

CalSAWS | Notes from IVR/Contact Center Committee Meeting

Date: June 9, 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 R1 <input checked="" type="checkbox"/> Esmeralda Rouse R1 <input checked="" type="checkbox"/> Nancy Rodriguez R1 <input checked="" type="checkbox"/> Monica Castillo R1 <input checked="" type="checkbox"/> Norma Feters R2 <input checked="" type="checkbox"/> Jesse Hallford R2 <input checked="" type="checkbox"/> Shawna Reed R2 <input checked="" type="checkbox"/> Chris Craig R2 <input checked="" type="checkbox"/> Ilda Torrez Yen R2 <input checked="" type="checkbox"/> Stacy Bruemmer R3 <input checked="" type="checkbox"/> Danielle Smith – R3 <input checked="" type="checkbox"/> Joshua Charlton R4 <input checked="" type="checkbox"/> David Mata R4 <input checked="" type="checkbox"/> Alfredo Jimenez R4 <input checked="" type="checkbox"/> Dwight Bristow R4 <input checked="" type="checkbox"/> Puninder (Roni) Dhillon R4 <input type="checkbox"/> Mark McAlister	R5 <input checked="" type="checkbox"/> Alma Franco R5 <input checked="" type="checkbox"/> Cori Robertson R5 <input checked="" type="checkbox"/> Corrinne Simpson R5 <input checked="" type="checkbox"/> Michael Schmidt R5 <input checked="" type="checkbox"/> Jason Garrett R6 <input type="checkbox"/> Andy Nguyen R6 <input checked="" type="checkbox"/> Maria Montoya R6 <input checked="" type="checkbox"/> Karina Estrada R6 <input type="checkbox"/> Irma Sanchez R6 <input checked="" type="checkbox"/> Jason Reyes CS <input type="checkbox"/> Jared Kuester CS <input checked="" type="checkbox"/> Stacey Xiong CS <input checked="" type="checkbox"/> Logan Pratt CS <input checked="" type="checkbox"/> Danielle Benoit CS <input type="checkbox"/> Gerald Limbrick CS <input type="checkbox"/> Matt Lower
		CS <input checked="" type="checkbox"/> John Dray CS <input type="checkbox"/> John Lavayen CS <input checked="" type="checkbox"/> Charles Heo CS <input 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 checked="" type="checkbox"/> Don Coffey CS <input type="checkbox"/> Carlos Cuenca - Grady's Team CS <input checked="" type="checkbox"/> Julie Conwell – RM Sponsor CS <input type="checkbox"/> Sherice Sterling – CDSS

Notes Taken By: Region # 1 Responsible for Meeting Notes –

Agenda Topic:	Important Points
Welcome/New Members: Stacy Bruemmer – Region 2	<ul style="list-style-type: none"> Introduction done for new members
Meeting Notes: <ul style="list-style-type: none"> Region 1 Identified as the one responsible for taking notes. 	<ul style="list-style-type: none"> Region #1 Notes are due to the Contact Center Facilitator on June 16, 2021
<ul style="list-style-type: none"> Action Item from May 26, 2021 Meeting: <ul style="list-style-type: none"> N/A 	<ul style="list-style-type: none"> Contact Center Team
<ul style="list-style-type: none"> Review SCRs from May 26th Meeting <ul style="list-style-type: none"> SCR CA-226672 – Administration Page Design 	<ul style="list-style-type: none"> Reminded Committee Votes are due by end of day on June 18, 2021.
<ul style="list-style-type: none"> SCR CA-226837 – Inbound IVR 	<ul style="list-style-type: none"> Contact Center Team Review of SCR including Overview, Recommendations, Supporting Documents & Requirements.

- This SCR serves as baseline for design of CalWIN counties – beginning discussions with counties. For existing C-IV counties, they will have option to add different languages if needed. They will start developing schedule to reach out to C-IV counties.
 - Languages will be supported for any counties needing them. Recorded by voice talent. Options will be in language menu – determined by each county.
 - This doesn't pertain to the GA program clients at this time.
 - Q: Will the CF & CW IVR be the same queue?
A: The queues will be determined by each county – will work with each county to determine.
 - Q: Can callers speak to agent if they haven't authenticated? A: Yes, but each county will decide their own call-flow.
 - Q: For customers to get self-service option for specific programs (like WTW), does the IVR need a specific queue to be set up? A: The queue is only relevant when a caller requests to speak to a worker. Most counties call centers don't support WTW, but system can look up who the worker is, and call can be routed to that worker. That can be discussed with each county individually.
 - Due to new case numbers in CalSAWS, callers will be linked to IVR using their listed phone number & PIN instead of case number.
 - The C-IV counties will no longer have the ability to see the client's PIN in CalSAWS.
 - Primary applicant refers to both adults in case
 - Q: Will additional languages in IVR be tied to languages supported in Call Center? A: Each county will have options on how that will work.
 - There will be option for Queue to provide estimated wait time to caller.
 - When caller is in CCB queue, the call will be counted against the queue wait time.
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Agenda Topic:

Important Points

- Q: Will Passport to Services upload to BenefitsCal once customer requests it in the IVR? A: Yes, it will.
- Q: For CF and CW, is it the amount received for the month? If benefits are not on hold, it'll be for the upcoming month. If they are on hold, it will only play for that particular month. A: Verbiage in design document can be reviewed and clarified in document – is it benefits already received or going to be received?
- Q: When is this SCR slated for release? A: For C-IV counties, they will discuss release for each county. For CalWIN and LA counties, it'll be when they go live.

#	Action Item	Assigned To	Assigned Date	Due Date	Status
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Next Scheduled Meeting – Teams – June 23, 2021 9:00 AM – 12:00 PM:

Region 2 will be responsible for meeting notes.

Proposed Monthly Meeting Schedule:

Meeting Date	Meeting Time	Venue
June 9, 2021	9:00 AM – 12:00 PM	Microsoft Teams
June 23, 2021	9:00 AM – 12:00 PM	Microsoft Teams
July 7, 2021	9:00 AM – 12:00 PM	Microsoft Teams
July 21, 2021	9:00 AM – 12:00 PM	Microsoft Teams
August 4, 2021	9:00 AM – 12:00 PM	Microsoft Teams
August 18, 2021	9:00 AM – 12:00 PM	Microsoft Teams
September 22, 2021	9:00 AM – 12:00 PM	Microsoft Teams

October 27, 2021	9:00 AM – 12:00 PM	Microsoft Teams
November 17, 2021	9:00 AM – 12:00 PM	Microsoft Teams
December 15, 2021	9:00 AM – 12:00 PM	Microsoft Teams

Note: Additional Meeting dates and times may be required.

