



***AMENDED, RESTATED AND REVISED
LEADER REPLACEMENT SYSTEM
AGREEMENT***

***Schedule 15 - (Statement of Work for CalSAWS
Customer Service Center Project) to Exhibit X
(CalSAWS Maintenance and Operations (“M&O”)
Extension)***

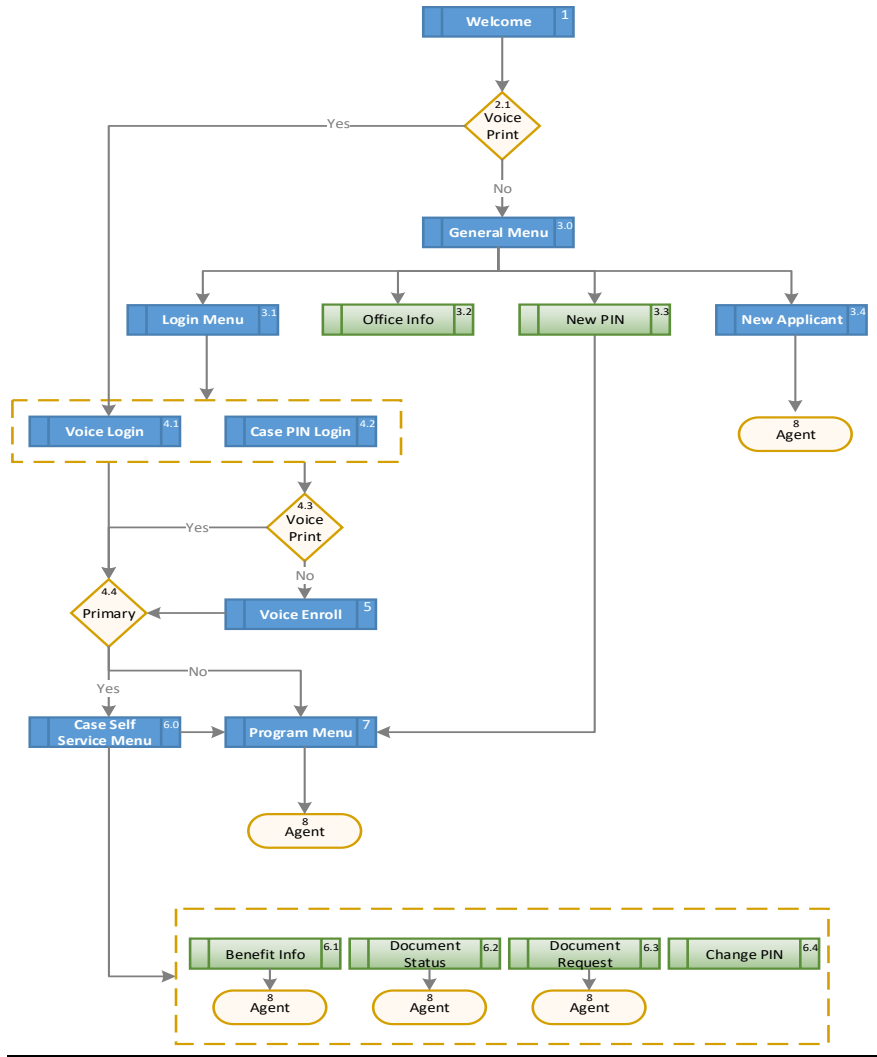
***Attachment 3 (CalSAWS Customer Service Center
Functional Design Business Process Flows)***

**CalSAWS Consortium,
a California Joint Powers Authority**

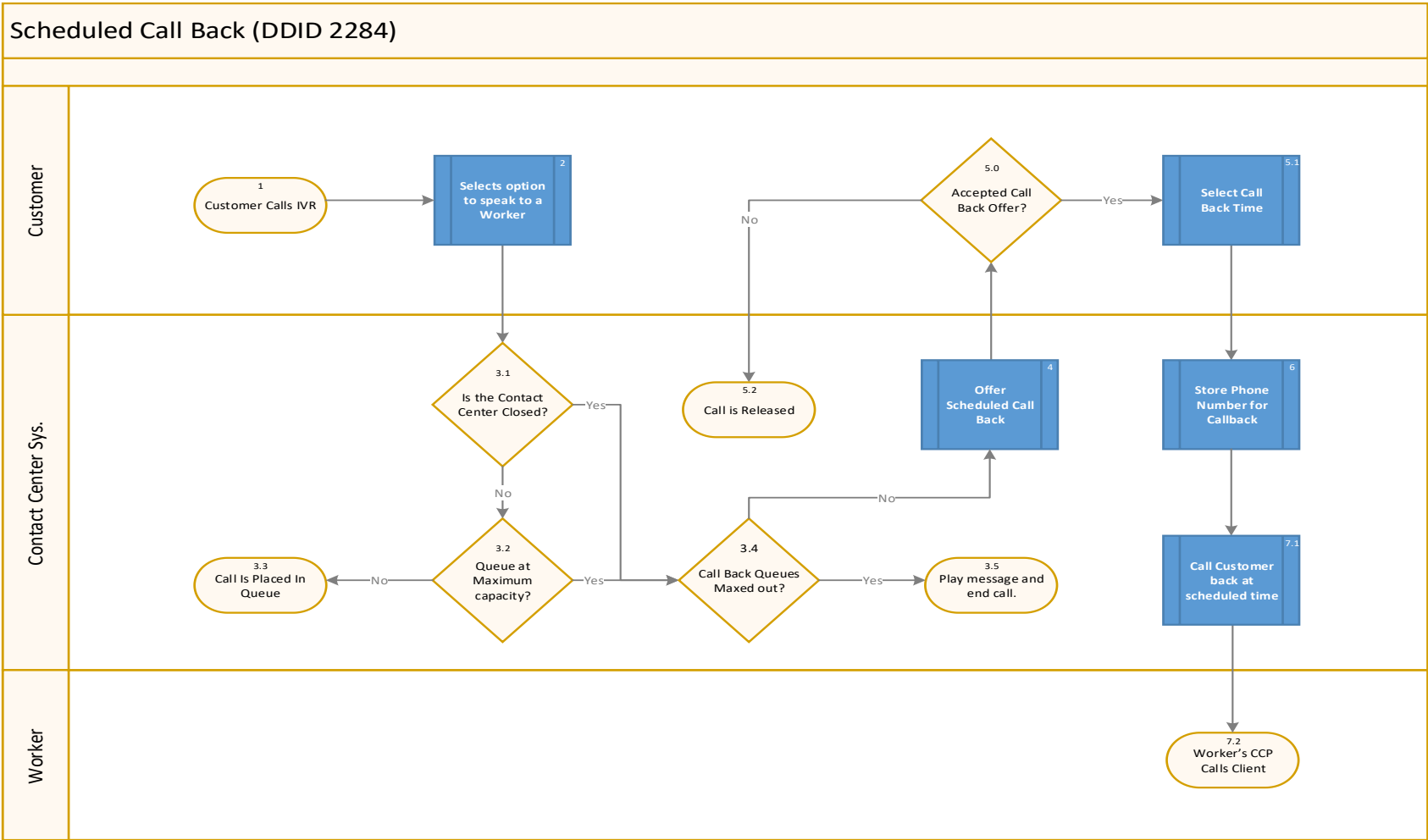
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1. HIGH LEVEL IVR CALL FLOW



