic to refresh the data in the table every 15 minutes.
c) Add the time of the latest refresh below the Agent Statistics table on the left side of the Agent Statistics panel.
   i) Add the text: “Data Last Refreshed:” followed by the time the statistics data was refreshed.
   ii) Format the time as hh:mm:ss followed by “AM” or “PM”.
   iii) Reset the time as the data is refreshed.
d) Add an ‘Update’ button to the right of the time. This button will:
   i) Refresh the Agent Statistics table data on demand (with the latest data available).
      (1) If an error is returned when retrieving the table data, show an Error popup with text: “Error retrieving table data.”

15. Add a Message Reader panel.
   a) Add a title bar labeled: “Message of the Day Reader”.
   b) Add a header row.
      i) Add the sender labeled as, “From:”, followed by the name of the message sender. Position these on the left side of the header row.

        ii) Add the time sent labeled as, "Time Sent:" followed by the time and date the message was sent, on the right side of the header row.
    c) Add the message body below the header row.
    d) Add logic to refresh the data in the table every 15 minutes or less.
16. Add a 'Useful Links' panel.
    a) The add the list of links for the specific user's county to the panel.
    b) Clicking a link will open the referenced site in a new window.
17. Add a 'Queue Statistics' panel.
    a) Add a title bar labeled: "Queue Statistics".
    b) Add a Queue Statistics table.
        i) Add table column headers:
            (1) Add a blank header spanning five sub-headers:
                (a) "Queue Name"
                    (i) This is the name of the queue.
                (b) "Calls"
                    (i) This is the number of calls currently in the queue.
                (c) "Max Time"
                    (i) This is the longest time a current call has been waiting in the queue.
                (d) "Ready"
                    (i) This is the number of agents in a the "Ready" state for the queue.
                (e) "Not Ready"
                    (i) This is the number of agents in any "Not Ready" state for the queue.
            (2) Add an "Active" header spanning three sub-headers:
                (a) "In"
                    (i) This is the number of inbound calls currently in the queue.
                (b) "Out"
                    (i) This is number of outbound calls currently in the queue.
                (c) "Other"
                    (i) This is the number of calls that are not inbound or outbound currently in the queue.
            (3) Add a "Wrap Up" header spanning two sub-headers:
                (a) "Ready (Pending)"
                    (i) This is the number of agents pending "Ready" for the queue.
                (b) "Not Ready (Pending)"
                    (i) This is number of agents pending "Not Ready" for the queue.
        ii) Retrieve the Queue statistics data from the IVR and add it to the table.
            (1) If an error is returned when retrieving the queue statistics, show an Error popup with text: "Error Retrieving Table Data."
        iii) The 'Queue Statistics' panel and table will expand vertically to show up to a maximum of 6 rows. After 6 rows are shown, a scroll bar will

appear on the right side of the panel to allow the user to view the additional table rows.

iv) Add logic to refresh the data in the table every 30 seconds or less.

18. Add a Message Sender panel.
    a) This panel will be protected by the 'CCPMessageSender' rights and will be hidden if the user does not have these rights.
    b) Add a title bar labeled: "Message of the Day Sender".
    c) Add a Message text input area.
        i) The Message area should span the width of the panel.
        ii) Add a 'Send' button below the Message area, on the left side of the panel. This button will:
            (1) Send the message to the Amazon Connect IVR.
                (a) If an error is returned when adding the message show an Error popup with text: "Error adding message."
            (2) Constrain the Message text input area to 500 characters.
            (3) Filter out these characters: "<", ">", "/", "\" and "&".

2.3.4 Page Location

NA

2.3.5 Security Updates

Security Rights

Security Right	Right Description	Right to Group Mapping
CCPAgent	Allows access to CCP Home page with the Agent view	CCP Agent
CCPSupervisor	Allows access to the 'Team Performance' panel	CCP Supervisor
CCPMessageSender	Allows access to the Message Sender panel	CCP Message Sender

Security Groups

Security Group	Group Description	Group to Role Mapping
CCP Agent	Users can use the Call Control Panel in a call center	Regional Call Center Staff

Security Group	Group Description	Group to Role Mapping
CCP Supervisor	Users can view and manage team performance in addition to having the use of the Call Control Panel in a call center	Regional Call Center Supervisor
CCP Message Sender	User can update the 'Message of the Day' Call Control Panel	

Note: Local Security administrators (LSA) will need to assign the above groups to appropriate staff and/or security roles.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Security	Security Matrix	SCR 103540 - Security Matrix.xls

4 MIGRATION IMPACTS

SCR # CA-208919 has been created to address this new migration gap.

5 APPENDIX

5.1 Element styles

1) Leave the Home page background white.
2) Panels, unless noted:
   a) Will have a light grey background.
   b) Will have rounded corners.
3) The Header panel:
   a) Will have a dark-blue gradient background.
   b) Will have a white, bold, 16pt font, unless noted.
4) IVR Information panel:
   a) Will have a 16pt bold font.
   b) Will have black font when showing a green background.
   c) Will have white font when showing a red background.
5) Message Reader panel:
   a) The Header row:
      i) Will have black, bold 16pt font.
   b) The Message Body:
      i) Will have black 20pt regular font.
6) Transfer Note label:
      d) Will have black, bold, 16pt font.
7) Buttons, unless noted:
   a) Will have rounded corners, the buttons should be noticeably less rounded than the panels.
   b) Will have a blue gradient background.
   c) Background color of buttons will change to a lighter color when the user hovers the mouse pointer over the button.
   d) Will have a white 16pt regular font.
8) Key Pad buttons:
   a) Will NOT have rounded corners.
   b) Will have a black gradient background.
   c) Will have a black border.
   d) Will have white font.
   e) The Main font will be a 20px font.
   f) The smaller font will be set to 50% of the main font size.
9) CALL button:
   a) Will have a green background.
   b) Will have only slightly rounded corners.
   c) Will have white font.

