

# CalSAWS

California Statewide Automated Welfare System

CA-226207: DDID 2219, 2268, 2716, 2717, 2718,  
2728, 2258: CalSAWS Outbound IVR

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
	Prepared By	Dheeraj Muralidara
	Reviewed By	

<b>DATE</b>	<b>DOCUMENT VERSION</b>	<b>REVISION DESCRIPTION</b>	<b>AUTHOR</b>
03/17/2021	V0.1	Draft	Dheeraj Muralidara

## Table of Contents

1	Overview .....	4
1.1	Current Design.....	4
1.2	Requests.....	4
1.3	Overview of Recommendations.....	4
1.4	Assumptions .....	5
2	Recommendations.....	5
2.1	Update Outbound IVR to enable for all 58 Counties .....	6
2.2	Update Language Supported in Outbound IVR .....	6
2.2.1	Overview .....	6
2.2.2	Additional Languages.....	6
2.3	Outbound IVR - Appointment Reminders .....	7
2.3.1	Overview .....	7
2.3.2	Task for Cancel Appointment.....	8
2.3.3	Transfer Reschedule Appointment Calls.....	8
2.4	Outbound IVR - Missing Document Reminders.....	10
2.4.1	Overview .....	10
2.4.2	Mail forms electronically .....	11
2.5	Outbound Call Status and Reporting.....	11
3	Supporting Documents .....	12
4	Requirements.....	12
4.1	Project Requirements.....	13
4.2	Migration Requirements.....	14
5	Migration Impacts .....	14

# 1 OVERVIEW

---

The CalSAWS Interactive Voice Response (IVR) system will use the Amazon Connect platform to contact customers via phone calls for automated outbound IVR calls. These automated outbound IVR calls provide information for appointment reminders and document reminders. Based on the information in the system, automatic calls are sent to customers that have opted to receive these calls. Customers can contact their county to opt-in to this service. Workers initiate the opt-in process from the Contact Detail page in the CalSAWS Application. Outbound IVR calls include appointment reminders, missing 'SAR7' documents and 'Balderas' reminders.

## 1.1 Current Design

The CalSAWS Outbound IVR Appointment Reminder and Outbound IVR Missing Document Reminder are C-IV functionalities migrated with SCR CA-207026. Data from CalSAWS is transferred to the Contact Center system via a text file and stored in an AWS S3 bucket. The batch jobs associated to this data transfer for the 'Missing Balderas Reminder Outbound campaigns' (POxxM304), and 'Missing SAR7 Reminder Outbound campaigns' (POxxM302) were migrated by SCR CA-218722.

## 1.2 Requests

Update migrated C-IV Outbound IVR Campaigns (SCR CA-226207) to include additional changes to support all 58 counties according to the requirements gathered during the Contact Center Functional Design Sessions.

## 1.3 Overview of Recommendations

Update the existing Outbound IVR batch job process to support 58 counties and include the following:

- 1) Enhance the Amazon Outbound API calls to support additional call volume.
- 2) Configure the Outbound IVR to support additional languages:
  - a. Farsi
  - b. Vietnamese
  - c. Mandarin
  - d. Tagalog
  - e. Russian
  - f. Korean
  - g. Cambodian
  - h. Hmong
  - i. Arabic
  - j. Lao
  - k. Cantonese
  - l. Armenian
  - m. Portuguese
- 3) Enable the Contact Detail page to allow all counties to opt-in and/or opt-out customers for Outbound IVR Campaigns.

- 4) Configure the Outbound IVR Caller ID to display the CalSAWS IVR phone number associated to the county in which the customer's program is associated.
- 5) Configure the Appointment Reminder Outbound IVR calls to:
  - a. Include appointment reminders for the following appointment types:
    - i. Meeting with worker
    - ii. Group meeting
    - iii. Telephone interview
    - iv. Re-evaluation interview
    - v. Telephone CW/CF Re-Evaluation interview
  - b. Provide the customer an option to confirm, cancel or reschedule the appointment.
  - c. Create a task when a customer cancels their appointment during a CalSAWS outbound IVR call.
  - d. Transfer the caller to a queue or to a designated county number when a customer selects to reschedule their appointment.
- 6) Configure the Missing SAR 7 and Balderas Reminder Outbound IVR calls to provide the customer the option to have the missing document be re-sent:
  - a. Resend generated document to address originally mailed.
  - b. Create ability to electronically send if the customer has opted into e-notification for BenefitsCal.

