

IVR/CC Committee

February 24, 2021



Agenda

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Overview CalSAWS IVR/CC Project

Requirements

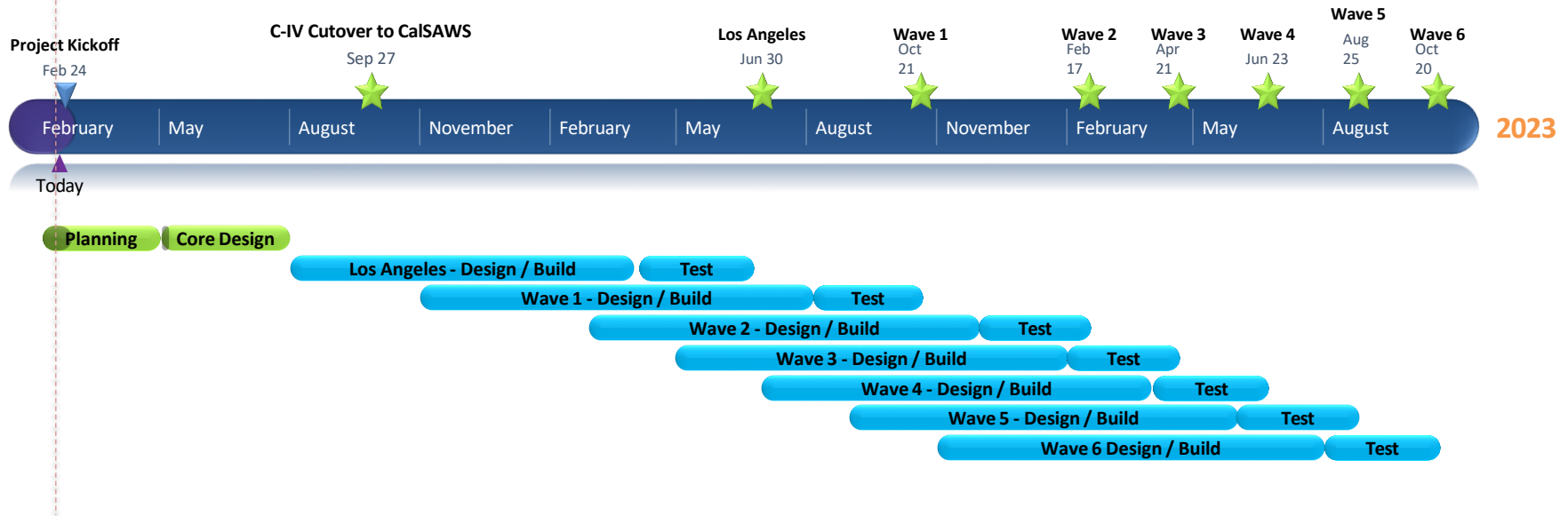
- Total 61 new requirements
 - IVR/Self-Service – 15
 - Outbound IVR – 6
 - External Party Access IVR – 2
 - Telephonic Signature – 9
 - Other Customer Facing CC Related – 2
 - Administration/Configuration – 19
 - Reporting – 5
 - Regional Call Center/Covered California – 2
 - Environments - 1

Above requirements are in addition to
C-IV Existing Functionality

Overview CalSAWS IVR/CC Project

Tentative Timeline

- Not started
- On or ahead of schedule
- Behind Schedule
- At risk



Approach to Detailed Design

Design Review/Approval Flow

- Committee Meetings
 - Review Existing System Functionality
 - Provide overview of existing C-IV Functionality related to the design document to be presented
 - Review Requirement(s)
 - Review the specific requirement(s) that are being addressed in the SCR design document
 - Review SCR Draft Design Documents
 - Walkthrough the design documents
 - Answer questions and gather design feedback from Regional Committee Members (RCMs)
- After Committee Meeting
 - Project team incorporates RCM feedback into draft design documents
 - Design documents are finalized for formal SCR review/approval by RCMs
 - Design Documents are sent to IVR/CC Committee Distribution for Regional Approval (Committee Design Review)
 - RCMs are responsible for getting SME feedback from all counties in their region and submitting a regional vote

Approach to Detailed Design

RCM Responsibilities and Communication with SMEs

Reviewing SCRs in a timely manner and **providing feedback and/or approval** on behalf of their Region by the requested due date. Once provided, the SCR is updated to reflect the recommendation from the Region.