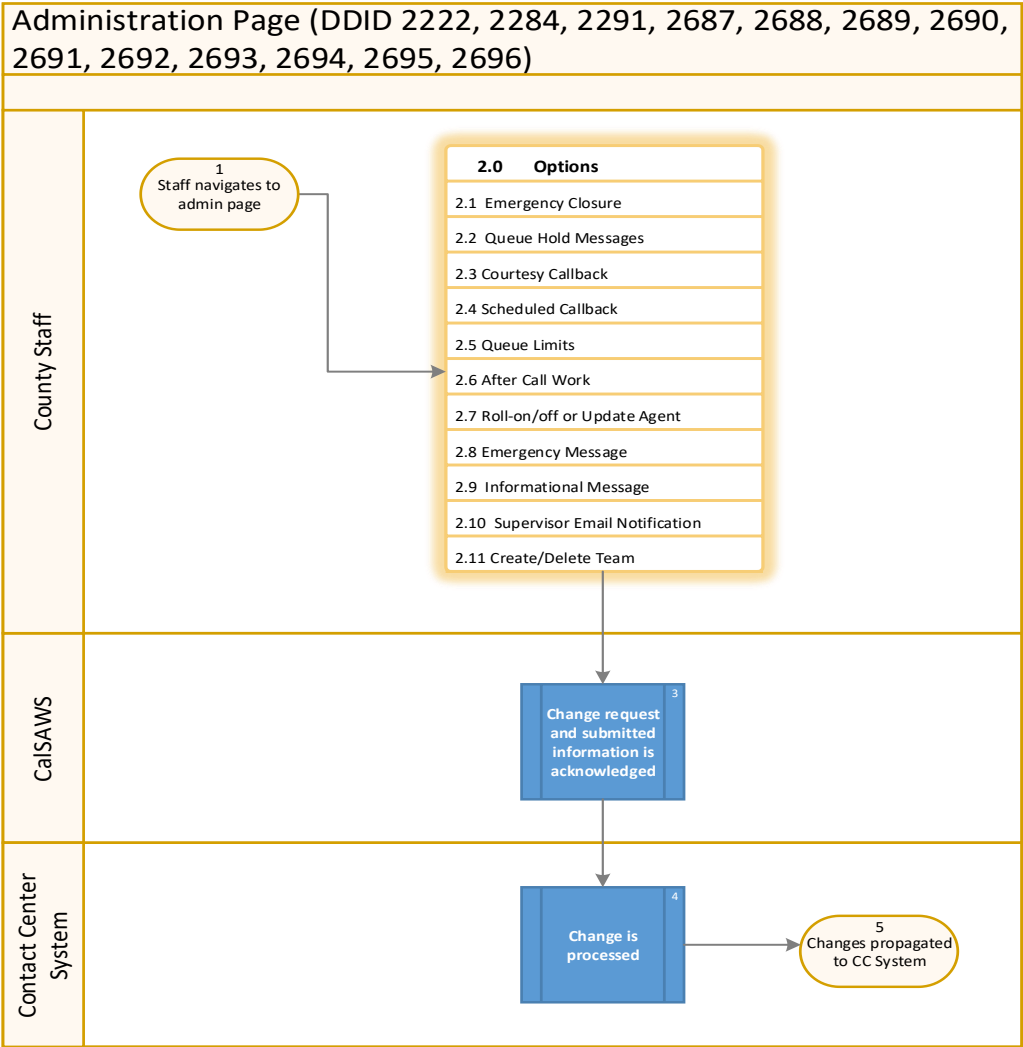
2. SCHEDULED CALLBACK



Step	Responsibility	Description
1	Customer	The Customer calls into the County Contact Center Toll Free Number.
2	Customer	While navigating through the IVR, the Customer selects an option to speak to a worker.
3.1	Contact Center System	The Contact Center System checks to see if the customer is calling within business hours. <ul style="list-style-type: none"> • If Contact Center is closed, proceed to step 3.4. • If the Contact Center is open, proceed to step 3.2.
3.2	Contact Center System	The Contact Center System checks to see if the queue selected is at capacity. <ul style="list-style-type: none"> • If the queue is not at capacity, proceed to step 3.3. • If the queue is at capacity, proceed to step 3.4.
3.3	Contact Center System	The Contact Center System places the call into the queue that was selected in the IVR.
3.4	Contact Center System	The Contact Center System checks to see if all Call Back Queue times are full. <ul style="list-style-type: none"> • If all call back times are at capacity, proceed to step 3.5. • If there are call back times available, proceed to step 4. <p>Note: These limits are controlled by the Administration Page.</p>
3.5	Contact Center System	The Contact Center System plays a Closed, or Maximum queue message depending if the Customer called in during business hours or not and ends the call.
4	Contact Center System	The Contact Center System offers the customer a Scheduled Call Back. <p>Assumption:</p> <ul style="list-style-type: none"> • All Scheduled call backs occur on the next county business day.
5.0	Customer	The Customer can either accept the Scheduled Call Back or not. <ul style="list-style-type: none"> • If the customer accepted the call back offer, proceed to step 5.1 • If the customer does not accept the call back offer, proceed to step 5.2.
5.1	Customer	The Customer is presented an option of available call back time slots. The list of times will be dynamic and only play times that are currently available. <p>Assumption:</p> <ul style="list-style-type: none"> • All time slots will be the same across all counties. • There will be a maximum of eight time slots to choose from, regardless of queue. • The available times will be determined during detailed design.

5.2	Contact Center System	The Contact Center System will play a message and end the call.
6	Contact Center System	The Customer's phone number is stored to a database for Scheduled Call Back.
7.1	Contact Center System	The Contact Center System call request is placed into a call back queue at the customer's selected time.
7.2	Worker	When a worker becomes available, their CTI/Softphone will automatically call the customer directly so they will speak to an agent immediately when the customer answers.

3. ADMINISTRATION PAGE



Step	Responsibility	Description
1	County Staff	<p>The County Staff member navigates to the administration page</p> <p>Assumption:</p> <ul style="list-style-type: none"> • This is a county wide administration page controlled by CalSAWS Security • The county staff member has administration page permissions • There is one level of security permissions to the administration page
2.0	County Staff	<p>The County Staff member selects one of the options listed below depending on the desired action:</p> <ul style="list-style-type: none"> • Emergency Closure: Close and reopen the call center due to emergency <ul style="list-style-type: none"> i. Proceed to step 2.1. • Queue Hold Messages: Messages played to customers when they are in the queue <ul style="list-style-type: none"> i. Proceed to step 2.2. • Courtesy Callback: offering CCB, changing the hours that CCB is offered, and changing the number of minutes a customer needs to wait in the queue before CCB is offered <ul style="list-style-type: none"> i. Proceed to step 2.3. • Scheduled Callback: offering scheduled callback, changing the hours that scheduled callback is offered, and determining how many callbacks are allowed per time slot <ul style="list-style-type: none"> i. Proceed to step 2.4. • Queue Limits: increasing/decreasing the maximum number of calls that can be in a queue (CF, MC, Supervisor...etc.) <ul style="list-style-type: none"> i. Proceed to step 2.5. • After Call Work Limit: increasing/decreasing ACW limit which is the amount of time an agent can process casework before they are forced to be in the 'Ready' status to take another call <ul style="list-style-type: none"> i. Proceed to step 2.6. • Roll On/Off or Update Agent: rolling on and off a worker/agent or changing information of an existing worker/agent <ul style="list-style-type: none"> i. Proceed to step 2.7. • Emergency Message: custom, editable messages to play in the call flow for emergency purposes

		<ul style="list-style-type: none"> i. Proceed to step 2.8. • Informational Message: custom, editable messages to play in the call flow for informational purposes i. Proceed to step 2.9. • Supervisor Email Notification: the ability for county staff members to configure triggers which send them an email notification when certain county staff member-specified conditions (e.g., ten calls waiting) are met i. Proceed to step 2.10. • Create/Delete Team: the ability for county staff members to create new teams or delete existing teams i. Proceed to step 2.11. <p>Assumption:</p> <ul style="list-style-type: none"> • All these actions can be performed directly by the County without involvement from the CalSAWS Project <p>Note: The CalSAWS Project can also perform these tasks for the County.</p>
2.1	County Staff	<p><i>Emergency Closure</i></p> <p>The county staff member performs the following steps:</p> <ol style="list-style-type: none"> 1. Choose to close or open the contact center immediately 2. Click submit <ol style="list-style-type: none"> a. If closing the contact center, they must click the confirmation box <p>Assumption:</p> <ul style="list-style-type: none"> • There is a 1-minute cool down period between changes for the same feature (e.g. If the county staff member just changed a queue's limit, then they must wait at least 1 minute before changing the limit for the same queue) • When a contact center is closed using this feature, it must be reopened using this Admin Page feature, through calling the emergency closure phone number, or by contacting CalSAWS
2.2	County Staff	<p><i>Queue Hold Messages</i></p> <p>The county staff member performs the following steps:</p>

