

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-229573: DDID 2284 | Scheduled Callback

|                |                                  |                            |
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# 1 OVERVIEW

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This design is for the new Scheduled Callback functionality. This functionality allows customers to request a callback while the county contact center is closed, or if the queue requested has reached its max queue depth.

## 1.1 Current Design

This functionality does not currently exist. When a customer calls into the IVR after hours, or the queues have reached their max queue depth, they do not have an opportunity to request a call back.

## 1.2 Requests

Develop functionality that allows the caller to request a Scheduled Call Back when calling outside of the counties' configured hours of operation, or if the max queue depth has been reached.

## 1.3 Overview of Recommendations

1. Add the Scheduled Call Back functionality into the existing Inbound IVRs.

## 1.4 Assumptions

1. A scheduled callback can only be scheduled for the next business day.
2. Callers will not be offered a call back if all scheduled call back slots are full. Callers will receive the appropriate message prior to being disconnected from the IVR.
3. The scheduled call back functionality will be configured through the Administration Page. See SCR CA-226672 for more details.
4. Auto-Answer is not supported for Scheduled Call Back. Agents must click accept before the Outbound call is placed.
5. The ability for a customer to cancel a Scheduled Call back is not in scope for this change.

# 2 RECOMMENDATIONS

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This section outlines recommendations to add a new Scheduled Call back feature in the Inbound IVR applications.

## 2.1 Scheduled Callbacks

### 2.1.1 Overview

Add a new scheduled call back feature that allows customers to request a call back if they called while the county contact center is closed, or if the queue they requested has reached max queue depth.

### 2.1.2 Description of Changes

1. Add an option in the existing county call flows to offer a scheduled call back for the next business day if the call center is closed, or if the queue is at max queue depth.
  - a. A scheduled callback will only be offered if there are still slots available. If all slots are currently filled, the scheduled call back feature will not be offered.
    - i. The IVR will play the county specific closed message, or maximum queue depth message that is currently in place.
  - b. The Scheduled Callback feature can be disabled/enabled and configured by county staff that have access to the Administration Page. Please see SCR CA-226672 for more information.
    - i. If Schedule Callback is disabled for the county, the IVR will play the county specific closed message, or maximum queue depth message that is currently in place.

| Contact Center Admin          |  |
|-------------------------------|--|
| Emergency Open / Close        | <h3>Scheduled Callback</h3> <p>The Scheduled Callback feature is currently not enabled. Scheduled Callbacks allow the caller to schedule a call from the Contact Center at a specific time the following day. To enable, select the 'Enabled' option below and press 'Save' :</p> <p><input checked="" type="radio"/> Disabled<br/><input type="radio"/> Enabled</p> <p><a href="#">Save</a></p> |
| Emergency Message             |  |
| Courtesy Callback             |  |
| Scheduled Callback            |  |
| Queue Limits                  |  |
| After Call Work               |  |
| Supervisor email notification |  |
| Queue Hold Messages           |  |
| Informational Message         |  |
| Roll on/off / Update Agent    |  |
| Create/Delete Team            |  |
| Quick Connects                |  |
| Hours of Operation            |  |
|                               |  |
|                               |  |
|                               |  |

Figure 1 Scheduled Callback - feature disabled

### 2.1.2.1 Scheduling the Callback

1. When the scheduled call back is offered, customers will be given the option to opt in. If they do not opt in for the call back, the call will be ended.
  - a. The scheduled call back feature is available to all threshold languages supported. For more information, please see SCR CA-226837 Inbound IVR.
  - b. If the IVR is closed, the customer will hear the county specific message letting the customer know that the contact center is currently closed and to call back during regular business hours.
  - c. If the queue that the customer selected is currently at maximum queue depth, the customer will hear the county specific maximum queue depth message letting them know to call back at a later time.
  - d. Both messages that are played here are customized by each individual county.
  