Work collaboratively with the CalSAWS Project and Regions to prioritize and promote SCRs

Record the individual County responses/questions and respond to Analyst on behalf of the entire Region; not just the home County

RCMs will communicate to their Region as follows:

- RCMs sends an **email to their Region's SMEs summarizing the context** of the emails sent from Analysts directly to RCMs/SMEs containing the agendas, minutes, SCRs, in order to solicit direct action/feedback/votes from their Regional SMEs, including a due date, if necessary.
- **SMEs** obtain the vote/comments from their counties and sends any county vote/comments/questions back to the RCM(s).
- RCMs **compile** feedback to determine Regional vote
- RCMs will **communicate regional vote** to the Committee/Project Analyst.
- **If RCMs are not receiving feedback** from the region's SMEs, the RCM will **escalate** to the RM. The RM will work with the appropriate County's PPOC to encourage the SME to have more proactive engagement in the process.



Approach to Detailed Design

Design Requirements Schedule

- Submit for approval as individual designs are completed (not all at the same time)
- Multiple detailed designs per design area
- Follows Existing CalSAWS committee process
 - Additional Committee Meetings may be necessary

Design	Committee Review
WFM/QA/QM reporting	March
Outbound IVR	March
Inbound IVR	March & April
Custom call control panel	April
SSO integration	April
Admin page – security and other features	April
Admin page – agent roll-on/off/update	May
Telephonic signature	May
External party access	May

Individual County Meetings

Kick-off Schedule and Design Period

- Hold individual sessions with LA and each CalWIN County to:
 - Clearly define roles and responsibilities for the County and Project
 - Work with County to define and set due dates for county responsibilities:
 - Call Flows/Reporting
 - Training Strategy
 - Model Office

County Wave	Kickoff Month	Tentative County Design Period	Go-Live Date
LA	July 2021	August 2021 – October 2021	June 30, 2022
CalWIN Wave 1	Oct. 2021	November 2021 – February 2022	October 21, 2022
CalWIN Wave 2	Feb. 2022	March 2022 – July 2022	February 17, 2023
CalWIN Wave 3	Apr. 2022	May 2022 – September 2022	April 21, 2023
CalWIN Wave 4	June 2022	July 2022 – January 2023	June 23, 2023
CalWIN Wave 5	Aug. 2022	September 2022 – January 2023	August 25, 2023
CalWIN Wave 6	Oct. 2022	November 2022 – March 2023	October 20, 2023

Individual County Meetings

County Impact and Responsibilities

- Kick-off and Discovery Sessions:
 - Evaluate current call flows (if applicable)
 - Confirm new call flows
 - IVR, Self-Service, Prompts, Verbiage
 - Reporting Overview

- Training Design Sessions:
 - Evaluate training strategy and modules
 - Confirm training participants and number of sessions
 - Confirm dates for training

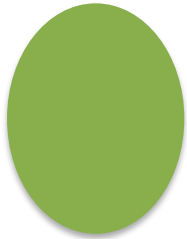
- Model Office Sessions:
 - Evaluate Model Office strategy
 - Confirm Model Office participants and number of sessions
 - Confirm Model Office dates

- Signoffs:
 - Call flow design
 - Training modules, sessions, and dates
 - Model office strategy, sessions, and dates




Existing Functionality Review

CalSAWS CC Existing C-IV Functionality/Features




Existing Functionality Review

C-IV Features



CC Basics



Core Application Integration



Voice Authentication (Log in)




