

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

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CalSAWS Inbound IVR

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# 1 OVERVIEW

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The CalSAWS Interactive Voice Response (IVR) system will use the Amazon Connect platform for customers to call in to the County Contact Center. Currently, a customer can call into the IVR and obtain general information. Unauthenticated customers or non-primary applicants are routed to an agent. Meanwhile customers that are successfully authenticated and are primary applicants, can perform the following actions: obtain benefit program information, select a form to request, check on the status for a submitted documentation, and change their IVR PIN.

## 1.1 Current Design

The existing C-IV functionality migrated to CalSAWS with (SCR CA-207026). The CalSAWS Amazon Connect Contact Center Solution communicates with the CalSAWS application Database for self-service information.

## 1.2 Requests

Create Los Angeles and CalWIN counties individual call flows in the Amazon Connect environment.

## 1.3 Overview of Recommendations

1. Inbound IVR to include a customized call flow for each county that includes prompts, menus, queues, program selection, and call transfers supported for supported languages listed below:
  - a. English
  - b. Spanish
  - c. Farsi
  - d. Vietnamese
  - e. Mandarin
  - f. Tagalog
  - g. Russian
  - h. Korean
  - i. Cambodian
  - j. Hmong
  - k. Arabic
  - l. Lao
  - m. Cantonese
  - n. Armenian
  - o. Portuguese
2. Inbound IVR to include customer authentication via phone number and SSN, phone number and DOB, and voice print authentication.
3. Inbound IVR to include a self-service program menu to give customers the ability to receive benefit amounts.
4. Inbound IVR self-service information for the CalWORKs and CalFresh programs.
5. Inbound IVR self-service information for the Medi-Cal program.
6. Inbound IVR self-service information for the Welfare-to-Work (WTW) programs.

7. Inbound IVR to allow the customer to select previously generated/sent forms to be re mailed.
8. Inbound IVR to give the customer a dynamic set of options based on which forms are relevant to their case.
9. Inbound IVR to give the customer the ability to request a new IVR PIN to be mailed to them.
10. Inbound IVR to allow the customer to enter their zip code and request office hours and address.
11. Route calls to workers based on language and program selected by the customer in the IVR

## **1.4 Assumptions**

1. Any re-mailing of documents will go to the same address as the original documents were mailed to.
2. Individual county call flows will be determined during individual county sessions

## **2 RECOMMENDATIONS**

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### **2.1 Inbound IVR Call Flow**

#### **2.1.1 Overview**

The inbound IVR call flow is customized for all contact center counties including Los Angeles and the CalWIN counties. All inbound IVR call flows contain self-service menu options and the ability to speak to a worker/agent. Self-service menus are limited to customers that complete the authentication process.

#### **2.1.2 Description of Changes**

The verbiage for different languages supported in the inbound IVR will be translated and recorded by professional voice talent. Supported Languages:

- English (default)
- Spanish
- Farsi
- Vietnamese
- Mandarin
- Tagalog
- Russian
- Korean
- Cambodian
- Hmong
- Arabic
- Lao
- Cantonese

- Armenian
- Portuguese

Create self-service options, menus and prompts for Los Angeles and the CalWIN counties.

Note: Individual call flows will be customized including queues and call transfer options during the individual county sessions.

For callers who are successfully authenticated in the IVR, the system plays the self-service options if the caller is a primary applicant. One of the self-service options included provides benefit information for CalWORKs, CalFresh, Medi-Cal and Welfare to Work (WTW) programs. This information is provided dynamically based on the customers active programs.

### **2.1.2.1 Self-Service Option for CalWORKs and CalFresh Programs**

For the CalWORKs Program and CalFresh Program, the IVR will play back the following:

- Program Status
- Total Amount issued for this month and next month.
- The system will notify the customer if benefits are on hold.
- IVR plays back both the current and upcoming benefits for CalWORKs and CalFresh programs.
- The Held status is only set when a worker manually updates an issuance and selects the 'Held' status.
- It means the customer hasn't received the benefit because the county is holding on to the warrant/check.

Callers can also check the document status of their CalWORKs status report, CalFresh Status Report, CalWORKs, and CalFresh Redetermination Packet.

### **2.1.2.2 Self-Service Option for the Medi-Cal Program**

For the Medi-Cal program, the IVR will play back the following:

- Program Type (Medi-Cal Service Benefit)
- Program Status
- Share of cost information for each eligible member aided

Callers can also check the document status of their Medi-Cal Redetermination Packet

### **2.1.2.3 Self-Service Option for Welfare-to-Work (WTW) Program**

For the Welfare to Work program, the IVR will play back the following:

- Program Status

- WTW reimbursement amount for each person participating in the program
- Sanction Status/Reason

#### **2.1.2.4 Self-Service Option for Forms**

The system gives the caller 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: Semi-annual report (SAR7), Transitional Medi-Cal Status report, or Verification of Benefits. The forms can be re-sent to the originally mailed address.