2. The prompt that is played depends on the reason for offering the scheduled call back.
  - a. If the IVR is closed, the customer will hear the message:  
*"I'm sorry, but the contact center is currently closed. If you would like us to call you back on the next business day, please press 1."*
  
  - b. If the queue selected is currently at max queue depth, the customer will hear the message:  
*"I'm sorry, we have reached our maximum number of callers currently in queue. If you would like us to call you back on the next business day, please press 1."*
  
3. If the customer presses option 1, they will be prompted to select from one of the available time slots that are still available.
  - a. The time slots, and how many callers can opt in for that time slot, is configured in the Administration page. See SCR CA-226672 for more information.
  - b. The scheduled call back does not limit how many times a single phone number can request a call back. This is due to the possibility of shared phone lines.

## Contact Center Admin

- Emergency Open / Close
- Emergency Message
- Courtesy Callback
- Scheduled Callback
- Queue Limits
- After Call Work
- Supervisor email notification
- Queue Hold Messages
- Informational Message
- Roll on/off / Update Agent
- Create/Delete Team
- Quick Connects
- Hours of Operation

### Scheduled Callback

The Scheduled Callback feature is currently enabled. Scheduled Callbacks allow the caller to schedule a call from the Contact Center at a specific time the following day. To disable, select the 'Disabled' option below and press 'Save' :

Configuration
Callbacks: today
Callbacks: next business day

Disabled
  Enabled

#### Configure Callback Time Slots

Configure the maximum number of available callbacks in each callback window. If no callbacks are available in that window, enter 0.

|                     | Number of callbacks                                 | Number of callbacks | Number of callbacks                                 |
|---------------------|---|---------------------|---|
| 8:00 AM - 9:00 AM   | <input style="width: 40px;" type="text" value="1"/> | 12:00 PM - 1:00 PM  | <input style="width: 40px;" type="text" value="3"/> |
| 9:00 AM - 10:00 AM  | <input style="width: 40px;" type="text" value="1"/> | 1:00 PM - 2:00 PM   | <input style="width: 40px;" type="text" value="3"/> |
| 10:00 AM - 11:00 AM | <input style="width: 40px;" type="text" value="3"/> | 2:00 PM - 3:00 PM   | <input style="width: 40px;" type="text" value="3"/> |
| 11:00 AM - 12:00 PM | <input style="width: 40px;" type="text" value="0"/> | 3:00 PM - 4:00 PM   | <input style="width: 40px;" type="text" value="2"/> |
|                     |   | 4:00 PM - 5:00 PM   | <input style="width: 40px;" type="text" value="1"/> |
|                     |   | 5:00 PM - 6:00 PM   | <input style="width: 40px;" type="text" value="1"/> |

Save
Add New Time Range
Delete Time Range
Save
Cancel

Figure 2 Scheduled Callback – configured time slots

4. After selecting a time slot from the available options, the customer will be prompted to confirm their phone number.
  - a. The IVR will play the message, *“If you would like us to call you back at (Customer's Phone Number), please press 1. To use a different call back number press 2.”*
5. If the customer presses 1, the call back will be scheduled for the customer using their caller ID and stored in the scheduled call back database.
6. If the customer presses 2, they will be prompted to enter their ten-digit phone number. The IVR will then check if the phone number entered is not ten digits or begins with 1. If it is not valid, the customer will have 2 more attempts to enter a valid phone number before the IVR ends the call.
7. Once the call back request is scheduled the IVR will play the message *“Your call back request is scheduled for the next business day between (time range selected). Goodbye”*.

### 2.1.2.2 Calling the Customer Back

1. Every hour during the business day, the scheduled call back system will check if there are any calls that fall within the current time range stored in the database. For example, if it is 10:00 AM and there are three calls in the database scheduled to be called back between 10:00 AM and 11:00 AM, it will place those three calls in the Scheduled Call Back queue that align with the customer's language.
2. The scheduled call back queue will act like any other queue and will need to be associated to contact center agents routing profile(s). When there's an agent available and a scheduled callback call is next in the queue, the system will place an outbound call from the agent's call control panel.
3. If the call is answered, by the customer or voicemail, the callback will be marked as complete and is removed from the queue.
  - a. When the call is answered the customer will hear the message *"This is a call from <County Name> county. This call is recorded for training and quality purposes."*
  - b. This message will be played in the language that the customer originally selected.
4. If the call is not answered, the agent will be placed back in ready status and the system will wait 10 minutes before attempting to call the user back again. It will make a total of 3 attempts to contact the customer.

