

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-226838 CSC: Telephonic Signatures

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1 OVERVIEW

1.1 Current Design

CalSAWS does not include functionality to capture an audio recording of a Telephonic Signature.

1.2 Requests

Allow functionality to capture an audio voice recording of a Telephonic Signature for CalSAWS forms and documents to be signed by a customer.

1.3 Overview of Recommendations

1. The Distributed Documents Search page:
 - a. The Distributed Documents Search page allows users to search for and view documents that have been generated for a Case. This page also allows access to the Document Detail page.
 - b. Update the page label/name to Distributed Documents Select when it is accessed via the Electronic Signature page.
 - c. Add a checkbox column, to the Search Results Summary table, to select a document row or rows to be added for a Telephonic Signature (see figure 2.2.2.1).
2. The Document Detail page:
 - a. The Document Detail page allows users to view details associated to a document or mark the document as signed; the page also allows access to the Electronic Signature page or to the Electronic Signature Document Detail page if the document has been signed.
 - b. Update the 'eSign' and 'View eSign' buttons to 'eSign / Telephonic' and 'View eSign / Telephonic'.
3. The Electronic Signature page:
 - a. This page allows users to create, view and cancel requests for Electronic Signatures. The page offers a Check to Sign option and CW/CF eSign options but does not offer an option to make an audio recording of a Telephonic Signature
 - b. Add an option to record audio of a Telephonic Signature, and to select additional documents that the Telephonic Signature will apply to. Add the ability to listen to, download, and edit a transcript of the Telephonic Signature audio. Add an additional Signature History section for each additional document associated to the signature
4. The Distributed Document Search page:
 - a. This page allows users to search for and view documents that have been generated for a Case/Participant, and allows access to the Document Detail page
 - b. Add a checkbox column, to the Search Results Summary table, to select a document row or rows to be added for a Telephonic Signature (see figure 2.2.2.1).
5. Electronic Signature Document Detail page:

- a. This page allows users to view details about an Electronic Signature for a particular document, including the time/date of a Signature, the name(s) of the Person(s) who signed a document, as well as Signature History for the document
 - b. Update the page to show names and history for multiple documents associated to a Telephonic Signature
6. IVR Application:
 - a. Create a new Amazon Connect call flow to record the Telephonic Signature.
 - b. Record a unique Telephonic Signature recording for each customer's voice.
 - c. Utilize "AWS Transcribe" to transcribe the customer's acknowledgement.
 - d. Utilize AWS Comprehend to validate the transcription matches the expected telephonic signature phrase.
 - e. Associate the Telephonic Signature recording to the signed document(s) using the Capture Code.
 - f. Create a new API to request that the IVR initiate an outbound call and capture a "Telephonic Signature".
 - g. Create a new SQS service to validate if the customer successfully recorded their voice.
 - h. Utilize the Task API to create a Task if the customer failed to record their telephonic signature.
7. Call Control Panel (CCP):
 - a. Add "Start", "Stop", and "Reset" buttons to the CCP
 - b. Capture the call recording time stamp when the Start button is pressed
 - c. Capture the call recording time stamp when the Stop button is pressed
 - d. Update the call recording time stamp used for the start time when the reset button is pressed.
 - e. Upon completion of the call, capture the call recording segment for the telephonic signature.
8. Task API:
 - a. The Task API allows external applications to create tasks in CalSAWS. The API does not have any data element thru which a specific Telephonic Signature recording can be referenced
 - b. Add a data element to the Task API to hold a reference to a specific Telephonic Signature recording
9. Task Detail page:
 - a. The Task Detail page allows users to view and edit Tasks. There is no Task Type "Telephonic Signature Quality" and no link added on the page for Tasks of this Type.
 - b. Add a "Telephonic Signature Quality" Task Type and add a link on the page, when this is the Task Type, navigating to the Electronic Signature page for the associated Case and documents.

1.4 Assumptions

1. The phrase that will be used by CalSAWS as a Telephonic Signature will be standardized across all counties for analysis purposes.
2. The recording will be less than 30 seconds in length.
3. AWS Transcribe only supports the following languages, English, Spanish, Farsi, Mandarin, Russian, Korean, Arabic. All other languages will not be transcribed automatically. Unsupported languages will display the message "Language not supported by Transcription"
4. Existing CalSAWS application fields and functionality will remain unchanged unless it is mentioned in the Description of Changes section below.

2 RECOMMENDATIONS

2.1 Distributed Documents Search page

2.1.1 Overview

The Distributed Document Search page allows users to search for and view documents that have been generated for a Case. This page also allows access to the Document Detail page.

Update the page label/name to Distributed Documents Select when it is accessed via the Electronic Signature page.