## 1.4 Assumptions

1. The existing C-IV Outbound IVR Campaigns will be implemented into CalSAWS with SCR CA-226207. The recommendations in this SCR will enhance the migrated functionality and enable it for the 58 counties.
2. Outbound Call scheduling will match the existing Campaign schedules i.e. Tuesday – Saturday, 8AM-6PM.
3. Caller ID IVR Phone numbers will be assigned to CalWIN and Los Angeles Counties during a later phase. C-IV Counties will maintain their existing IVR phone numbers.
4. Ability to turn on or turn off task generation for appointments canceled through outbound IVR is configured by counties through the automated actions pages.
5. Task generation for appointments canceled through the outbound IVR will default to “off” for all counties. Counties will need to turn on task generation through automated actions if task generation is needed.
6. AWS will support the custom caller ID model for Outbound IVR Caller ID.

## 2 RECOMMENDATIONS

---

This section outlines recommendations to update the existing batch jobs to enable Outbound IVR for all 58 counties and additional updates to meet the requirements:

## 2.1 Update Outbound IVR to enable for all 58 Counties

The existing C-IV batch jobs migrated to CalSAWS with SCR CA-218722 and Amazon Outbound APIs will be configured for the additional 19 counties (Los Angeles County and 18 CalWIN Counties).

- Update 'Missing Balderas Reminder Outbound campaigns' (POxxM304)
- Update 'Missing SAR7 Reminder Outbound campaigns' (POxxM302)

Enhance Amazon Outbound APIs to be optimized for additional outbound call volume associated to all 58 counties.

The Contact Detail page in the CalSAWS application to allow workers to initiate the Outbound IVR Call opt-in/opt-out process for all counties. Note: This functionality is already in CalSAWS and will be available to all 58 counties.

Case Name: Case Name  
Case Number: Journal Tasks Help Resources Page Mapping Images DCF5 Images Log Out

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

### Contact Detail

\*- Indicates required fields

Save Save and Return Cancel

Name: \* IVR PIN: Voice Print: No  
Reset PIN

E-mail Address: Allow E-Mail Reminder E-Notification: [v]  
Customer ID:

E-mail Status:

#### Phone Numbers

Number	Type *	IVR Consent	Allow Text
<input type="checkbox"/> (507)946-2663 ext. <input type="text"/>	Home [v]	Opt-In [v]	<input type="checkbox"/>
<input type="checkbox"/> <input type="text"/> ext. <input type="text"/>	[v]	[v]	<input type="checkbox"/>

Remove Add

Remove All Save Save and Return Cancel

## 2.2 Update Language Supported in Outbound IVR

### 2.2.1 Overview

CalSAWS Outbound IVR calls are currently supported in 2 languages: English and Spanish.

### 2.2.2 Additional Languages

Update all Outbound IVR calls to support the following additional languages:

- a. Farsi

- b. Vietnamese
- c. Mandarin
- d. Tagalog
- e. Russian
- f. Korean
- g. Cambodian
- h. Hmong
- i. Arabic
- j. Lao
- k. Cantonese
- l. Armenian
- m. Portuguese

The batch job (SCR-226207) will be updated to include the above listed languages. The verbiage for different languages will be recorded by professional voice talent. The verbiage translation will be done by a separate third-party vendor and confirmed prior to professional voice recording. The language in which the customer receives the outbound IVR call will be determined by the language code from the batch job County Caller ID

Outbound IVR will be set up to display the phone number for that county's CalSAWS IVR on the caller ID of the outbound call to facilitate customers calling back.

Note: All 39 C-IV Counties will display the existing IVR phone number as the caller ID number for outbound IVR calls.

Los Angeles County and CalWIN County caller ID numbers will be determined at a later time.

## **2.3 Outbound IVR - Appointment Reminders**

### **2.3.1 Overview**

The Outbound IVR – Appointment Reminders will be enabled for all 58 counties.

For Appointment Reminders, currently the batch job finds a customer's appointment date between the appointment high and appointment low dates.

- Appointment low date is defined as the next business day + 1 day from the batch date.
- Appointment high date is defined as 3 business days + 1 day from the batch date.