#### **2.1.2.5 Self-Service Option to Request New IVR PIN**

The system gives the customer the ability to change their IVR PIN. IVR PINs, such as 111111 or 123456, or non-numeric IVR PINs are not acceptable. Customers must input the same IVR PIN twice and they must match. Changes to the IVR PIN immediately take effect.

In the existing C-IV functionality, customers have a 4-digit IVR PIN that will be migrated to CalSAWS. When a new IVR PIN number is requested or generated, the system will mail a letter to the customer with a new 6-digit IVR PIN number.

#### **2.1.2.6 Self-Service Option to Request Office Information**

Callers will be prompted to enter their zip code into the IVR and the IVR will play back their County office hours and address.

### **2.2 Inbound IVR Authentication**

#### **2.2.1 Overview**

Customers use authentication methods in the inbound IVR to access self service features. SSN/DOB/Phone Number combinations are some of the more widely used authentication methods. Additional methods of authentication include the use of an IVR PIN and/or Voice Print Authentication.

1. Phone number and SSN or DOB and IVR PIN
2. Voice print authentication

#### **2.2.2 Description of Changes**

During voice print authentication, the system asks the caller to speak their passphrase, "my voice is my password, please verify me." The passphrase is streamed to a Voice Biometric Security server to compare the passphrase with previously enrolled voice prints. On a successful match, the caller will be routed to the self-service options. Voice Authenticate is included in SCR CA-226843.

New Cases generated in CalSAWS will contain letters as well as numbers. Customers will no longer be able to enter their case number if it contains letters, so the IVR will no longer prompt them to enter it.

The IVR will now prompt the customer to enter their phone number and their social security number. If the customer does not have or doesn't know their social security number they will be prompted for their date of birth, and/or their IVR PIN. A customer will only be prompted for their date of birth or IVR PIN if the IVR is unable to narrow down the customer to a single person in the CalSAWS database.

Note: Customers issued a 4-digit IVR PIN in C-IV will be able to authenticate using their existing PIN. All IVR PINs generated in CalSAWS will be 6 digits. When a customer resets their existing 4-digit PIN migrated from C-IV the new PIN will be 6 digits.

If a caller selects to login with their social security number (SSN) and Date of Birth (DOB), the system matches the SSN and DOB combination before routing to the self-service options. Unauthenticated callers will be routed to the program menu.

## **2.3 Route to An Agent**

### **2.3.1 Overview**

If the caller decides to speak to a worker, the call is routed to a worker based on the program and language selected in the IVR.

### **2.3.2 Description of Changes**

Calls are routed based on routing profiles and queues available in the county. Customers may be offered Courtesy Callback or Scheduled Callback based on the county administration of these features. Administration page features are included in SCR CA-226672

#### **2.3.2.1 Courtesy Callback**

The Courtesy Callback feature reduces the time callers must wait in queue. The feature allows the system to offer callers the option to be called back by the system when it is the caller's turn to speak to an available agent.

This option can be limited to callers who meet certain criteria. For example, callers with the possibility of being in queue for more than X minutes.



If the caller decides to be called back by the system, they will input their phone number. When the system determines that an agent is available, then a call is placed back to the caller.

### 2.3.2.2 Scheduled Callback

The “Scheduled Callback” feature is one where a customer will call the CalSAWS Call Center for a specific county and be placed into a queue. The system will then check if the call center is either closed or if it has reached the maximum limit of customers waiting in queue. In these cases, the customer will be offered callbacks for the next day at specified times. The Scheduled Callback functionality will be implemented with SCR CA-229573

## 3 SUPPORTING DOCUMENTS

[NOTE: do not attach/embed files into the design doc, list here by filename only. The files will be attached to the Jira ticket alongside this design doc]

| Number | Functional Area                    | Description  | Attachment |
|--------|------------------------------------|--|------------|
| 1      | AWS Inbound IVR Detailed Call Flow | Visio diagram represents inbound call flow, AWS inbound IVR Detailed Call Flow.pdf |            |

