

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-226839: DDID 2216, 2725

External Party Access (EPA) IVR

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1 OVERVIEW

The Interactive Voice Response (IVR) system allows customers to self-serve and connect to the county. An additional IVR is necessary for resources and external parties, such as Community Based Organization (CBOs). The IVR PIN is used to authenticate in an IVR system.

1.1 Current Design

In CalSAWS, only the Case Person has access to the Interactive Voice Response (IVR), and they can call in using their voice as a password or the Personal Identification Number (PIN). Therefore, the IVR PIN is only being displayed on the Contact Detail page with the case person's information.

This functionality does not currently exist in the IVR. External parties currently do not have a separate phone number to call to be connected to the correct county IVR.

1.2 Requests

Add 'IVR PIN' field and a 'Reset PIN' button next to it in the Resource Detail page, Foster Care Resource Detail page, and the Money Management Resource Detail page.

Add the new PIN Letter for External Party Access (EPA).

Create a call flow in the Amazon Connect platform for the Customer Service Center solution to allow authorized external parties (CBO's, other Providers, County Agencies) to call a specific phone number, authenticate with a PIN, and be transferred to the caller's destination County agent.

1.3 Overview of Recommendations

1. Modify the Resource Detail page, Foster Care Resource Detail page and the Money Management Resource Detail page to add the 'IVR PIN' field and a 'Reset PIN' button next to it.
2. Add the new CSF 181 – Resource IVR PIN Letter to CalSAWS.
 - a. A new form/ NOA header will be implemented to be used for the CSF 181.
3. Configure External Party Access call flow in the AWS connect platform.

1.4 Assumptions

1. Fields not modified within the description of changes will retain their current functionality.
2. The CSF 181 will not be implemented into the Template Repository.
3. CBO's that do not enter their PIN will show as "Unauthenticated" in the Amazon Contact Control Panel (CCP) Screen pop.
4. All counties will have one common phone number for External parties to call into the IVR.

5. Each Contact Center County will have a new EPA specific queue.
6. Direct transfer to county if non contact center county. Phone number to be provided by county.
7. EPA will only support the English language.
8. EPA calls will be prioritized over regular IVR calls to the county, prioritization will be added at the contact flow level. The default priority for inbound calls to the IVR is 5. EPA calls will be set to priority 4, and they will be transferred to an agent above all priority 5 calls.
9. LA and CalWIN counties will be asked to provide a static phone number for the EPA IVR to transfer calls to. This will be updated as each county goes live on the Amazon Connect platform.

2 RECOMMENDATIONS

2.1 Resource Detail Page

2.1.1 Overview

Modify the Resource Detail page to add 'IVR PIN' field to display a 'Create PIN'/'Reset PIN' button next to it.

2.1.2 Resource Detail Page – Mockups

The screenshot shows the CalSAWS interface for the 'Resource Detail' page. The page title is 'Resource Detail' with a note '* - Indicates required fields'. There are 'Save' and 'Cancel' buttons at the top right. The 'Basic Information' section contains the following fields:

- ID:** 940000011
- Status:** * Active (dropdown menu)
- IVR PIN:** Create PIN (button)
- Name:** * CENTER FOR COMMUNITY AND FAMILY SERVICES
- Payee Name:** * CENTER FOR COMMUNITY AND FAMILY SERVICES
- eCAPS Vendor Number:** (empty text input field)

The 'Resource Access' section below shows a table with columns 'Active Directory Id' and 'Name', and a message 'No data found'. There is an 'Add' button at the bottom right of this section.