		<ol style="list-style-type: none"> 1. Choose to add a new message or delete an existing message <ol style="list-style-type: none"> a. Add a new message <ol style="list-style-type: none"> i. Enter name for new message ii. Enter text for desired message in respective language fields iii. Click submit b. Delete an existing message <ol style="list-style-type: none"> i. Select message from list of current messages ii. Click delete <p>Assumption:</p> <ul style="list-style-type: none"> • Custom messages will be played through Text-to-Speech, not professional voice talent • Messages have a 260-word limit which is about 120 seconds of audio • There is a maximum of 10 messages to be saved and played • There is 60 seconds of queue music played between each queue message
2.3	County Staff	<p><i>Courtesy Callback</i></p> <p>The county staff member performs the following steps:</p> <ol style="list-style-type: none"> 1. Turn 'On' or 'Off' CCB 2. Enter the start and end times for offering CCB in the respective days of the week fields 3. Enter the number of minutes before CCB is offered to the customer 4. Click submit <p>Assumption:</p> <ul style="list-style-type: none"> • There is a 1-minute cool down period between changes for the same feature (e.g. If the county staff member just changed a queue's limit, then they must wait at least 1 minute before changing the limit for the same queue) • CCB offering end time needs to be at least 30 min. before office hour closing time
2.4	County Staff	<p><i>Scheduled Callback</i></p> <p>The county staff member performs the following steps:</p> <ol style="list-style-type: none"> 1. Turn 'On' or 'Off' Scheduled Callback 2. Enter the maximum number of callbacks offered per Scheduled Callback timeslot 3. Click submit

		Assumption: <ul style="list-style-type: none"> There is a 1-minute cool down period between changes for the same feature (e.g. If the county staff member just changed a queue's limit, then they must wait at least 1 minute before changing the limit for the same queue)
2.5	County Staff	<i>Queue Limits</i> The county staff member performs the following steps: <ol style="list-style-type: none"> Enters maximum number of calls allowed in that specific queue Click submit Assumption: <ul style="list-style-type: none"> There is a 1-minute cool down period between changes for the same feature (e.g. If the county staff member just changed a queue's limit, then they must wait at least 1 minute before changing the limit for the same queue)
2.6	County Staff	<i>After Call Work Limit</i> The county staff member performs the following steps: <ol style="list-style-type: none"> Enters number of seconds allotted for ACW Click submit Assumption: <ul style="list-style-type: none"> There is a 1-minute cool down period between changes for the same feature (e.g. If the county staff member just changed a queue's limit, then they must wait at least 1 minute before changing the limit for the same queue)
2.7	County Staff	<i>Roll On/Off or Update Agent</i> The county staff member performs the following steps: <ol style="list-style-type: none"> Choose to update an existing agent, add a new agent, or delete an existing agent <ol style="list-style-type: none"> Update an existing agent <ol style="list-style-type: none"> Select an agent from list of current agents in system whose information is intended to be updated Choose field to be updated: <ol style="list-style-type: none"> First Name Last Name

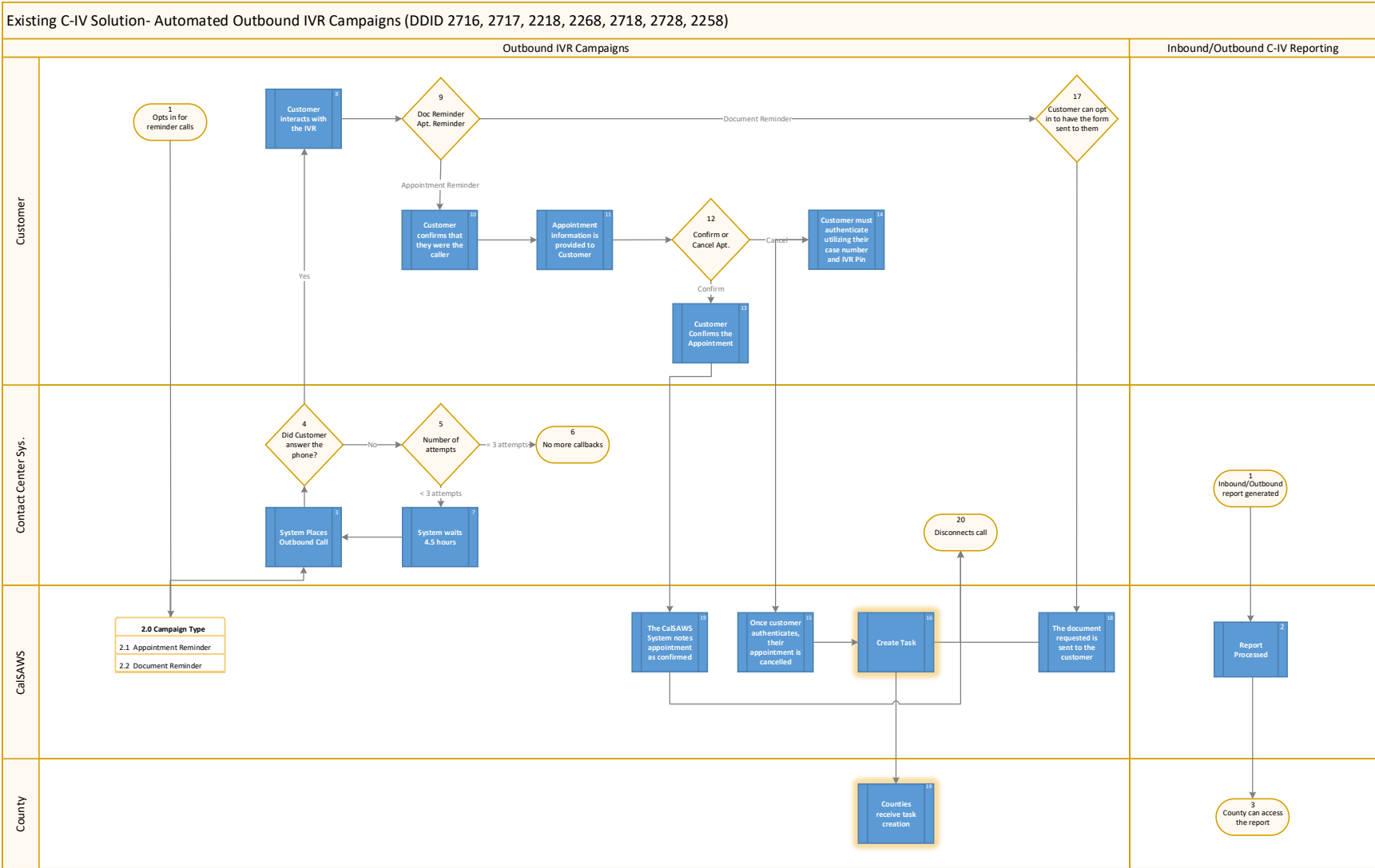
		<ol style="list-style-type: none"> 3. County email address 4. Windows Login ID 5. Team 6. Role <ol style="list-style-type: none"> iii. Enter update to the field iv. Click submit <ol style="list-style-type: none"> b. Add a new agent <ol style="list-style-type: none"> i. Enter first and last name of new agent ii. Enter new agent's CalSAWS ID iii. Enter new agent's county email address iv. Enter new agent's Windows login ID v. Enter new agent's team if applicable vi. Enter new agent's role (agent or supervisor) vii. Enter new agent's initial routing profile viii. Enter new agent's after call work limit ix. Click submit c. Delete an existing agent <ol style="list-style-type: none"> i. Select agent from list of current agents ii. Click delete <p>Assumption:</p> <ul style="list-style-type: none"> • County cannot add a new agent if doing so would exceed the licensing limit for the County • For an agent that is already rolled on to CalSAWS, this feature is to roll them on specifically as a contact center agent • This rolls agents onto contact center cloud, contact center WFM, contact center QA, and contact center reporting system • There is a 1-minute cool down period between changes for the same feature (e.g. If the county staff member just changed a queue's limit, then they must wait at least 1 minute before changing the limit for the same queue)
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		<ul style="list-style-type: none"> For an existing agent/worker, their username/account name cannot be changed as it modifies the CalSAWS account To change the username/account name, the County must first roll off that agent/worker and then roll on the same agent/worker with their new username/account name
2.8	County Staff	<p><i>Emergency Message</i></p> <p>The county staff member performs the following steps:</p> <ol style="list-style-type: none"> Choose to add a new message, delete an existing message, or play a different message <ol style="list-style-type: none"> Add a new message <ol style="list-style-type: none"> Enter name for new message Enter text for desired message in respective language fields Click submit Delete an existing message <ol style="list-style-type: none"> Select message from list of current messages Click delete Play a different message <ol style="list-style-type: none"> Select message from list of current messages Click 'Current Emergency Message' Click submit <p>Assumption:</p> <ul style="list-style-type: none"> Custom messages will be played through Text-to-Speech, not professional voice talent Messages have a 260-word limit which is about 120 seconds of spoken word There is only 1 emergency message that will be played to the customer at any given time When an emergency message is changed or selected using this feature, the change will persist unless changed again Can save up to 10 different emergency messages There is a 1-minute cool down period between changes for the same feature (e.g. If the county staff member just changed a queue's limit, then they must wait at least 1 minute before changing the limit for the same queue)
2.9	County Staff	<i>Informational Message</i>

