

CalSAWS | Notes from IVR/Contact Center Committee Meeting

Date: February 24, 2021	Notes Location: Microsoft Teams	
Time: 9:00 am – 12:00 pm	Meeting Called By: Darcy Alexander	
Attendees:	R1 <input checked="" type="checkbox"/> Curt Dodson	R5 <input checked="" type="checkbox"/> Alma Franco
	R1 <input checked="" type="checkbox"/> Esmeralda Rouse	R5 <input checked="" type="checkbox"/> Darrin Kearney
	R1 <input checked="" type="checkbox"/> Moises Martinez	R5 <input checked="" type="checkbox"/> Corrinne Simpson
	R1 <input type="checkbox"/> Monica Castillo	R5 <input checked="" type="checkbox"/> Michael Schmidt
	R1 <input checked="" type="checkbox"/> Norma Feters	R5 <input type="checkbox"/> Judy Nguyen
	R2 <input checked="" type="checkbox"/> Jesse Hallford	R5 <input checked="" type="checkbox"/> Jason Garrett
	R2 <input checked="" type="checkbox"/> Shawna Reed	R6 <input checked="" type="checkbox"/> Andy Nguyen
	R2 <input checked="" type="checkbox"/> Chris Craig	R6 <input checked="" type="checkbox"/> Maria Montoya
	R2 <input checked="" type="checkbox"/> Ilda Torrez Yen	R6 <input type="checkbox"/> Karina Estrada
	R2 <input checked="" type="checkbox"/> Darcy Knox	R6 <input checked="" type="checkbox"/> Irma Sanchez
	R3 <input checked="" type="checkbox"/> Danielle Smith	R6 <input checked="" type="checkbox"/> Jason Reyes
	R3 <input checked="" type="checkbox"/> Joshua Charlton	CS <input checked="" type="checkbox"/> Jared Kuester
	R4 <input checked="" type="checkbox"/> David Mata	CS <input checked="" type="checkbox"/> Stacey Xiong
	R4 <input checked="" type="checkbox"/> Alfredo Jimenez	CS <input checked="" type="checkbox"/> Logan Pratt
	R4 <input checked="" type="checkbox"/> Dwight Bristow	CS <input checked="" type="checkbox"/> Danielle Benoit
	R4 <input checked="" type="checkbox"/> Puninder (Roni) Dhillon	CS <input checked="" type="checkbox"/> Gerald Limbrick
	R4 <input checked="" type="checkbox"/> Valerie Range	CS <input checked="" type="checkbox"/> Matt Lower
		CS <input checked="" type="checkbox"/> John Dray
		CS <input checked="" type="checkbox"/> John Lavayen
		CS <input checked="" type="checkbox"/> Charles Heo
		CS <input checked="" type="checkbox"/> Sam Sway
		CS <input type="checkbox"/> Rhiannon Chin
		CS <input type="checkbox"/> Erick Arreola
		CS <input checked="" type="checkbox"/> Alan Giblin
		CS <input checked="" type="checkbox"/> TJ Singh
		CS <input type="checkbox"/> Don Coffey
		CS <input type="checkbox"/> Carlos Cuenca - Grady's Team
		CS <input type="checkbox"/> Julie Conwell – RM Sponsor
		CS <input checked="" type="checkbox"/> Jennifer Hobbs - RM
		CS <input type="checkbox"/> Sherice Sterling – CDSS

Notes Taken By: Region # 1 – Curt Dodson – Contra Costa County

Agenda Topic:

Important Points

Welcome Detailed Session Kick-off
Charles Heo Introduced

- Roll Taken

Meeting Notes:

- Region Identified as the one responsible for taking notes.

- Region #1
- Notes are due to the Contact Center Facilitator (Darcy) on March 3, 2021

Overview for CalSAWS IVR/CC Detail Design:

- Danielle Benoit and John Dray presented the “Kickoff and Overview” for the CalSAWS Contact Center/IVR Committee
- 58 Counties in the CalSAWS Consortium constitute “The Power of 58”
- Danielle went over RCM responsibilities for Committee Meetings - Reminder - CalSAWS policy: Only Regional Committee Managers (RCMs) can talk/chat/vote during Committee Meetings and need to raise their hand to request to talk.
- Participants must mute their phone/microphone when not speaking.