        i) Font size inside a List of Contacts table row will be 8pt
        ii) Font size under the Dialer buttons will be 12pt

10) CANCEL button:
    a) Will have a dark-red background.
    b) Will have only slightly rounded corners.
    c) Will have white, 12pt font.
11) TRANSFER button (inside the Phone expandable section)
    a) Will have a green background.
    b) Will have only slightly rounded corners.
    c) Will have white font
        i) Font size inside a List of Contacts table row will be 8pt
        ii) Font size under the Dialer buttons will be 12pt
12) End button:
    a) Will have a dark-red background.
13) Unmute button:
    a) Will have a yellow background and black text.
14) Ready button:
    a) Will have a dark-green background.
15) Not Ready button:
    a) Will have a dark-red background.
16) Sign Out button:
    a) Will have a dark-red background.
17) Text input boxes:
    a) Corners will be rounded. These should be slightly less rounded than the buttons.
18) State dropdown box:
    a) The unexpanded dropdown will have a white border.
    b) The dropdown will have bold font.
    c) Corners of dropdown boxes will be rounded. These should be slightly less rounded than the buttons.
    d) The background color of the options should show for the expanded or unexpanded view of the dropdown.
    e) When: red or green background, use a white font.
    f) When: yellow background, use a black font.
19) Title bars, unless noted:
    a) Will have a dark-blue gradient background.
    b) Will have white, bold, 16pt font.
20) New Call bar:
    a) Will have a blue gradient background.
    b) Will have a white, bold, 16pt font.
21) Table column headers:
    a) Will have a blue gradient background.
    b) Will have white, bold, 16pt font.
22) Labels, unless noted:
    a) Will have the same background color as the containing element.

b) Will have a black 16pt font.

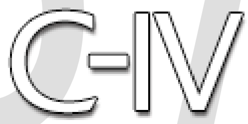
23) On Hold label:
    a) Will have a white, rounded background
    b) Will have a black, regular 18pt font.
24) On Hold timer:
    a) Will have a white, rounded background.
    b) Will have a black, bold 18pt font.
    c) Will be formatted with hours, minutes and seconds as: hh:mm:ss with the hours hidden until/unless the timer reaches into hours.
25) Time on Call label and timer:
    a) Will display in the same format as the 'On Hold' label and timer.
26) Text fields, unless noted:
    a) Will have the same background color as the containing element.
    b) Will have a black 16pt font.
27) Text input fields, unless noted:
    a) Will have a white background.
28) Phone Number (inside Call Controls bar)
    a) Will have a bold, 20pt font.
29) Useful Links:
    a) Will show as underlined text.
    b) Note: The list of Useful links will be retrieved from the Amazon Connect IVR instance associated with the user's county and is outside the scope of this SCR.
30) Popups:
    a) Will have rounded corners.
    b) Will have a title bar with the label centered and formatted with black, bold 16pt font.
    c) Will show over a masking overlay with all other page elements disabled. (clicking the overlay will not close the popup).
    d) Will show message body text in a panel colored background with a black, bold 18pt font.
31) Accept Call popup:
    a) Will have a title bar with a yellow gradient background labeled: "Notice".
    b) Will have an 'Accept Call' button to accept the call and close the popup.
32) Notice popups, unless noted:
    a) Will have a title bar labeled: "Notice" with a yellow gradient background.
    b) Will have the text: "Notice", centered in a black, bold, 16pt font.
    c) Will have a 'Close' button to close the popup.
33) Error popups:
    a) Will have a title bar with a red background labeled: "Error".
        i) Will have a 'Close' button to dismiss the popup.

5.2 Sortable Columns

1) Sortable Columns:

a) Will show the Sortable Column icon for a column when the table is sorted by that column.
b) Will show the Sortable Column Empty icon for a column when the table is not sorted by that column.
c) Sort the table by the column in ascending order when the user clicks the icon the first time.
d) Toggle the sort order, either ascending or descending, if the icon is clicked again.

5.3 Icons

Icon Referenced as:	Icon image:	File Name:
C-IV Logo		civ_logo_trimmed.png
Log Out		icon_logout.png
Phone		phoneicon.png
Arrow Pointing Right		icon_arrowWhiteClosed.png
Arrow Pointing Down		icon_arrowWhiteOpen.png
Sortable Column		icon_sortDescending.png
Sortable Column Empty		icon_sortDescendingEmpty.png

5.4 Useful Links

Note: The URLs will change when c-iv.net is migrated to the cloud. The validity of the links should be checked at the time of this SCR going into production.

County	URL	Link Text
All Counties	https://vim.c-iv.net/portal	eGain Reports

All Counties	https://webchat01.c-iv.net/default/	Live Chat
All Counties	http://paqmwb01a.c-iv.ivr/cwfo/	Calabrio One
Stanislaus	http://ollie/stanworks/internal-processes/csc-processes/	CSC Processes
Stanislaus	http://ollie/stanworks/journal-entry-templates/	Journal Entry Templates
Stanislaus	http://ollie/stanworks/community-resources	Resource & Referrals