Appointment types include Meeting with Worker, Group Meeting, Telephone Interview, Re-Evaluation Interview and Telephone CW/CF Re-Evaluation Interview.

Appointments must be in a status of "scheduled" or "rescheduled".

Based on the appointment ID the batch job had returned, the caller is played back the appointment information including the appointment type, date and the duration. The customer has an option to confirm or cancel.

- If the customer confirms the appointment, the outbound IVR updates the system and the call is released with the corresponding outbound call status.
  - Appointment page is updated with a status of 'Confirmed'.
- If the customer decides to cancel the appointment, the customer will be prompted to authenticate by entering case number and IVR PIN.
  - Appointment page is updated with "Cancelled" status
  - Journal entry is created
  - Email is sent to worker

All outbound IVR calls are documented in the Customer Contact History page.

Note: This is existing C-IV outbound IVR functionality migrated to CalSAWS in SCR CA-226207.

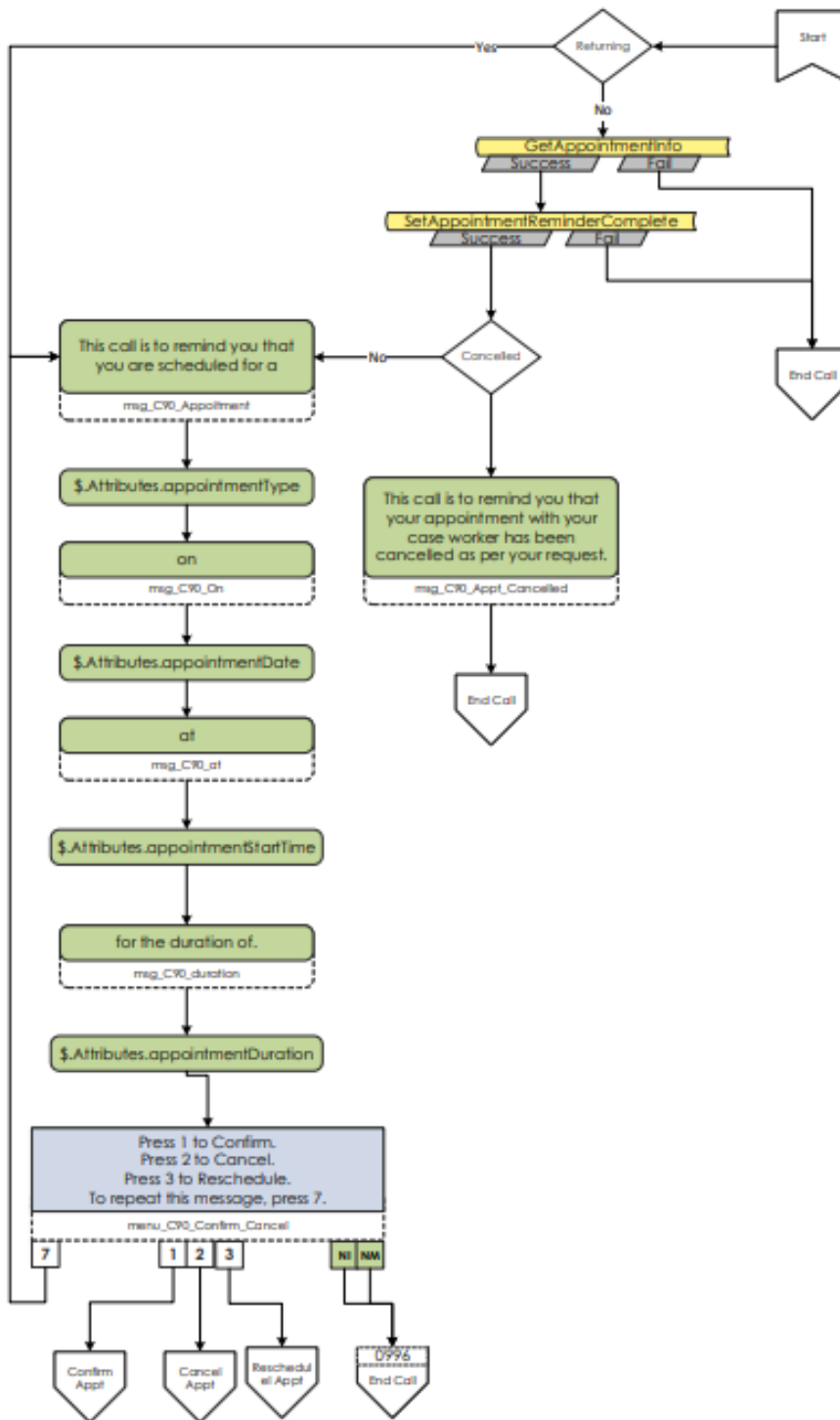
### **2.3.2 Task for Cancel Appointment**

Update CalSAWS System to create a task when a customer cancels their appointment during a CalSAWS outbound IVR call. This functionality will be included in a separate design effort.