Figure 2.1.2-1 – Resource Detail Page-Create PIN

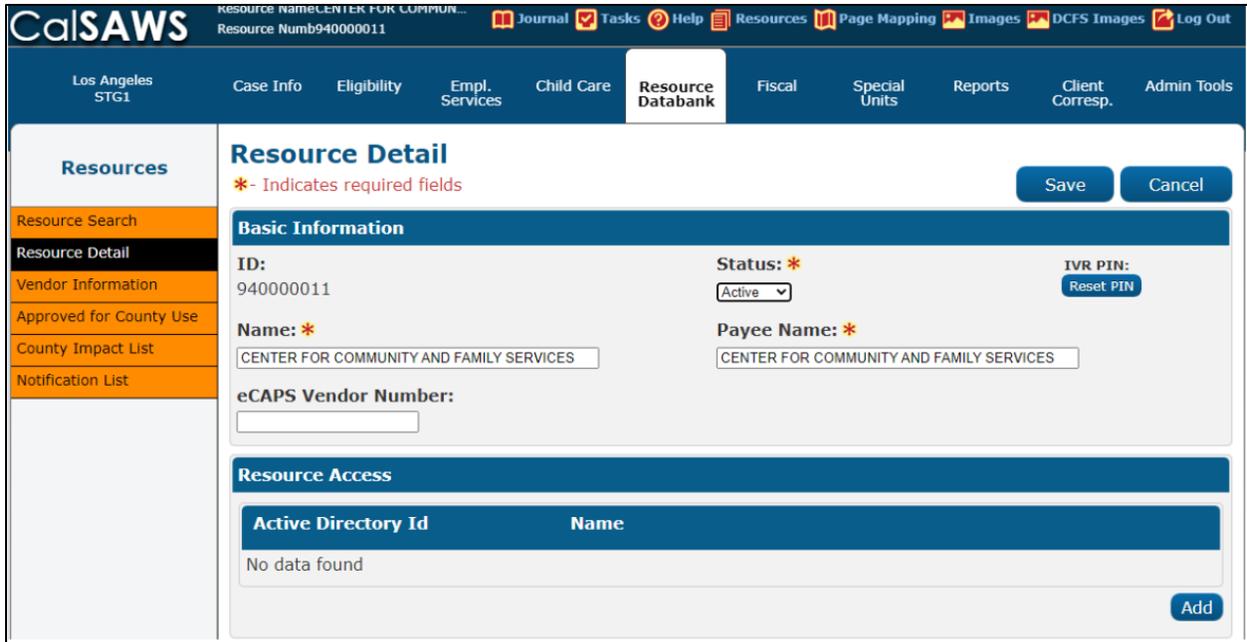


Figure 2.1.2-2 – Resource Detail Page-Reset PIN

2.1.3 Description of Change

1. Add 'IVR PIN' field to Resource Detail page.
2. Add a 'Create PIN' button underneath the 'IVR PIN' field.
 - a. When a new resource is created and the Resource Detail page doesn't have an IVR PIN, a 'Create PIN' button will be displayed right underneath the 'IVR PIN' field.
 - i. Once the user clicks on the 'Create PIN' button and saves the record, a random 6-digit PIN number will be generated, and the 'Create PIN' button will be replaced with 'Reset PIN' button.
 - b. When the Resource Detail page has an IVR PIN number generated, a 'Reset PIN' button will be displayed underneath the 'IVR PIN' field.
 - i. Clicking on 'Reset PIN' button will reset the previously generated IVR PIN with a new random 6-digit number.
3. The 'IVR PIN' field, 'Create PIN' button and the 'Reset PIN' button will be displayed only in Edit mode.
4. The IVR PIN number will not be displayed in the Resource Detail page.
5. The IVR PIN Letter will be mailed to the Resource.

2.1.4 Page Location

- **Global:** Resource Databank
- **Local:** Resources

- **Task:** Resource Detail

2.1.5 Security

N/A

2.1.6 Page Mapping

Update page mapping for the new field.

2.1.7 Page Usage/Data Volume Impact

N/A

2.2 Foster Care Resource Detail Page

2.2.1 Overview

Modify Foster Care Resource Detail page to add 'IVR PIN' field and a 'Create PIN'/'Reset PIN' button next to it.