		<p>The county staff member performs the following steps:</p> <ol style="list-style-type: none"> 2. Choose to add a new message, delete an existing message, or play a different message <ol style="list-style-type: none"> d. Add a new message <ol style="list-style-type: none"> iv. Enter name for new message v. Enter text for desired message in respective language fields vi. Click submit e. Delete an existing message <ol style="list-style-type: none"> iii. Select message from list of current messages iv. Click delete f. Play a different message <ol style="list-style-type: none"> iv. Select message from list of current messages v. Click 'Current Informational Message' vi. Click submit <p>Assumption:</p> <ul style="list-style-type: none"> • Custom messages will be played through Text-to-Speech, not professional voice talent • Messages have a 260-word limit which is about 120 seconds of spoken word • There is only 1 informational message that will be played to the customer at any given time • When an informational message is changed or selected using this feature, the change will persist unless changed again • Can save up to 10 different informational messages • There is a 1-minute cool down period between changes for the same feature (e.g. If the county staff member just changed a queue's limit, then they must wait at least 1 minute before changing the limit for the same queue)
2.10	County Staff	<p><i>Supervisor Email Notification</i></p> <p>Refer to Supervisor Email Notification Document</p>
2.11	County Staff	<p><i>Create/Delete Team</i></p> <p>The county staff member performs the following steps:</p> <ol style="list-style-type: none"> 1. Choose to add a new team or delete an existing team <ol style="list-style-type: none"> a. Add a new team

		<ul style="list-style-type: none"> i. Enter name for new team ii. Click submit <p>b. Delete an existing team</p> <ul style="list-style-type: none"> i. Select team from list of current teams ii. Click confirm delete iii. Click delete <p>Assumption:</p> <ul style="list-style-type: none"> • There is a 1-minute cool down period between changes for the same feature (e.g. If the county staff member just changed a queue's limit, then they must wait at least 1 minute before changing the limit for the same queue) • There is a max of 250 teams a county can have at one time • When a team is deleted, users who were in that team are then disassociated from the deleted team
3	CalSAWS	CalSAWS acknowledges change request and information submitted
4	Contact Center System	The Contact Center System receives the change from CalSAWS and implements the change into the Contact Center System
5	Contact Center System	The changes are reflected in the Contact Center System

4. OUTBOUND IVR CAMPAIGN



Step	Responsibility	Description
1	Customer	The customer opts into outbound self-service.
2.0	CalSAWS	<p>The automated outbound self-service campaign provides appointment reminders and document reminders. Based on the information in the system, automatic calls are sent out to customers. Customers can opt into this type of self service through their worker.</p> <p>The two types of outbound IVR campaign types currently available:</p> <ul style="list-style-type: none"> • Appointment Reminder: used when the customer has an upcoming appointment • Document Reminder: used when the customer has a past due SAR 7 document.
2.1	CalSAWS	<p>Appointment Reminder</p> <p>Requirements for batch job:</p> <ul style="list-style-type: none"> • The batch job finds a customer's appointment date between the high and appointment low dates. Appointment low date is defined as the next business day + 1 day from the batch date. Appointment high date is 3 business days + 1 day from the batch date. • Example: Job XY was ran successfully on 5/27/2020 at 9:00PM. The appointment low date would be 5/29/2020 at 9:00PM and the high date would be 6/2/2020 at 9:00PM. • Appointment types include Meeting with Worker, Group Meeting, Telephone Interview, Re-Evaluation Interview, Telephone CW/CF Re-Evaluation Interview • Appointment status must be "scheduled" or "rescheduled" • Customer must opt in for outbound IVR Campaigns <p>Assumption:</p> <ul style="list-style-type: none"> • Modifications to existing batch jobs will not be made.

2.2	CalSAWS	<p>Document Reminder</p> <p>Requirements for batch job:</p> <ul style="list-style-type: none"> • The batch job finds a document that has a doc_date that is in between the batch date and the batch date + 1 day. • Document reminder is for missed SAR 7 deadline • Customer must opt in for outbound IVR Campaigns <p>Assumption:</p> <ul style="list-style-type: none"> • Modifications to existing batch jobs will not be made.
3	Contact Center System	System places outbound call to customer and the county can configure what # will display on caller ID.
4	Contact Center System	<ul style="list-style-type: none"> • If customer answered the call, proceed to step 8 • If customer did not answer the call, proceed to step 5 <p>Assumption:</p> <ul style="list-style-type: none"> • If the system reaches the Voice Mail(VM), the system assumes it is connected. The system can recognize if it's connected to a fax machine.
5	Contact Center System	<p>The system validates the total outbound call attempts we have had.</p> <ul style="list-style-type: none"> • If the system has had 3 total attempts for the outbound call, proceed to step 6. • If the system has had less than 3 total attempts for the outbound call, proceed to step 7
6	Contact Center System	The system discontinues sending callbacks after 3 total unanswered attempts to the customer.
7	Contact Center System	If the system had less than 3 total attempts, the system waits for 4.5 hours until attempting to call the customer again.
8	Customer	If the customer does answer the phone, the customer then interacts with the IVR.