### **2.3.3 Transfer Reschedule Appointment Calls**

Add option to reschedule the appointment during an Outbound IVR appointment reminder call.



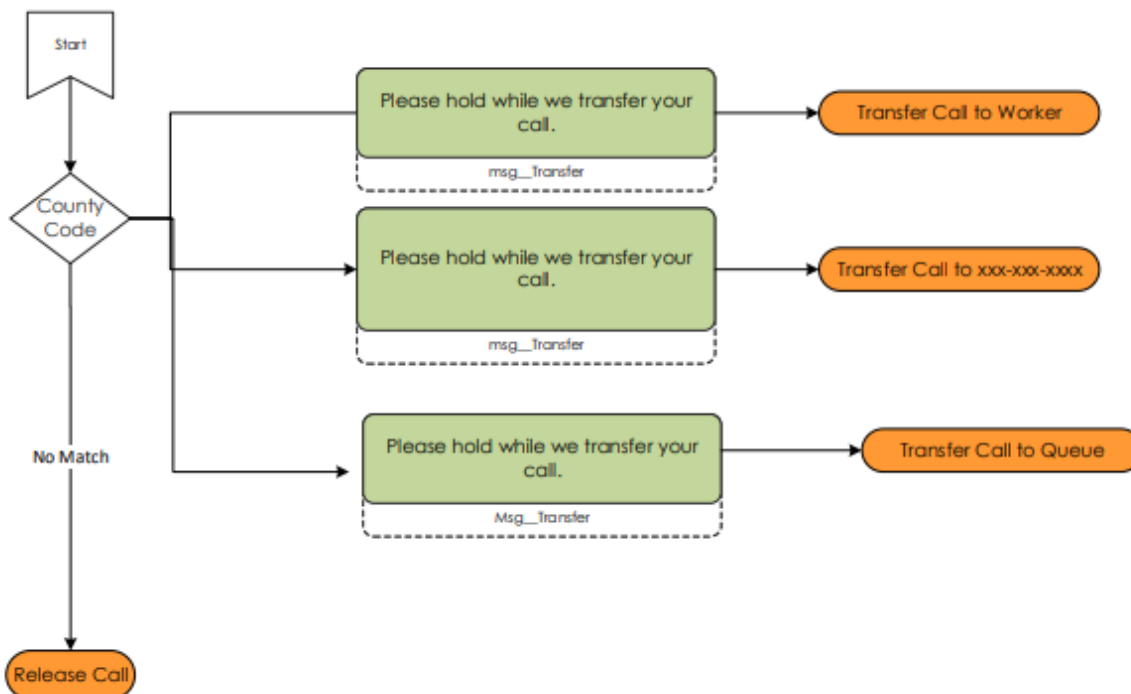


If a customer selects to reschedule an appointment, the call will be transferred in the following manner:

- In a CalSAWS Contact Center County – Call is transferred to contact center queue for agent to complete rescheduling appointment or call is transferred to external phone number. Note: Individual county

configuration for rescheduling transfer will be determined during individual county call flow design sessions prior to county go-live.

- In a Non-CalSAWS Contact Center County – Call is transferred to external number configured for all worker transfers.



## 2.4 Outbound IVR - Missing Document Reminders

### 2.4.1 Overview

The Outbound IVR – Missing Document Reminders will be enabled for all 58 counties.

For Missing Document Reminders, the batch job finds a SAR 7 document that has a 'doc\_date' that is in between the batch date and the batch date + 1 day. There are two (2) missing document reminders.

- SAR 7 Reminder – This is triggered by the generation of the NA 960X SAR
- Balderas Reminder – this is triggered by M40 181C SAR

Both missing document reminders provide the customer the document name, document due date and provide the customer the options request the form be re-sent.