2.2.2 Foster Care Resource Detail Page – Mockups

The screenshot displays the CalSAWS interface for the Foster Care Resource Detail page. The top navigation bar includes 'Los Angeles STG1' and various utility icons. The main menu on the left lists options like 'Foster Care Resource Search', 'Vendor Information', and 'Approved for County Use'. The 'Resource Databank' tab is active, showing the 'Foster Care Resource Detail' form. The form includes a 'Save' and 'Cancel' button at the top right. A legend indicates that an asterisk (*) denotes required fields. The form fields are as follows:

| Basic Information | | | |
|-----------------------------|-------------------------|-------------------------------|-----------------|
| ID: | Vendor Type: | CWS/CMS Vendor Number: | IVR PIN: |
| 2899353754 | Business | 566398 | Create PIN |
| Resource Name: * | Payee Name: * | | |
| Extraordinary Families | Extraordinary Families | | |
| Category: * | Secondary Payee: | | |
| Foster Care | | | |
| eCAPS Vendor Number: | Previous Name: | | |
| | | | |
| Use Between Payees: | | | |
| | | | |

Figure 2.2.2-1 – Foster Care Resource Detail Page-Create PIN

The screenshot shows the CalSAWS interface for the Foster Care Resource Detail page. The page title is "Foster Care Resource Detail". A navigation bar at the top includes "Los Angeles STG1", "Case Info", "Eligibility", "Empl. Services", "Child Care", "Resource Databank", "Fiscal", "Special Units", "Reports", "Client. Corresp.", and "Admin Tools". A sidebar on the left lists various resource management options. The main content area is titled "Foster Care Resource Detail" and includes a "Save" and "Cancel" button. Below this is a "Basic Information" section with the following fields:

| | | | |
|-----------------------------|-------------------------|-------------------------------|-----------------|
| ID: | Vendor Type: | CWS/CMS Vendor Number: | IVR PIN: |
| 2899353754 | Business | 566398 | Reset PIN |
| Resource Name: * | Payee Name: * | | |
| Extraordinary Families | Extraordinary Families | | |
| Category: * | Secondary Payee: | | |
| Foster Care | | | |
| eCAPS Vendor Number: | Previous Name: | | |
| | | | |
| Use Between Payees: | | | |
| | | | |

Figure 2.2.2-2 – Foster Care Resource Detail Page-Reset PIN

2.2.3 Description of Change

1. Add 'IVR PIN' field to the Foster Care Resource Detail page.
2. Add a 'Create PIN' button beneath the 'IVR PIN' field.
 - a. When a new Foster Care resource is created and the Resource Detail page doesn't have an IVR PIN, a 'Create PIN' button will be displayed right underneath the 'IVR PIN' field in Edit mode.
 - i. Once the user clicks on 'Create PIN' button and saves the record, a random 6-digit PIN number will be generated, and the 'Create PIN' button will be replaced with 'Reset PIN' button.
 - b. When the Foster Care Resource Detail page has an IVR PIN number generated, a 'Reset PIN' button will be displayed underneath the 'IVR PIN' field.
 - i. Clicking on 'Reset PIN' button will reset the previously generated IVR PIN with a new random 6-digit number.
3. The 'IVR PIN' field, 'Create PIN' button and the 'Reset PIN' button will be displayed only in Edit mode.
4. The IVR PIN number will not be displayed in the Foster Care Resource Detail page.
5. The IVR PIN Letter is mailed to Foster Care Resource.

2.2.4 Page Location

- **Global:** Resource Databank
- **Local:** Foster Care

- **Task:** Foster Care Resource Information

2.2.5 Security

N/A

2.2.6 Page Mapping

Update page mapping for the new field.

2.2.7 Page Usage/ Data Volume Impact

N/A

2.3 Money Management Resource Detail Page

2.3.1 Overview

Modify the Money Management Resource Detail page to add 'IVR PIN' field and a 'Create PIN'/'Reset PIN' button next to it.