Add a checkbox column, to the Search Results Summary table, to check/select a document row or rows to be added for a Telephonic Signature (see figure 2.2.2.1).

2.1.2 Distributed Documents Search Mockup

Distributed Documents

Distributed Documents Search

Enclosure

Distributed Documents Search

*- Indicates required fields

▼ Refine Your Search Search

Search By:
 Go

Case Number: *

From: *
 📅

To: *
 📅

Language:

Document Name:

Document Number:

Program:

eSign / Telephonic:

Results per Page: Search

Search Results Summary Results 1 - 5 of 5

	Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
<input type="checkbox"/>	07/20/2021 1:08 PM	Application for CalFresh, Cash Aid, And/Or Medi-Cal/Health Care Programs (ENG)	SAWS 2 PLUS	CalFresh	Printed Locally	Details
	07/20/2021 1:05 PM	Authorized Representative Designation for Cash Benefits (ENG)	CSF 117	CalFresh	Printed Locally	Details
<input type="checkbox"/>	07/16/2021 11:57 AM	Application for CalFresh Benefits (ENG)	CF 285	CalFresh	Printed Locally	Details
	07/16/2021 11:49 AM	Request for Verification / Certification of Evidence (ENG)	PA 230	CalFresh	Printed Locally	Details
	07/16/2021 11:27 AM	Customer Service Center ID Card (ENG)	PA 6049	CalFresh	Hold For Pickup	Details
	07/15/2021 11:49 AM	Applicant's Authorization for Release of Information	ABCDM 228	CalFresh	Printed Locally	Details

eSign / Telephonic
Cancel

Figure 2.1.2.1 - Distributed Documents Search page

Distributed Documents

Distributed Documents Select

*- Indicates required fields

▼ Refine Your Search Search

Search By:
 Go

Case Number: *

Document Name:

From: *
 📅

Document Number:

To: *
 📅

Program:

Language:

eSign / Telephonic:
 📅

Results: Search

Search Results Summary
Results 1 - 5 of 5

	Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
<input checked="" type="checkbox"/>	07/20/2021 1:08 PM	Application for CalFresh, Cash Aid, And/Or Medi-Cal/Health Care Programs (ENG)	SAWS 2 PLUS	CalFresh	Printed Locally	Details
<input type="checkbox"/>	07/16/2021 11:57 AM	Application for CalFresh Benefits (ENG)	CF 285	CalFresh	Printed Locally	Details
<input type="checkbox"/>	07/16/2021 10:31 AM	Recertification for CalFresh benefits (TAG)	CF 37	CalFresh	Hold For Pickup	Details

eSign / Telephonic
Cancel

Figure 2.1.2.2 - Distributed Documents Select page

2.1.3 Description of Changes

1. Update the Distributed Documents Search page so that, when the page is opened via the 'Add Document' button on the Electronic Signature page:
 - a. The page is labeled as 'Distributed Documents Select'
 - b. The Task navigation is empty and
 - c. The Search Results Summary displays only documents that are Telephonically signable, i.e., the document type can be signed electronically and an Electronic Signature for the specific generated document has not yet been completed for all signers
2. In the 'Refine Your Search' expandable section:
 - a. Add new 'eSign / Telephonic' label and dropdown, with options for:
 - i. BLANK: when this option is selected do not limit the search

- ii. "Completed": When this option is selected limit the search to only documents that have a completed eSignature or a completed Telephonic Signature
 - iii. "Signable": When this option is selected limit the search to only documents that are electronically signable, whether or not they have been signed i.e., the document type can be signed
 - iv. "Not Signed": When this option is selected limit the search to only documents that have not been signed electronically or telephonically
 - b. Add space/padding between the left column of labels / text fields and the edge of the panel
- 3. Update CalSAWS so that forms that currently have either (or both) of the existing Electronic Signature capabilities enabled, CW/CF eSign or Check to Sign, also have the new Telephonic Signature capability enabled. A list can be found with Supporting Document 'CA-226838 Forms for Telephonic Signature.xlsx'
- 4. Add a checkbox column to the Search Results Summary table:
 - a. Add a main checkbox to the header column to select or de-select all checkboxes in the table
 - b. The checkbox in the results row(s) will select or deselect for the specific row; show a checkbox only for document rows that are Telephonically signable, and not yet signed
 - c. Default document row(s) that are currently associated to the signature as checked, when this page is reached via the Electronic Signature page
- 5. Add an 'eSign / Telephonic' button below the Search Results Summary table. This button will:
 - a. Hide this button if none of the returned documents are Telephonically signable, i.e., the document type can be signed electronically and an Electronic Signature for the specific generated document has not yet been completed for all signers
 - b. If the user's selection(s) would result in more than 25 documents being associated to a Telephonic Signature request, show a validation message as: "A maximum of 25 documents may be associated to a Telephonic Signature. Please remove one or more documents."
 - c. Navigate to the Electronic Signature page
 - d. If no documents are selected, show a validation message as: "Please select one or more documents."
 - e. If the user adds/re-adds a document that is already associated to the Telephonic Signature, only display it in the Electronic Signature page's Documents table once