Courtesy Call Back



Web Chat



Post Call Survey



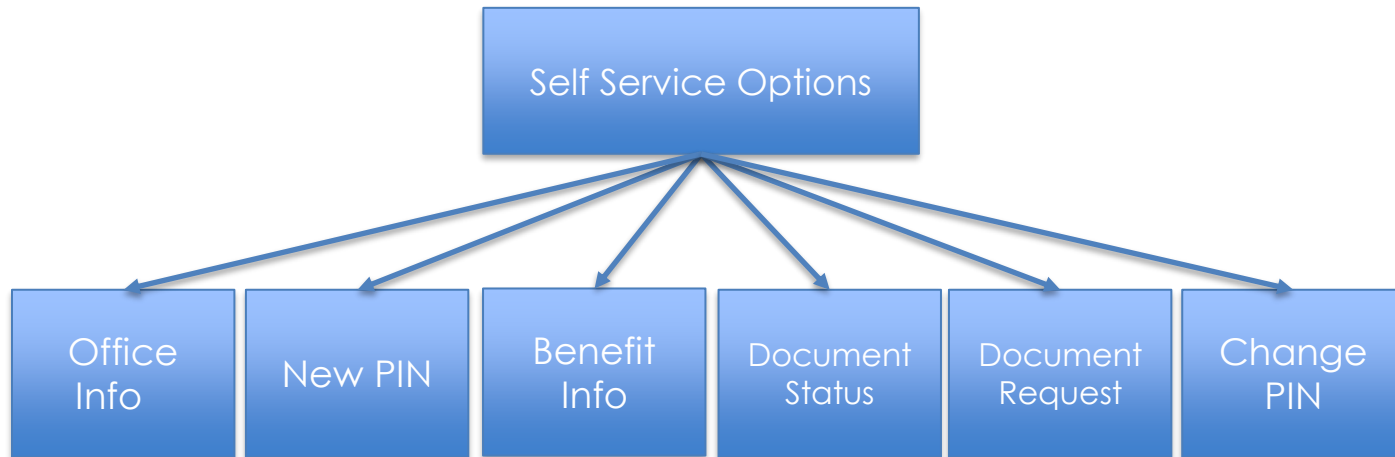
Additional Features

Details and more resources on existing functionality is available here:

[CalSAWS Web Portal: Resources > CalSAWS Migration > Functional Design Sessions > Contact Center](#)

Existing Functionality Review

IVR Self Service



Existing Functionality Review

Automated Outbound IVR Campaigns

- Presenter will share CC FDS_Automated Outbound IVR Campaigns

Features:

- Appointment reminders – used when the customer has an upcoming appointment
- Document reminders – used when the customer has a past due SAR 7 document
- Autodialing
- Customers must opt-in for the above two outbound campaigns
- Can configure what phone number will appear on caller ID
- Voicemail can determine if fax machine has been called
- Integration with CalSAWS for appointment task management
- Basic reporting available

Existing Functionality Review

Call Control Panel (CCP) and Screen Pop

- Call Control Panel
 - Utilizes AWS streaming services and serverless computing to provide supervisors with agent/team/queue performance metrics
 - Utilizes AWS serverless computing to manage messages (Message of the Day and call transfer notes)
 - Existing Custom CCP with upgraded for richer agent experiences
 - ForgeRock Single Sign On (SSO) integration – Same Credentials for CalSAWS, OCAT and other systems.
 - Admin page will be integrated into upgraded CCP
- Call Log
 - When a call comes in, two separate screen pops arise
 - If a customer is authenticated, the worker/agent will see the Case Summary Page and Call Log Page
 - If a customer is unauthenticated, the worker/agent will see the Person Search Page and Call Log Page

Authenticated Customer:	Unauthenticated Customer:
1. Case Summary Page	1. Person Search Page
2. Call Log Page	2. Call Log Page