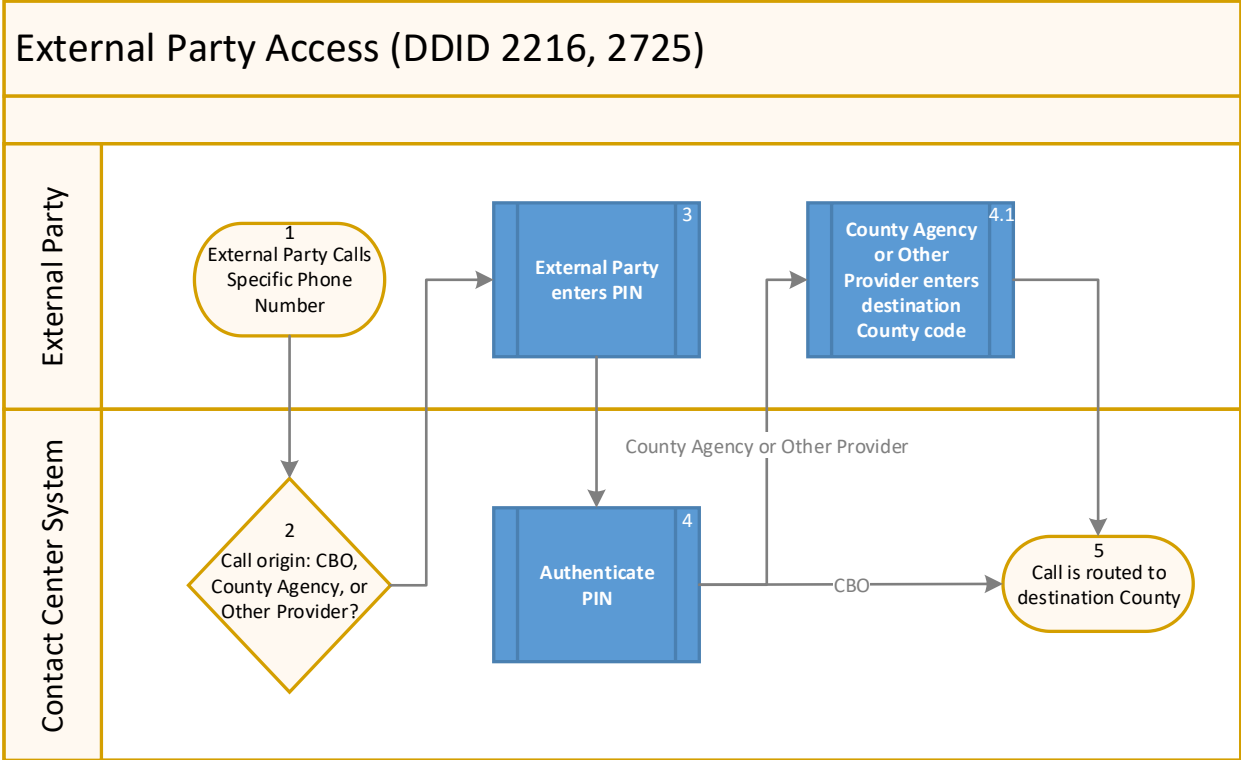
9	Customer	<ul style="list-style-type: none"> • If a customer receives a document reminder, proceed to step 17. • If a customer receives an appointment reminder, proceed to step 10.
10	Customer	The customer confirms they were the caller.
11	Customer	The appointment information is provided to the customer.
12	Customer	<ul style="list-style-type: none"> • If customer confirms the appointment, proceed to step 13. • If the customer cancels the appointment, proceed to step 14.
13	Customer	<p>The customer confirms the appointment.</p> <p>Proceed to step 19.</p>
14	Customer	<p>The customer must authenticate to cancel an appointment by utilizing their case number and IVR Pin.</p> <p>Proceed to step 15.</p>
15	CalSAWS	Once a customer authenticates, the contact center system marks their appointment as cancelled. Proceed to step 16.
16	CalSAWS	<p>If a customer cancels their appointment, the CalSAWS system will create a task.</p> <p>Assumption:</p> <ul style="list-style-type: none"> • Counties can choose to opt in or out to have tasks created for them in CalSAWS • These tasks are only created when a customer cancels their appointment
17	Customer	<p>When the customer receives their document reminder, they have the option to have that form sent to them.</p> <p>Document Options:</p> <p>Outbound: SAR 7</p>

		<p>If the customer has finished hearing the message, proceed to step 16.</p> <p>Assumption:</p> <ul style="list-style-type: none">• The document sent to the customer is the document they initially received & is past due.
18	CalSAWS	The document requested is sent to the customer.
19	Counties	<p>The counties will receive the task created from the customer cancellation.</p> <p>Assumption:</p> <ul style="list-style-type: none">• Counties must opt into this feature in order to receive a task created for them
20	Customer	The CALSAWS System notes the appointment status and the call disconnects.

Inbound/Outbound CALSAWS Reporting:

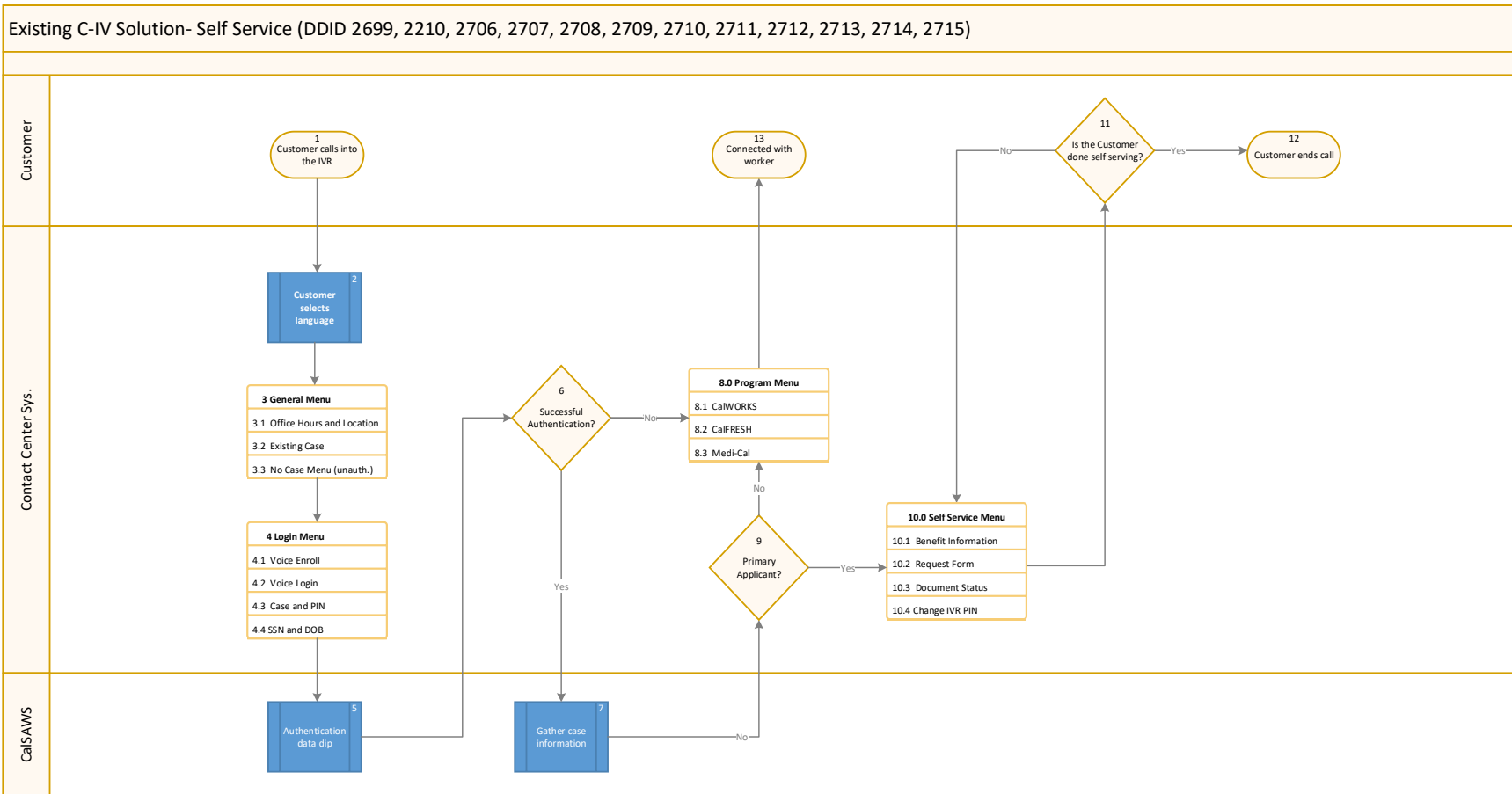
Step	Responsibility	Description
1	Contact Center System	Contact Center System generates an inbound/outbound call report. The automated outbound campaign does come with reporting information. The inbound/outbound call report is generated from the CALSAWS System. This report provides information regarding what type of call it was as well as if whether it was answered by the customer. Users must subscribe within CALSAWS to receive this report. Anyone subscribed to access this report on the CALSAWS application can generate this report at any time. It is generated per request. Any user within the IVR Report security group can access this report.
2	CALSAWS	CALSAWS processes report.
3	County	The county receives these reports.