2.3.2 Money Management Resource Detail Page – Mockups

The screenshot displays the CalSAWS interface for the Money Management Resource Detail page. The top navigation bar includes the CalSAWS logo, resource name (A & J Social Services, ...), resource number (2899324899), and various utility icons like Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, and Log Out. The main navigation menu shows tabs for Los Angeles STG1, Case Info, Eligibility, Empl. Services, Child Care, Resource Databank (selected), Fiscal, Special Units, Reports, Client Corresp., and Admin Tools. The left sidebar lists navigation options: Money Management (selected), Resource Search, Money Management Resource Information, Vendor Information, Approved for County Use, County Impact List, and Notification List. The main content area is titled 'Money Management Resource Detail' and contains a form with the following fields and controls:

- A red asterisk note: *** - Indicates required fields**
- Buttons: **Save** and **Cancel**
- Basic Information** section:
 - ID:** 2899324899
 - IVR PIN:** **Create PIN** button
 - Name: ***
 - Payee Name: ***
 - Category: *** Money Management
 - Type: *** Other
 - eCAPS Vendor Number:**

Figure 2.3.2-1 – Money Management Resource Detail Page-Create PIN

The screenshot shows the CalSAWS interface for the Money Management Resource Detail page. The page title is "Money Management Resource Detail". A sidebar on the left contains navigation links: Money Management, Money Management Resource Search, Money Management Resource Information, Vendor Information, Approved for County Use, County Impact List, and Notification List. The main content area includes a "Basic Information" section with the following fields:

- ID:** 2899324899
- IVR PIN:** (field with a "Reset PIN" button below it)
- Name:** * A & J Social Services, LLC
- Payee Name:** * A & J Social Services, LLC
- Category:** * Money Management
- Type:** * Other
- eCAPS Vendor Number:**

At the top right of the form area, there are "Save" and "Cancel" buttons. A legend indicates that "*" indicates required fields.

Figure 2.3.2-2 – Money Management Resource Detail Page-Reset PIN

2.3.3 Description of Change

1. Add 'IVR PIN' field to the Money Management Resource Detail page.
2. Add a 'Create PIN' button beneath the 'IVR PIN' field.
 - a. When a new Money Management Resource is created and the Money Management Resource Detail page doesn't have an IVR PIN, a 'Create PIN' button will be displayed right underneath the 'IVR PIN' field in Edit mode.
 - i. Once the user clicks on 'Create PIN' button and saves the record, a random 6-digit PIN number will be generated, and the 'Create PIN' button will be replaced with 'Reset PIN' button.
 - b. When the Money Management Resource Detail page has an IVR PIN number generated, a 'Reset PIN' button will be displayed underneath the 'IVR PIN' field.
 - i. Clicking on the 'Reset PIN' button will reset the previously generated IVR PIN with a new random 6-digit number.
3. The 'IVR PIN' field, 'Create PIN' button and the 'Reset PIN' button will be displayed only in Edit mode.
4. The IVR PIN number will not be displayed in the Money Management Resource Detail page.
5. The IVR PIN Letter will be mailed to the Money Management Resource.

2.3.4 Page Locations

- **Global:** Resource Databank
- **Local:** Money Management

- **Task:** Money Management Resource Information

2.3.5 Security Update

N/A

2.3.6 Page Mapping

Update page mapping for the new field.

2.3.7 Page Usage/Data Volume Impacts

N/A

2.4 External Party Access IVR

2.4.1 Overview

The External Party calls a specific phone number and indicates what county they are attempting to contact. They are then prompted to enter a PIN to authenticate. Once authenticated the call is routed to the destination county queue for further assistance.

2.4.2 Description of Changes

1. Implement the External Party Access IVR call flow in the Amazon connect platform.
 - a. When an External Party calls the EPA toll-free number, the caller is prompted indicate what county they are attempting to reach, by either speaking the name or entering the two-digit county code.
 - b. When the caller identifies a county, they are prompted to enter their IVR PIN.
 - c. After successful authentication, the call is then transferred to the destination county.
 - d. Authenticated calls will be higher priority than other inbound IVR calls.
2. The EPA IVR also routes callers who are unable to authenticate with their IVR PIN.
 - a. After the caller identifies the county they are calling, the call is transferred to the destination county inbound IVR.
 - b. Unauthenticated EPA calls are sent to the existing county specific IVR.
 - i. If the county specified is not a contact center the call is sent to the static phone number provided by the county.