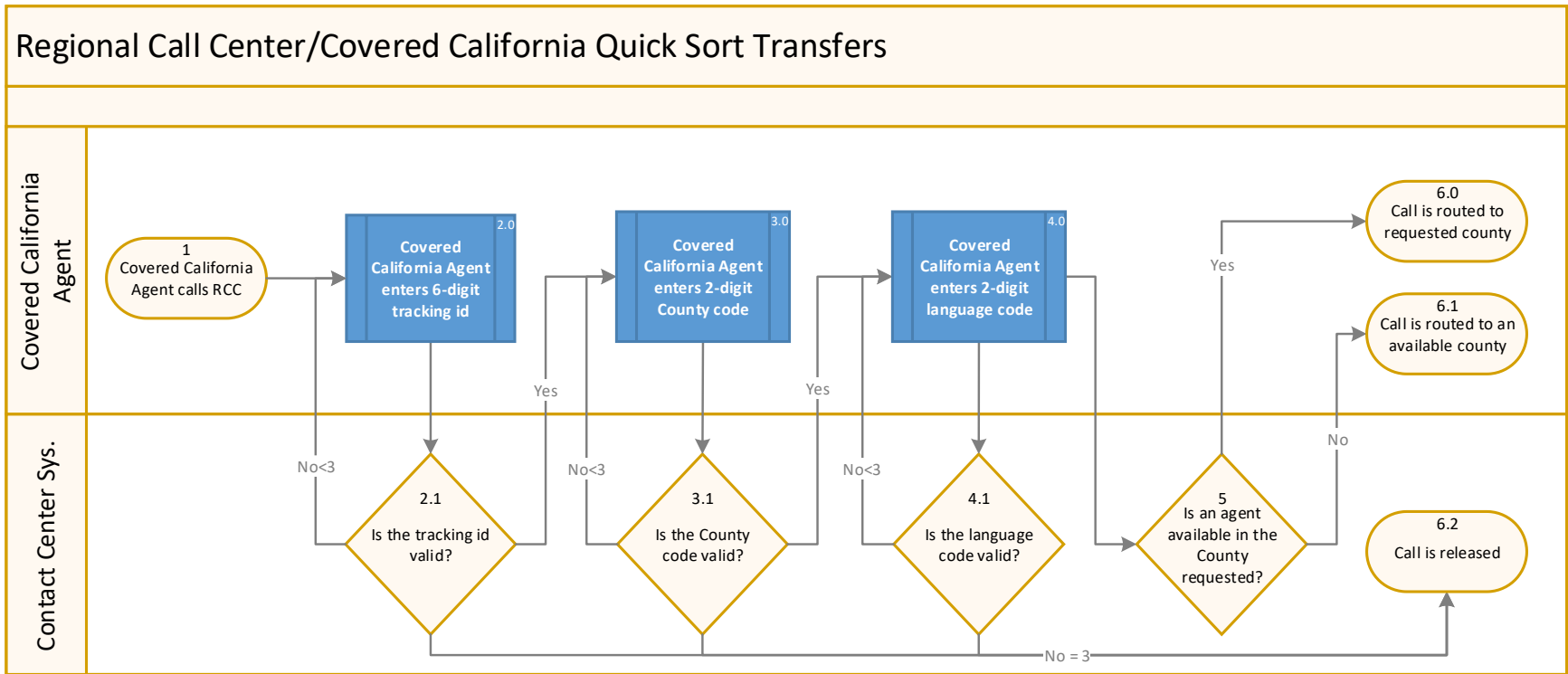
Existing Functionality Review

Regional Call Centers (RCC)

- RCCs handle Covered California Quick Sort Transfers (QSTs)
 - Regional Model
 - 13 RCCs handle calls for the 39 C-IV counties
- RCCs utilize the same centrally managed contact center solution
 - C-IV Application Integration/Screen Pop
 - Call Log and Person Search
- County staff manage staffing to adhere to state monthly SLAs for Covered California calls: 80% of calls handled in 30 seconds. Abandonment rate less than 3%.
- This is not a public facing solution. Phone number and IVR are designed based on Covered California requirements to capture County Code, Language and Tracker/Tracer ID only.
 - Phone number is not published to the public

Existing Functionality Review

Regional Call Centers (RCC)



Existing Functionality Review

Workforce Management

- Workforce Management (WFM)
 - Responsible for forecasting and scheduling agents to ensure the contact center is properly staffed to take inbound calls
 - Sets daily schedules for all agents and schedules vacations, training, coaching sessions, and overtime
 - WFM also provides reporting information to management

- WFM focuses on the following six key processes:
 - Forecasting
 - Scheduling
 - Change Management
 - Analysis
 - Reporting

- The main objective is to ensure enough phone coverage for anticipated calls using forecasting and scheduling resources, and to monitor and report the progress of the contact center

Existing Functionality Review

Quality Assurance

- Call Center Quality Assurance (QA) is a process that can help ensure customer interactions are aligned with business goals. QA monitoring aims to identify the following:
 - Common customer issues
 - Ways to improve the customer experience
 - Standardize processes with customers
- Tools for QA include:
 - Audio Recordings
 - Screen Recordings
 - Evaluation Template to evaluate the workers/agents

Existing Functionality Review

Reporting

- Pre-canned Reports

- County Customizable Reports
 - Subscription to reports
 - Frequency (daily, weekly, monthly)
 - Detailed discussions on individual county reporting needs will be included in County Discovery Session