5. EXTERNAL PARTY ACCESS



Step	Responsibility	Description
1	External Party	The External Party calls a specific phone number. Assumption: <ul style="list-style-type: none"> CBO and authorized representative are not the same role
2	Contact Center System	The Contact Center System checks the inbound call number to determine call origin.
3	External Party	The External Party enters their PIN
4	Contact Center System	The Contact Center System authenticates the caller by their PIN. <ul style="list-style-type: none"> If the phone number belongs to a County Agency, proceed to step 4.1. If the phone number belongs to an Other Provider, proceed to step 4.1. If the phone number belongs to a CBO, proceed to step 5.
4.1	External Party	The External Party or Other Provider enters the destination County's county code.
5	Contact Center System	The call is routed to the destination County.

6. SELF SERVICE AND CALL ROUTING



Step	Responsibility	Description
1	Customer	The customer calls into the IVR.
2.0	Contact Center System	A language selection is made. Assumption: <ul style="list-style-type: none"> The two options currently available are English and Spanish.
3.0	Contact Center System	The General Menu in the Call Flow showcases the following selections: <ul style="list-style-type: none"> Office Hours and Location; proceed to step 3.1 Existing Case; proceed to step 3.2 No Case Menu; proceed to step 3.3
3.1	Contact Center System	The office hours and location menu will give the customer the office hours and location information. An example of a typical prompt would be: Example Verbiage: “The social services offices are in (X city), (y city), and (z city). The (X location) office is located at [insert street address, city, and zip code]. The (X location) office hours are (insert office hours here).”
3.2	Contact Center System	If a customer has an existing case, proceed to step 4.0.
3.3	Contact Center System	When a customer does not have a case number or pin, they select the no case menu in the unauthenticated section. The No Case Menu gives customers two options: <ul style="list-style-type: none"> to apply for benefits ask general questions
4.0	Contact Center System	For customers who have an existing case, they have the following options which will be documented in their own sections: <ul style="list-style-type: none"> 4.1 Voice Enroll Menu 4.2 Voice Login Menu 4.3 Collect Case

		<ul style="list-style-type: none"> 4.4 SSN and DOB
4.1	Contact Center System	<p>Voice Enrollment:</p> <p>Customers who wish to enroll their voice will need a case number and IVR PIN. In order to enroll their voice, customers must repeat the phrase:</p> <p>“My voice is my password, please verify me.”</p> <p>The customer repeats this phrase three times successfully, and the system will generate the customers’ voice print.</p> <p>Assumption:</p> <ul style="list-style-type: none"> Each phrase must be “successful” for the system to capture the voice print, this must be recorded in an environment with little background noise, and the customer must speak clearly. Voice recordings are not saved. They are encrypted and secure.
4.2	Contact Center System	<p>Voice Login:</p> <p>Customers who have already completed voice enrollment may utilize their voice to authenticate. The customer states phrase “My voice is my password. Please verify me.” The system processes their voice print to validate authentication.</p> <p>Proceed to step 5.</p> <p>If a customer is calling in from a phone number that is recognized, they will be immediately sent to the voice login solution. If successfully authenticated, they proceed to the case self-service menu.</p> <p>Assumption:</p> <ul style="list-style-type: none"> Successful voice login is defined as their voice matching their biometric voice print(BVP).
4.3	Contact Center System	<p>Case and PIN:</p> <p>The customer enters their case number and IVR PIN to authenticate.</p> <p>Proceed to step 5.</p>
4.4	Contact Center System	<p>SSN and DOB:</p> <p>Customers may also utilize their SSN and DOB to authenticate in the system.</p>

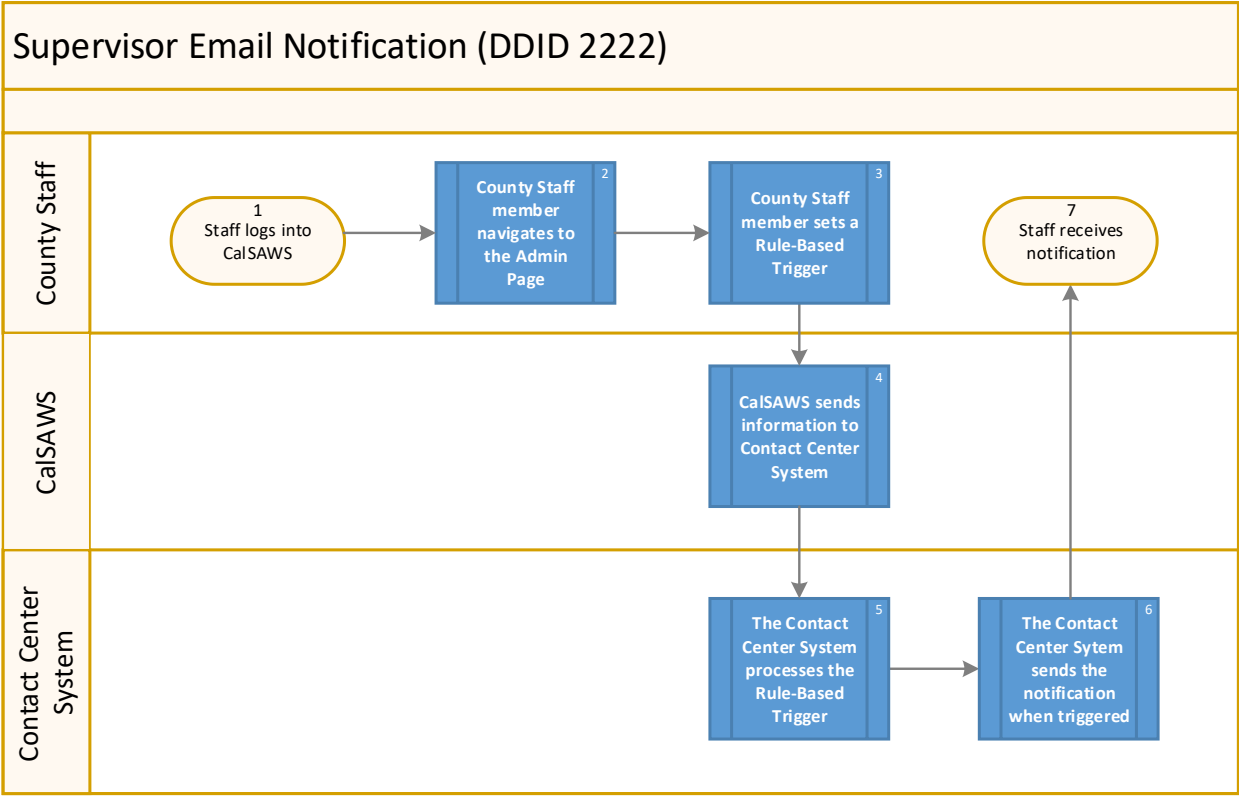
		Proceed to step 5.
5	CalSAWS	The CalSAWS System checks if case number and PIN match. If there's a duplicate PIN for any given case, the system will ask the customer for their date of birth. Proceed to step 6.
6	Contact Center System	Based on the information received from C-IV from the different authentication methods, two of the following outcomes will proceed. <ul style="list-style-type: none"> • If customer successfully authenticates, proceed to step 7. • If customer does not successfully authenticate, proceed to step 8.
7	CalSAWS	Now that the customer is successfully authenticated, the CalSAWS system gathers all the information on the case. This includes: <ul style="list-style-type: none"> • Case Name(s) • Programs • Call Logs Proceed to step 9.
8	Contact Center System	If the Customer does not successfully authenticate, the customer selects options from the Program Menu. This menu consists of the following: <ul style="list-style-type: none"> • CalWORKs, proceed to step 8.1 • CalFresh, proceed to step 8.2 • Medi-Cal, proceed to step 8.3 Assumption: <ul style="list-style-type: none"> • Calls are routed based on routing profiles and queues available in the county.
8.1	Contact Center System	If the customer selects CalWORKs, they will be routed to an agent with that program in their skill group. Proceed to step 13. Assumption: <ul style="list-style-type: none"> • Calls are routed based on routing profiles and queues available in the county.
8.2	Contact Center System	If the customer selects CalFresh, they will be routed to an agent with that program in their skill group. Proceed to step 13. Assumption:

		<ul style="list-style-type: none"> • Calls are routed based on routing profiles and queues available in the county.
8.3	Contact Center System	<p>If the customer selects Medi-Cal, they will be routed to an agent with that program in their skill group. Proceed to step 13.</p> <p>Assumption:</p> <ul style="list-style-type: none"> • Calls are routed based on routing profiles and queues available in the county.
9	Contact Center System	<p>For customers with a successful authentication, the system queries if the customer is a primary applicant on the case.</p> <ul style="list-style-type: none"> • If the customer is a primary applicant, proceed to step 10. • If the customer is not a primary on the case, proceed to step 8.
10	Contact Center System	<p>The customer has the following options to select from the self-service menu:</p> <ul style="list-style-type: none"> • Benefit Information, proceed to step 10.1 • Request Form, proceed to step 10.2 • Document Status, proceed to step 10.3 • Change IVR PIN, proceed to step 10.4
10.1	Contact Center System	<p>Benefit Information:</p> <p>The system offers the programs available. The customer selects the program. The system provides the following program information:</p> <ul style="list-style-type: none"> • CW- CalWORKs • CF – CalFresh • MC- Medical • WTW- Welfare to Work <p>For the CalWORKs Program and CalFresh Program, the customer will receive the following benefit information:</p> <ul style="list-style-type: none"> • Program Status • Total Amount received for this month • If benefits are on hold, the system will notify the customer • If benefits are not on hold, the customer will be notified for what they are eligible to receive in the upcoming month.

		<ul style="list-style-type: none"> • The customer is then given the option to repeat, select another program, or hear other self-service options. <p>For the Medi-Cal Program, the customer will receive the following benefit information:</p> <ul style="list-style-type: none"> • Program Status • Share of Cost <p>For the Welfare to Work Program, the customer will receive the following benefit information:</p> <ul style="list-style-type: none"> • Program Status • WTW Reimbursement Amount <p>Proceed to step 11.</p>
10.2	Contact Center System	<p>Request Form:</p> <p>The system gives the customer a dynamic set of options based on which forms are relevant to their case. They may select a form to request based on the options available in this dynamic menu:</p> <ul style="list-style-type: none"> • Semi-annual report • Transitional Medi-Cal Status report • Passport to services form <p>Proceed to step 11.</p>
10.3	Contact Center System	<p>Document Status:</p> <p>The customer then can check on the status for submitted documentation. The documents you may check status for include the following options:</p> <ul style="list-style-type: none"> • CalWORKs status report • CalWORKs or CalFresh Redetermination packet • CalFresh status report • CalFresh Redetermination packet • Transitional Medi-Cal status report • Medi-Cal Redetermination packet <p>Proceed to step 11.</p>
10.4	Contact Center System	<p>Change IVR PIN:</p> <p>The system gives the customer the ability to change their IVR PIN.</p> <p>Proceed to step 11.</p>

		Assumption: <ul style="list-style-type: none">• IVR PINs such as 1111, or 1234, or non-numeric IVR PINs are not acceptable.• Customer must insert the same IVR PIN twice and they must match. Change to IVR PIN is real-time.
11	Customer	<ul style="list-style-type: none">• If the customer is satisfied with self-service, proceed to step 12.• If the customer is unsatisfied with self-service, return to step 8.
12	Customer	The customer ends the call.
13	Customer	The customer connects to a worker based on the program and language selected in the IVR.