- **Guiding Principles are:**
 - **Develop Collaborative Support/Communication:** Establish and maintain transparent, collaborative working relationships
 - **You are empowered to make decisions** on behalf of your Region
 - **Primary focus is to clarify the functionality** being requested through the existing CalSAWS requirements and not to solicit new requirements
 - **Focus is on what is needed** and less on how it happens
 - **Seek to understand** county processes and individual functionality
 - **Utilize the established escalation processes as needed**

 - **Review Requirements**
 - **Review Draft Design Documents of Changes**

 - **Approach for Completing Detailed Design**
 - **Review Existing System Functionality**
- Contact Center/IVR Functional Requirements – In addition to existing functionality, 61 new requirements were identified, in areas such as Inbound & Outbound Calling, External Party Access, Telephonic Signature, other customer facing requirements, and Administration and Configuration functions.
 - Counties participated in Functional Design sessions and reviewed and updated these requirements in June 2020.
 - Contact Center existing high level functionality and new requirements were presented and summarized in the presentation on the CalSAWS Web Portal at: [CalSAWS Web Portal: Resources> CalSAWS Migration> Functional Design Sessions> Contact Center](#)

 - Contact Center/IVR existing high level functionality and new requirements were presented and summarized in the presentation on the CalSAWS Web Portal at: <https://calacesorg.sharepoint.com/:f:/r/sites/MigWebPortal/Resources/CalSAWS%20Migration/Functional%20Design%20Sessions/Contact%20Center?csf=1&web=1&e=gYFci>

Agenda Topic:

Important Points

○ Review Draft Detailed Designs

- The Detailed Design sessions will define the details and processes needed to fulfill the 61 new requirements, but the actual number of change documents will almost certainly be less than 61.
- Review each draft detailed design and document changes needed.
- After each Committee meeting, the Detailed Design documents will be updated and sent out. RCMs must forward the Design docs to the SMEs and comments, questions, and/or concerns communicated to the Contact Center Committee. If there are lots of questions/concerns, a Design Document may be re-updated and sent out again.
- John Dray Presented Existing Functionality Review
- John Lavayen went over the Existing Functionality Details
- Jared to go over Automated IVR Campaigns displayed via VISO Call flow. Also, CCP Functionality, RCC Functionality and WFM Functionality and Reporting.

• Design Requirements Schedule

Meeting Date	Time	Venue
03/24/2021	9 – 12	MS Teams
04/7/2021	9 – 12	MS Teams
04/28/2021	9 – 12	MS Teams
05/12/2021	9 – 12	MS Teams
05/26/2021	9 – 12	MS Teams
06/9/2021	9 – 12	MS Teams
06/23/2021	9 – 12	MS Teams

• Individual County Meeting Schedule

- Individual design sessions for customized features such as “Model Office” and Call Flows will be held with Los Angeles County and CalWIN Counties.
- These meetings are tentatively scheduled for 11/2021 through 2/2022.
- Danielle asked about additional Committee Meetings for the Design Sessions – Committee responded to Danielle that they would prefer all meetings scheduled now.
- Danielle went over potential dates for individual County Meetings for LA and CalWIN Counties
- Danielle talked about the Individual County Responsibilities during Individual County Meetings

#	Action Item	Assigned To	Assigned Date	Due Date	Status
1	Send out additional meetings Invites to Committee	Darcy	2-24-21	2-25-21	Sent 2-2-21
2	Send out RCM PowerPoint to Committee	Darcy	2-24-21	2-25-21	Sent 2-24-21

Next Scheduled Meeting – Teams - March 24, 2021 9:00 AM – 12:00 PM:

Region 2 will be responsible for meeting notes.

Proposed Monthly Meeting Schedule:

Meeting Date	Meeting Time	Venue
March 24, 2021	9:00 AM – 12:00 PM	Microsoft Teams
April 7, 2021	9:00 AM – 12:00 PM	Microsoft Teams
April 28, 2021	9:00 AM – 12:00 PM	Microsoft Teams
May 12, 2021	9:00 AM – 12:00 PM	Microsoft Teams
May 26, 2021	9:00 AM – 12:00 PM	Microsoft Teams
June 9, 2021	9:00 AM – 12:00 PM	Microsoft Teams
June 23, 2021	9:00 AM – 12:00 PM	Microsoft Teams

Note: Additional Meeting dates and times may be required.