If the caller selects the option to request the form, the system will determine the form type on file that will be offered and will resend the system generated form.

**Note:** the system will not generate a new form. The request form is sent to address associated when original form was generated.

All outbound IVR calls are documented in the Customer Contact History page.

**Note:** This is existing C-IV outbound IVR functionality migrated to CalSAWS in SCR CA-226207.

### 2.4.2 Mail forms electronically

Create ability to electronically send if the customer has opted into e-notification for BenefitsCal. This functionality will be included in a separate design effort.

## 2.5 Outbound Call Status and Reporting

A nightly batch job receives a CSV file from Amazon, processes the file and journals the records. The CSV file contains information pertaining to the status of outbound calls.

### Outbound Call Status Definitions

Call Status Result Code	Call Status Short Description	Call Status Long Description
8	Customer phone did not answer	Customer phone did not answer
10	Customer answered and was connected	Customer answered and was connected
24	Number successfully contacted but reached the wrong person	Number successfully contacted but reached the wrong person
29	Not able to Connect to Customer phone.	Not able to connect to customer phone.
30	Customer connected and confirmed appointment.	Customer connected and confirmed appointment.
31	Customer connected and attempted to confirm appointment.	Customer connected and attempted to confirm appointment due to error.
32	Customer connected and canceled appointment.	Customer connected and canceled appointment.
33	Customer connected and attempted to cancel appointment.	Customer connected and attempted to cancel appointment but failed to authenticate.

34	Customer connected and successfully requested document.	Customer connected and successfully requested document be resent to their address on file.
35	Customer connected and requested document to be re-sent, but failed.	Customer connected and requested document to be re-sent but failed due to an error.

The CalSAWS system generates an inbound/outbound call report which provides information regarding call type and whether or not the call was answered by the customer. Users must subscribe within CalSAWS to receive this report. Users subscribed to access this report on the CalSAWS application can generate this report at any time. Reports are generated per request. Any user within the IVR Report security group can access this report.

### 3 SUPPORTING DOCUMENTS

---

Number	Functional Area	Description	Attachment
1	AWS Outbound Campaigns Detailed Call Flow	Visio diagram represents outbound call flow, AWS Outbound Campaigns Detailed Call Flow.pdf	
2			
3			
4			

### 4 REQUIREMENTS

---

## 4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2219	The CONTRACTOR shall configure the Customer Service Center solution to allow counties to update the customers opt in and/or opt out status for the outbound IVR Campaigns through the CalSAWS Application.	Section 2.1
2268	The CONTRACTOR shall configure the CalSAWS outbound IVR to display the phone number for that county's CalSAWS IVR on the caller ID of the outbound call to facilitate customers calling back.	Section 2.2.2
2716	The CONTRACTOR shall configure the CalSAWS Outbound IVR solution to include document reminders for missing SAR7's in the outbound IVR Campaigns. Upon answering the call, the customer can request to have their SAR7 resent to them.	Section 2.4
2717	The CONTRACTOR shall configure the CalSAWS Outbound IVR solution to have appointment reminders that include meeting with worker, group meeting, telephone interview, re-evaluation interview, telephone CW/CF Re-Evaluation Interview. The customer must have an appointment status that is "scheduled" or "rescheduled." Upon receiving the appointment reminder, the customer can confirm or cancel the appointment.	Section 2.3
2718	The CONTRACTOR shall configure the CalSAWS System to create a task when a customer cancels their appointment during a CalSAWS outbound IVR call.	Section 2.3.2
2728	The following languages will be supported in the CalSAWS Outbound IVR: <ul style="list-style-type: none"> <li>- English</li> <li>- Spanish</li> <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>	Section 2.2.2

2258	<p>The CONTRACTOR shall configure the CalSAWS Application to include an Inbound/Outbound Call Report which provides the following information:</p> <ul style="list-style-type: none"> <li>- Date</li> <li>- Case Number</li> <li>- Case Name</li> <li>- Person Name</li> <li>- Language</li> <li>- Worker</li> <li>- Answered/ Unsuccessful</li> <li>- Type</li> </ul>	Section 2.5
------	--	-------------

## 4.2 Migration Requirements

Not Applicable.

## 5 MIGRATION IMPACTS

---

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?
NA					