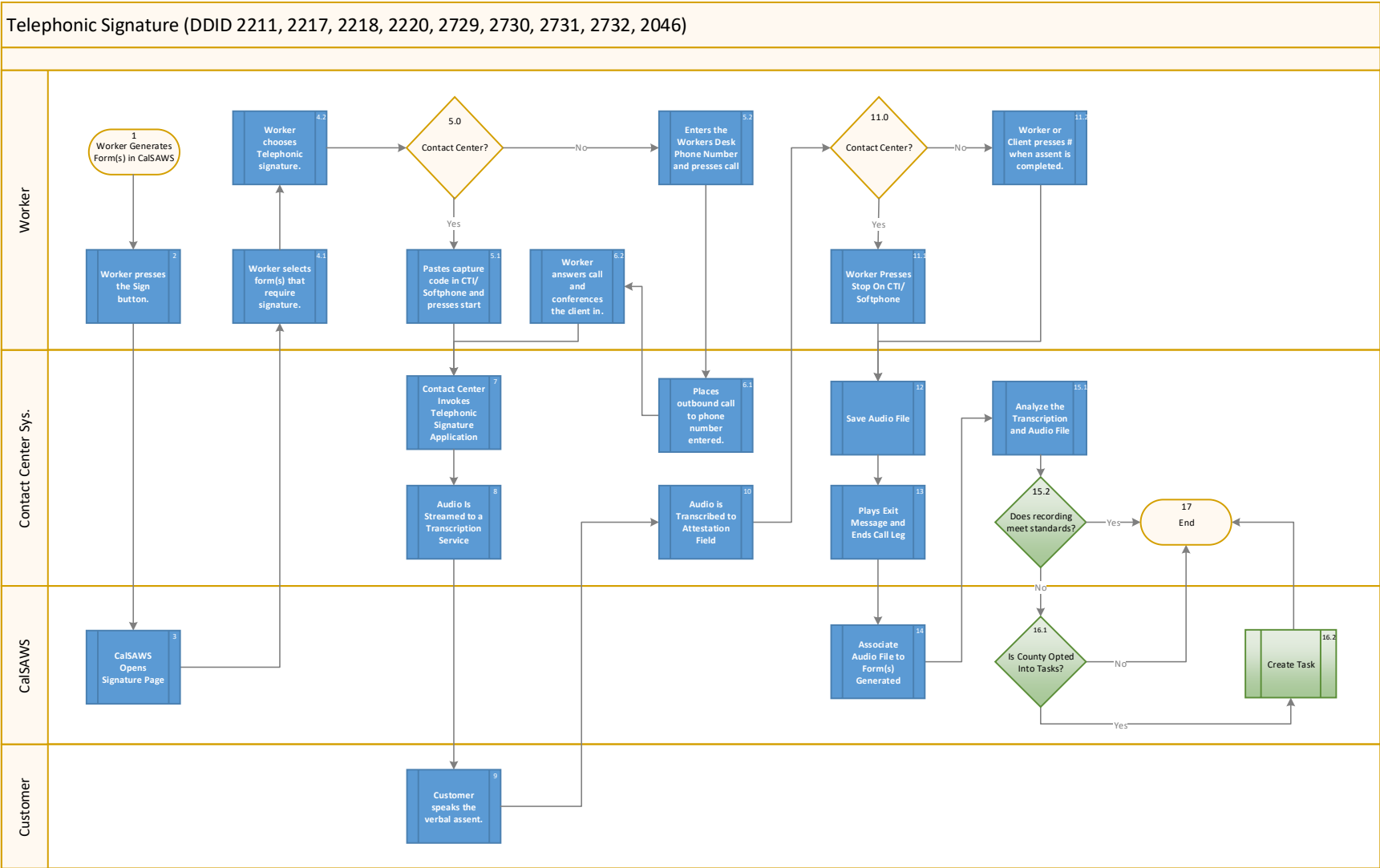
7. SUPERVISOR EMAIL NOTIFICATION



Step	Responsibility	Description
1	County Staff	The County Staff member logs in to CalSAWS.
2	County Staff	<p>The County Staff member navigates to the Admin Page</p> <p>Assumption:</p> <ul style="list-style-type: none"> • This is a county-wide administration page controlled by CalSAWS Security • The County Staff member has administration page permissions
3	County Staff	<p>The County Staff member performs the following steps:</p> <ol style="list-style-type: none"> 1. Choose which metric to set a notification for from the list below <ol style="list-style-type: none"> a. Number of calls waiting in queue <ol style="list-style-type: none"> i. Enter the number of calls for the respective queue to trigger a notification if threshold is surpassed ii. Enter email address(es) to receive the notification b. Longest wait time <ol style="list-style-type: none"> i. Enter amount of time for a call to be in the respective queue to trigger a notification if threshold is surpassed ii. Enter email address(es) to receive the notification c. After Call Work limit <ol style="list-style-type: none"> i. Enter amount of time for an agent to be in the “After Call Work” status to trigger a notification if threshold is surpassed ii. Enter the name of the team of agents that this trigger will apply to iii. Enter email address(es) to receive the notification d. Number of available agents <ol style="list-style-type: none"> i. Enter number of available agents to trigger a notification if the real time number falls below the threshold ii. Enter email address(es) to receive the notification e. Agent Rolled Over Not Ready (RONA) state <ol style="list-style-type: none"> i. Select to turn notification for RONAs ON or OFF <ol style="list-style-type: none"> 1. If ON, continue to step ii below; if OFF, click submit. ii. Enter the name of the team of agents that this trigger will apply to

		<p>iii. Enter email address(es) to receive the notification</p> <p>2. Click submit</p> <p>Assumption</p> <ul style="list-style-type: none"> • There is a 1-minute cool down period between changes for the same feature. • This is an optional self-service feature for individual counties who want to set notifications.
4	CalSAWS	CalSAWS sends the information entered by the County Staff member to the Contact Center System.
5	Contact Center System	The Contact Center System processes information received from CalSAWS.
6	Contact Center System	<p>An email notification is sent out when the rule-based trigger is met.</p> <p>Assumption:</p> <ul style="list-style-type: none"> • The email notification will be sent to all email addresses entered in step 3.
7	County Staff	<p>County Staff member(s) receives an email notification when the rule-based trigger is met.</p> <p>Assumption:</p> <ul style="list-style-type: none"> • All email addresses entered in step 3 will receive the notification.

7.1 TELEPHONIC SIGNATURE



Step	Responsibility	Description
1	Worker	The Worker generates the form or forms that requires a telephonic signature within CalSAWS.
2	Worker	The Worker presses the 'Sign' button within CalSAWS.
3	CalSAWS	The CalSAWS system opens the Electronic Signature page as a new window.
4.1	Worker	The Worker selects from a list of forms recently generated that require a signature and presses next.
4.2	Worker	The Worker selects Telephonic Signature from the list of electronic signature options available.
5.0	Worker	<p>The Worker Selects if they are a Contact Center Worker or if they're using a standard desk phone.</p> <p>Assumption:</p> <ul style="list-style-type: none"> Non-Contact Center Workers (standard desk phone) are required to have access to a phone with conference call functionality.
5.1	Worker	<p>Contact Center Worker:</p> <p>Following the instructions provided in the Telephonic Signature Window, the Worker copies the capture code into the Telephonic Signature field in the CTI/Softphone and presses the Start button.</p> <p>Proceed to step 7.</p> <p>Assumption:</p> <p>The contact center application will support 4-way calling which accounts for language line.</p> <p>The non-contact center workers(standard desk phone) will need to support 4-way calling to include the language line.</p>
5.2	Worker	<p>Non-Contact Center Worker:</p> <p>The Worker enters their phone number in the Phone number field, and their extension in the extension field if applicable and presses the Call button.</p> <p>Proceed to step 6.1.</p>
6.1	Contact Center System	<p>Non-Contact Center Worker:</p> <p>The Contact Center System places an outbound call to the phone number entered and automatically receives the Capture Code from the CalSAWS system.</p>
6.2	Worker	Non-Contact Center Worker:

		<p>The Worker performs the following steps:</p> <ol style="list-style-type: none"> 1. The worker explains that they will be placing the Customer on a very brief hold 2. The worker answers the call from the Contact Center System 3. The worker follows the audio instructions and conferences the customer into a three-way call.
7.1	Contact Center System	The Contact Center System starts the Telephonic Signature application
7.2	Contact Center System	<p>The Contact Center System will play a prerecorded message of the Rights and Responsibilities based on the Documents they will be signing.</p> <p>The forms which require rights and responsibilities:</p> <ul style="list-style-type: none"> - Redetermination - Recertification - Application
8	Contact Center System	The Contact Center System begins to stream the audio to the Transcription Service so attestation can be viewed in text format as well as the Audio format.
9	Customer	<p>After hearing the audio prompt to please speak their verbal assent, the customer will speak the phrase provided to them by both the Worker and the Contact Center System.</p> <p>Assumption:</p> <ul style="list-style-type: none"> • The phrase will be standardized across all counties for analysis purposes.
10	Contact Center System	The audio is transcribed real-time to the transcription field in the Telephonic Signature Capture page currently open.
11.0	Worker	<p>If the Worker is in the Contact Center, proceed to step 11.1.</p> <p>If the user is not in the contact center, proceed to step 11.2.</p>
11.1	Worker	<p>Contact Center Worker:</p> <p>Once the customer has completed the verbal assent, the Worker will stop the recording by pressing the Stop button on the CTI/Softphone.</p> <p>Proceed to step 12.</p>
11.2	Worker	Non-Contact Center Worker:

		After the Customer has completed speaking their verbal assent, the Worker presses the pound (#) key on their phone to stop recording the audio. Proceed to step 12.
12	Contact Center System	Once the recording has stopped the file is saved to be accessed later. Assumption: <ul style="list-style-type: none"> The recording will be less than 60 seconds in length.
13	Contact Center System	After the Audio file has been saved, the Contact Center System will play a success message and hang up. The worker and the customer will still be on the call.
14	CalSAWS	The CalSAWS system associates the recorded file to the document generated, including all metadata, using the capture code that was generated when the Sign button in CalSAWS was pressed. Note: One of the metadata items will be the worker who initiated the telephonic signature from CalSAWS Assumption: <ul style="list-style-type: none"> The workers will have the ability to manually fill in those metadata fields
15.1	Contact Center System	The Contact Center system sends the audio file to be analyzed for quality standards. This process ensures that the Customer spoke the correct phrase, within an acceptable threshold. Assumption: <ul style="list-style-type: none"> The threshold will be determined during the detailed design.
15.2	Contact Center System	After the Contact Center finishes analyzing the Audio file, it will decide if it meets the recording standards. <ul style="list-style-type: none"> If the audio file meets the recording standards, proceed to step 17. If the audio file doesn't meet the recording standards, proceed to step 16.1. Assumption: <ul style="list-style-type: none"> The standards for the audio file will be determined during detailed design.
16.1	CalSAWS	Has the county opted into automatic task generation for telephonic signature? <ul style="list-style-type: none"> If yes, proceed to step 16.2. If no, proceed to step 17.

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16.2	CalSAWS	A task is created and assigned per the rules/configuration in CalSAWS letting them know a Telephonic Signature requires review.
17	Contact Center System	The application ends.