

# CalSAWS | Notes from IVR/Contact Center Committee Meeting

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

**Notes Taken By:** Region # 2 – Sutter County - Jesse Hallford

| Agenda Topic:  | Important Points   |
|--|--|
| <b>Welcome</b>   | <ul style="list-style-type: none"> <li>Roll Taken</li> </ul>   |
| <b>Meeting Notes:</b> <ul style="list-style-type: none"> <li>Region 2 Identified as the one responsible for taking notes.</li> </ul> | <ul style="list-style-type: none"> <li>Region #2</li> <li>Notes are due to the Contact Center Facilitator on March 31, 2021</li> </ul>   |
| <b>SCR CA-226209 WFM/QA/QM Reporting Design:</b>   | <ul style="list-style-type: none"> <li>Presentation of the Design Document</li> <li>100% audio recordings retained and 25% screen recordings. Screen recordings chosen at random. Counties can hear and see 100% of audio and screen during the same day but 75% of screen purged overnight. Screen recordings only show while agent is on a call no after call work is recorded.</li> <li>Question regarding longer retention of recordings, they can be tagged and kept for 6 months or can be downloaded to user's computer.</li> <li>Question if remote staff can still have screen recordings done. Answer is yes if the software is</li> </ul> |

## Agenda Topic:

## Important Points

installed on remote equipment. All audio is recorded for remote staff.

- Demo planned for next Committee Meeting of e-Gain Analytics, Calabrio One, and the Amazon Console.
- Reviewed DDID Requirements
- No change for C-IV counties

## SCR CA-226207 Outbound IVR Design:

- Presentation done from the Design Document
- Action Item taken for Call Flow for the rescheduled appointments
- Question asked about the SAR 7 being marked incomplete and if the X NOA has been sent we do not at this time call again if SAR 7 marked incomplete and the Y NOA sent. Action Item to research if a call can be created for the Y NOA.
- Question asked about changing the IVR display number using a county phone number. Phone number at this time must be operated by Amazon Connect – CIT will go out in the future to request county feedback.
- C-IV counties have questions regarding languages and other new options would like to have meetings scheduled with Project.
- Reviewed DDID Requirements.

| #  | Action Item  | Assigned To     | Assigned Date | Due Date  | Status                          |
|----|--|-----------------|---------------|-----------|---------------------------------|
| 1. | Outbound IVR – Incomplete Reminder Call (NA 960Y)  | Darcy Alexander | 3/24/2021     | 4/7/2021  | Future Enhancement CER Required |
| 2. | Discussion on using Toll Free numbers – Not porting them over but using those numbers as caller ID that are county owned and not in Amazon Connect | John Dray       | 3/24/2021     | 5/12/2021 |                                 |

|    |   |                 |           |          |   |
|----|---|-----------------|-----------|----------|---|
| 3. | Meeting with each Counties regarding reschedule call flow | Darcy Alexander | 3/24/2021 | 4/7/2021 | Topic will be addressed during individual County Meetings |
|----|---|-----------------|-----------|----------|---|

**Next Scheduled Meeting – Teams – April 7, 2021 9:00 AM – 12:00 PM:**

Region 3 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.**