3. Create a new EPA Specific queue in each contact center county.
 - a. Calls are routed to agents based on their routing profile.
 - b. Routing profiles are controlled by county Work Force Management and must be modified to handle these calls.
4. For non contact center counties, the caller will be transferred to a static phone number.
 - a. The project will contact each non contact center county through the CRFI process to collect the phone number that the EPA IVR should transfer calls to.

2.5 Adding New CSF 181 – New Resource IVR PIN Letter for External Party Access Form Recommendation

2.5.1 Overview

The CSF 181 – New Resource IVR PIN Letter for External Party Access form is used to inform the Resources (External Parties) of their PIN for the IVR system to call in and retrieve information.

State Form: N/A – Non-State Form

Programs: N/A – Non-Program Specific Form

Attached Forms: None

Forms Category: Forms

Template Repository Visibility: N/A

Languages: English

2.5.2 Form Verbiage

Create Form XDP

A new XDP will be created for the CSF 181 – New Resource IVR PIN Letter for External Party Access form.

Form Header: New header from section 2.7.

Form Title (Document List Page Displayed Name): New Resource IVR PIN Letter for External Party Access

Form Number: CSF 181 (01/2022)

Include NA Back 9: No

Imaging Form Name: PIN Letter for External Party Access

Imaging Document Type: Interoffice Correspondence

Imaging Case/Person: N/A

Form Mockups/Examples: See supporting document #2

2.5.3 Form Variable Population

The new CSF 181 will require variable population logic for the header and body variables.

Form Header Variables:

| Variable Name | Population | Formatting | Editable*/Field Type | Template Repository Population | Populates with Form Generation |
|----------------|--|---------------------------|----------------------|--------------------------------|--------------------------------|
| Return Address | Populates with the address of the sending office *Determined based on login user | Arial Font Size 10 | Yes/Text Field | No | Yes |
| County Of | Populates with the county <i>COUNTY_CODE from ADDR table.</i> Technical Note: ADDR table connects to ORG table through ORG_ADDR table. *Determined based on login user | Arial Font Size 10 | Yes/Text Field | No | Yes |
| Date | Populates the current date | Arial Font Size 10 | Yes/Date Field | No | Yes |
| Form Title | Populates with “New Resource IVR PIN Letter for External Party Access” | Arial Font Size 10 – Bold | Yes/Text Field | No | Yes |
| Address | Mailing Address of the | Arial Font Size 10 | Yes/Text Field | No | Yes |

| | | | | | |
|--|--|--|--|--|--|
| | organization or resource (Displayed under "Address" in each page described in sections 2.1-2.3.) | | | | |
|--|--|--|--|--|--|

Form Body Variables:

| Variable Name | Population | Formatting | Editable*/Field Type | Template Repository Population | Populates with Form Generation |
|---------------------|--|--------------------|----------------------|--------------------------------|--------------------------------|
| Organization Name 1 | Populates with the name of the organization or resource <i>BUSINESS_NAME</i> <i>from ORG table.</i> | Arial Font Size 10 | Yes/Text Field | No | Yes |
| PIN Number 1 | Populates with the 6-digit PIN generate when "Create PIN" or "Reset PIN" buttons are clicked. See sections 2.1 – 2.3. <i>PIN_NUM_IDENTIF</i> <i>from IVR_PERS table.</i> | Arial Font Size 10 | Yes/Numeric Field | No | Yes |
| Organization Name 2 | Populates with the name of the organization or resource <i>BUSINESS_NAME</i> <i>from ORG table.</i> | Arial Font Size 10 | Yes/Text Field | No | Yes |

| | | | | | |
|-----------------|--|-----------------------|----------------------|----|-----|
| PIN Number 2 | Populates with the 6-digit PIN generate when "Create PIN" or "Reset PIN" buttons are clicked. See sections 2.1 – 2.3. <i>PIN_NUM_IDENTIF from IVR_PERS table.</i> | Arial Font Size 10 | Yes/Numeric Field | No | Yes |
|-----------------|--|-----------------------|----------------------|----|-----|

Note: PIN Number 1 and PIN Number 2 are the same PINs. Organization Name 1 and Organization Name 2 are also the same names.