2.1.4 Page Location

- **Global: Client Corresp.**
- **Local: Distributed Documents**
- **Task: Distributed Documents Search**

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

1. Update page mapping with new and updated fields.
2. Add page mapping for all fields under the 'Distributed Documents Select' page name.

2.1.7 Page Usage/Data Volume Impacts

N/A

2.2 Document Detail page

2.2.1 Overview

The Document Detail page allows users to view details associated to a document or mark the document as signed; the page also allows access to the Electronic Signature page or to the Electronic Signature Document Detail page if the document has been signed.

Update the 'eSign' and 'View eSign' buttons to 'eSign / Telephonic' and 'View eSign / Telephonic'.

2.2.2 Document Detail page Mockup

Document Detail

[Reprint Locally](#) [View eSign / Telephonic](#) [Edit](#) [Close](#)

Document Information		
Name: Application for CalFresh, Cash Aid, And/Or Medi-Cal/Health Care Programs (ENG)	Number: SAWS 2 PLUS	Category: Application
Program: CalFresh	Benefit Month:	Self-Service Portal:
Date Signed:	Comments:	

Variation	Language	Initial Print Date	Last Central Print Date	Print Status
Final	English			Printed Locally

[Reprint Locally](#) [View eSign / Telephonic](#) [Edit](#) [Close](#)

Figure 2.2.2.1 - Document Detail page

2.2.3 Description of Changes

1. Update the 'eSign' and 'View eSign' buttons to 'eSign / Telephonic' and 'View eSign / Telephonic'.

2.2.4 Page Location

- **Global: Client Corresp.**
- **Local: Distributed Documents**
- **Task: Distributed Documents Search**

2.2.5 Security Updates

N/A

2.2.6 Page Mapping

N/A

2.2.7 Page Usage/Data Volume Impacts

N/A

2.3 Electronic Signature page

2.3.1 Overview

The Electronic Signature page allows users to create, view and cancel requests for Electronic Signatures. The page offers a Check to Sign option and CW/CF eSign options but does not offer an option to make an audio recording of a Telephonic Signature.

Add an option to record audio of a Telephonic Signature and to select additional documents that the Telephonic Signature will apply to. Add the ability to listen to, download, and edit a transcript of the Telephonic Signature audio. Add an, additional, Signature History section for each document associated to the signature.

2.3.2 Electronic Signature Mockup

Electronic Signature

*- Indicates required fields

Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

Language: *

Signature Method: *	Number of Signatures: *	Worker Name:	Worker ID:			
<input type="text" value="Telephonic"/>	<input type="text" value="1"/>	Gerald Limbrick	90LS002000			
Associated Documents						
<input type="checkbox"/>	Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
<input type="checkbox"/>	07/20/2021 1:08 PM	Application for CalFresh, Cash Aid, And/Or Medi-Cal/Health Care Programs (ENG)	SAWS 2 PLUS	CalFresh	Printed Locally	
<input type="button" value="Remove"/>		<input type="button" value="Add Document"/>				
Person *	Date of Birth	Capture Code	Value	Status		
<input type="text"/>				Not Sent		
Audio and Transcript						

Figure 2.3.2.1 – Electronic Signature page (not yet saved)

Electronic Signature

* - Indicates required fields

• This Call was just started. Please click Cancel or Save to reload the page and try again.

Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

Language: *

Generate Form

Signature Method: *
Telephonic

Number of Signatures: *
2

Worker Name:
Gerald Limbrick

Worker ID:
90LS002000

Associated Documents

■	Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
<input type="checkbox"/>	07/20/2021 1:08 PM	Application for CalFresh, Cash Aid, And/Or Medi-Cal/Health Care Programs (ENG)	SAWS 2 PLUS	CalFresh	Printed Locally	
<input type="checkbox"/>	07/20/2021 1:05 PM	Authorized Representative Designation for Cash Benefits (ENG)	CSF 117	CalFresh	Printed Locally	

Remove
Add Document

Person *

Person *	Date of Birth	Capture Code	Value	Status
Tester, Primary 33M	07/16/1988	10,000,001 Copy	(916)876-5432 ext. 1234	Sent Call
Tester, Partner 33F	07/16/1988	10,000,002 Copy	012 345 6789 ext. <input type="text"/>	Not Sent Call

Audio and Transcript

Tester, Primary 33M

Press the Save or Cancel buttons, after the call ends to view and edit a text transcript of the call audio.