### 2.1.3 Reporting

#### 2.1.3.1 Overview

Add a new scheduled call back reporting feature to the Administration page. Users with access to the administration page will be able to see how many calls are currently scheduled. Also, every scheduled callback attempt will be journaled in CalSAWS.

#### 2.1.3.2 Description of Change

1. Reporting for calls handled and how many are currently in queue will be done through the eGain reporting tool. For more information on reporting capabilities of eGain, please see SCR CA-226209 eGain Analytics and Calabrio One.
2. Add tabs in the Administration page to display how many calls are currently scheduled in each configured time slot, today and the next business day.



## Contact Center Admin

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- Create/Delete Team
- Quick Connects
- Hours of Operation

### Scheduled Callback

The Scheduled Callback feature is currently enabled. Scheduled Callbacks allow the caller to schedule a call from the Contact Center at a specific time the following day. To disable, select the 'Disabled' option below and press 'Save' :

Configuration
Callbacks: today
Callbacks: next business day

#### Scheduled Callbacks for Today

Currently scheduled callbacks for today:

|                     | Number of callbacks |                    | Number of callbacks |                   | Number of callbacks |
|---------------------|---------------------|--------------------|---------------------|-------------------|---------------------|
| 8:00 AM - 9:00 AM   | 0                   | 12:00 PM - 1:00 PM | 3                   | 4:00 PM - 5:00 PM | 1                   |
| 9:00 AM - 10:00 AM  | 1                   | 1:00 PM - 2:00 PM  | 3                   | 5:00 PM - 6:00 PM | 1                   |
| 10:00 AM - 11:00 AM | 2                   | 2:00 PM - 3:00 PM  | 2                   |                   |                     |
| 11:00 AM - 12:00 PM | 3                   | 3:00 PM - 4:00 PM  | 2                   |                   |                     |

OK

Figure 3 Scheduled Callback – reporting for today

## Contact Center Admin

- Emergency Open / Close
- Emergency Message
- Courtesy Callback
- Scheduled Callback
- Queue Limits
- After Call Work
- Supervisor email notification
- Queue Hold Messages
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- Roll on/off / Update Agent
- Create/Delete Team
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- Hours of Operation

### Scheduled Callback

The Scheduled Callback feature is currently enabled. Scheduled Callbacks allow the caller to schedule a call from the Contact Center at a specific time the following day. To disable, select the 'Disabled' option below and press 'Save' :

Configuration
Callbacks: today
Callbacks: next business day

#### Scheduled Callbacks for Next Business Day

Currently scheduled callbacks for next business day:

|                     | Number of callbacks |                    | Number of callbacks |                   | Number of callbacks |
|---------------------|---------------------|--------------------|---------------------|-------------------|---------------------|
| 8:00 AM - 9:00 AM   | 0                   | 12:00 PM - 1:00 PM | 3                   | 4:00 PM - 5:00 PM | 1                   |
| 9:00 AM - 10:00 AM  | 1                   | 1:00 PM - 2:00 PM  | 3                   | 5:00 PM - 6:00 PM | 1                   |
| 10:00 AM - 11:00 AM | 2                   | 2:00 PM - 3:00 PM  | 2                   |                   |                     |
| 11:00 AM - 12:00 PM | 3                   | 3:00 PM - 4:00 PM  | 2                   |                   |                     |

OK

Figure 4 Scheduled Callback – reporting for next business day

3. At the end of each business day, run a reporting job to create a CSV file with the results of each scheduled call back call that day.
  - a. Save results as a CSV file
  - b. Upload the results of the CSV file to CalSAWS and create a journal entry for each attempted call back, and the result of the call.
  - c. This reporting is only available for Authenticated Callers, as a Case number is necessary to journal the call back attempts.

### 3 REQUIREMENTS

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#### 3.1 Project Requirements

| REQ # | REQUIREMENT TEXT   | How Requirement Met  |
|-------|--|--|
| 2284  | The CONTRACTOR shall configure the Customer Service Center solution to allow a customer to request a scheduled callback if calling outside of the counties configured hours of operation or if the max queue limit has been reached in the queue. This is County configurable through the administration page. | Section 2.1:<br>Scheduled Callbacks<br><br>SCR CA-226627<br>Section 2.6:<br>Scheduled Callback configuration through Administration page |