2.5.4 Form Generation Conditions

1. Add Form Generation

The form will generate any time a user creates a new PIN from any of the following pages:

- Resource Detail Page, or
- Foster Care Resource Detail Page, or
- Money Management Resource Detail Page

Sections 2.1 – 2.3 has added a "Create PIN" and "Reset PIN" buttons. The form will generate any time either of those buttons are clicked by the user to create a new PIN or reset their PIN.

The form will display on the Distributed Documents page and when the "Search By:" field is set to "Resource" (please see image below).

Distributed Documents Search

*- Indicates required fields

Search By:
Resource

Resource Name: Resource ID: From: *

Document Name: Document Number: Program

2. Add Form Control

The form will have the following barcode:

Due Date: N/A

| Tracking Barcode | BRM Barcode | Imaging Barcode |
|------------------|-------------|-----------------|
| N | N | N |

Note: Customers with electronic communications will still receive a paper copy of this correspondence in the mail so that they are also provided a return envelope.

3. Add Form Print Options and Mailing Requirements

The form will have the following print options:

| Blank Template | Print Local without Save | Print Local and Save | Print Central and Save | Reprint Local | Reprint Central |
|----------------|--------------------------|----------------------|------------------------|---------------|-----------------|
| N | N | N | Y | Y | Y |

Mailing Requirements:

Mail-To (Recipient): Resource or organization selected from one of the pages in sections 2.1-2.3.

Mailed From (Return): Sending Office

Mail-back-to Address: N/A

Outgoing Envelope Type: Standard

Return Envelope Type: N/A

Additional Requirements:

Special Paper Stock: None

Enclosures: None

Electronic Signature: No

CW/CF Electronic Signature (IVR/Text): No

Check to Sign: No

Post to Self Service Portal (SSP): No

2.6 Adding New NOA Date Only Header Fragment Recommendation

2.6.1 Overview

The new header is created to be used when a form header only requires the date to be populated. The new header is used when a form is not tied to a specific case or program.

Languages: English

2.6.2 Header Verbiage

Create Header XDP

A new XDP will be created for the CSF 181 – PIN Letter for External Party Access form. The new header will replicate the CalSAWS Standard Header (HEADER_1), with the following fields removed:

- Case Name
- Case Number
- Worker Name
- Worker ID
- Worker Phone Number
- Customer ID

Example:

2.6.3 Header Variable Population

The new CSF 181 will require variable population logic for the body variables.

| Variable Name | Population | Formatting* |
|----------------|---|-----------------------------|
| Form Name | Populates with the form title | Arial Font Size 10 - Bolded |
| County Of | Populates with the county name | Arial Font Size 10 |
| Return Address | Populates with Mail-Back-To address | Arial Font Size 10 |
| Address | Populates with the address of the recipient | Arial Font Size 10 |

*English only, Spanish and threshold will generate based on project standards for that language.

Variables Requiring Translations: N/A

3 SUPPORTING DOCUMENTS

| Number | Functional Area | Description | Attachment |
|--------|---|--|-------------------------------------|
| 1 | AWS External Party Access IVR Detailed Call flow. | Call flow diagram represents External Party Access call flow, AWS EPA IVR Detailed Call Flow.pdf | External Party Access Call Flow.pdf |
| 2 | Forms | CSF 181 Mockup | CSF181_EN.pdf |

4 PROJECT REQUIREMENTS

| REQ # | REQUIREMENT TEXT | How Requirement Met |
|-----------|--|---------------------|
| DDID 2216 | The CONTRACTOR shall configure the customer Service Center solution to allow authorized external parties (CBO's, other Providers, County Agencies) to call a specific phone number, authenticate with a PIN, and be transferred to the call's destination County agent. This solution will only support English. | Section 2.4.2 |
| DDID 2725 | The Contractor shall configure the External Party Access solution to include unique PINs, assigned and managed by the County in the CalSAWS Application to be used by the external parties for identification and authentication purposes. | Section 2.6 |