## 4 REQUIREMENTS

### 4.1 Project Requirements

| REQ # | REQUIREMENT TEXT   | How Requirement Met |
|-------|--|---------------------|
| 2705  | <p>The CONTRACTOR shall configure the CalSAWS inbound IVR to have a customized call flow for each county including the following:</p> <ul style="list-style-type: none"> <li>- prompts</li> <li>- menus</li> <li>- queues</li> <li>- program selection</li> <li>- call transfers</li> </ul> <p>All flows include all self-service features.<br/>The following languages will be supported in the CalSAWS inbound IVR:</p> <ul style="list-style-type: none"> <li>- English</li> <li>- Spanish</li> </ul> | Section 2.1.2       |

|      |  |                 |
|------|--|-----------------|
|      | <ul style="list-style-type: none"> <li>- Farsi</li> <li>- Vietnamese</li> <li>- Mandarin</li> <li>- Armenian</li> <li>- Tagalog</li> <li>- Russian</li> <li>- Korean</li> <li>- Cambodian</li> <li>- Hmong</li> <li>- Cantonese</li> <li>- Arabic</li> <li>- Lao</li> </ul>  |                 |
| 2706 | <p>The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to authenticate themselves in the IVR using one of the following options:</p> <ul style="list-style-type: none"> <li>- Social Security Number and date of birth</li> <li>- case number and PIN</li> <li>- voice print authentication</li> </ul>  | Section 2.2     |
| 2707 | <p>The CONTRACTOR shall configure the CalSAWS Inbound IVR to include a self-service program menu to give customers the ability to receive benefit amounts for the following programs:</p> <ul style="list-style-type: none"> <li>- CalWORKs</li> <li>- CalFresh</li> <li>- Welfare to Work</li> </ul> <p>The CONTRACTOR shall configure the self-service program menu to give customers the ability to receive active or inactive status for Medi-Cal.</p>                   | Section 2.1.2   |
| 2708 | <p>The CONTRACTOR shall configure the CalSAWS Inbound IVR self-service information for the CalWORKs and CalFresh programs as stated below:</p> <ul style="list-style-type: none"> <li>- Program Status</li> <li>- Total Amount received for this month</li> <li>- If benefits are on hold, the system will notify the customer</li> <li>- If benefits are not on hold, the customer will be notified for what they are eligible to receive in the upcoming month.</li> </ul> | Section 2.1.2.1 |
| 2709 | <p>The CONTRACTOR shall configure the CalSAWS Inbound IVR self-service information for the Medi-Cal program as stated below:</p>   | Section 2.1.2.2 |

|      |   |                             |
|------|---|-----------------------------|
|      | <ul style="list-style-type: none"> <li>- Medi-Cal Program Type</li> <li>- Status</li> <li>- Share of Cost</li> <li>- Medi-Cal Service Benefit</li> </ul>  |                             |
| 2710 | <p>The CONTRACTOR shall configure the CalSAWS Inbound IVR self-service information for the Welfare-to-Work (WTW) programs as stated below:</p> <ul style="list-style-type: none"> <li>- Upcoming Activities</li> <li>- WTW Reimbursement Amount</li> <li>- Sanction Status/Reason</li> </ul>  | Section 2.1.2.3             |
| 2711 | <p>The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to select previously generated/sent forms to be mailed. The form list will be dynamically provided to the customer based on forms relevant to their case. The following forms can be re-sent:</p> <ul style="list-style-type: none"> <li>-Semi-annual report</li> <li>-Transitional Medi-Cal Status report</li> <li>-Passport to services form</li> </ul>   | Section 2.1.2.4             |
| 2712 | <p>The CONTRACTOR shall configure the CalSAWS Inbound IVR to give the customer a dynamic set of options based on which forms are relevant to their case. They may select a form to get the status of the form based on the options available in this dynamic menu:</p> <ul style="list-style-type: none"> <li>- CalWORKs status report</li> <li>- CalWORKs or CalFresh Redetermination packet</li> <li>- CalFresh status report</li> <li>- CalFresh Redetermination packet</li> <li>- Transitional Medi-Cal status report</li> <li>- Medi-Cal Redetermination packet</li> </ul> | Section 2.1.2.1 and 2.1.2.2 |
| 2713 | <p>The CONTRACTOR shall configure the CalSAWS Inbound IVR to give the customer the ability to change their IVR PIN. Changing the IVR PIN is real-time.</p>  | Section 2.1.2.5             |

|      |  |                 |
|------|--|-----------------|
| 2714 | The CONTRACTOR shall configure the CalSAWS Inbound IVR to give the customer the ability to request a new IVR PIN to be mailed to them.     | Section 2.1.2.5 |
| 2715 | The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to enter their zip code and request office hours and address. | Section 2.1.2.6 |