Tester, Partner 33F

Press the Save or Cancel buttons, after the call ends to view and edit a text transcript of the call audio.

Signature History - CSF 117 [View PDF](#)

Tester, Primary 33M				
Date/Time	Signature Capture Type	Value	Status	Expiration Date
06/05/2022 11:45:04 AM	Telephonic	(916)876-5432 ext. 1234	Sent	06/08/2022
06/05/2022 11:41:22 AM	Telephonic		Not Sent	06/08/2022

Tester, Partner 33F				
Date/Time	Signature Capture Type	Value	Status	Expiration Date
06/05/2022 11:41:22 AM	Telephonic		Not Sent	06/08/2022

Signature History - SAWS 2 PLUS [View PDF](#)

Save
Cancel

Figure 2.3.2.2 – Electronic Signature page (Call Button Just Pressed)

Electronic Signature

* - Indicates required fields

Read all the information below very carefully. When you are done, press **Save** on the bottom to indicate that all the information provided on the application is accurate. You can still change the information on the application now.

Language: *

Signature Method: *	Number of Signatures: *	Worker Name:	Worker ID:
Telephonic	2	Gerald Limbrick	90LS002000

Associated Documents

Date	Document Name	Number	Program	Status	Viewed Via Self-Service Portal
07/20/2021 1:08 PM	Application for CalFresh, Cash Aid, And/Or Medi-Cal/Health Care Programs (ENG)	SAWS 2 PLUS	CalFresh	Printed Locally	<input type="checkbox"/>
07/20/2021 1:05 PM	Authorized Representative Designation for Cash Benefits (ENG)	CSF 117	CalFresh	Printed Locally	<input type="checkbox"/>

Person *	Date of Birth	Capture Code	Value	Status
Tester, Primary 33M	07/16/1988	10,000,001 <input type="button" value="Copy"/>	(916)876-5432	Received
Tester, Partner 33F	07/16/1988	10,000,002 <input type="button" value="Copy"/>	012 345 6789 ext. <input type="text"/>	Not Sent <input type="button" value="Call"/>

Audio and Transcript

Tester, Primary 33M

This is my telephonic signature This is my telephonic signature This is my telephonic signature This is my telephonic signature This is my telephonic signature This is my telephonic signature This is my telephonic signature This is my telephonic signature This is my telephonic signature This is my telephonic signature

Tester, Partner 33F

Press the Save or Cancel buttons, after the call ends to view and edit a text transcript of the call audio.

Signature History - CSF 117 [View PDF](#)

Tester, Primary 33M

Date/Time	Signature Capture Type	Value	Status	Expiration Date
06/05/2022 11:47:55 AM	Telephonic	(951)373-5432	Received	06/08/2022
06/05/2022 11:45:04 AM	Telephonic	(951)373-5432	Sent	06/08/2022
06/05/2022 11:41:22 AM	Telephonic		Not Sent	06/08/2022

Tester, Partner 33F

Date/Time	Signature Capture Type	Value	Status	Expiration Date
06/05/2022 11:41:22 AM	Telephonic		Not Sent	06/08/2022

Signature History - SAWS 2 PLUS [View PDF](#)

Figure 2.3.2.3 – Electronic Signature page (with a Received Transcript)

2.3.3 Description of Changes

1. Update the 'Signature Method' dropdown:
 - a. Add "Telephonic" as a new option in the 'Signature Method' dropdown, when this option is selected, display:
 - i. The Associated Documents section (described below)
 - ii. The Person table, and
 - iii. The 'Audio and Transcript' section (described below)
 - b. Display the 'Signature Method' dropdown as a static text field if there are more than one Associated Documents; when removing the second to last document the field will remain static text until the page is reloaded
2. Add an Associated Documents section:
 - a. Hide this section until/unless "Telephonic" is the selected Signature Method
 - b. Add an unlabeled, sortable, Documents table, populated the same as on the Distributed Document Search page:
 - i. Table Columns
 1. Checkbox: used to select document(s) for removal from the eSignature request
 2. 'Date'
 3. 'Document Name'
 4. 'Number'
 5. 'Program'
 6. 'Status' **Note:** this is the print status as shown on the Distributed Document Search page
 7. 'Viewed Via Self-Service Portal'
 - ii. Populate the Documents table with any documents currently associated by Capture Code to the selected document:
 1. Add the association when a Signature request is saved with multiple documents
 2. Remove the association when a Signature request is saved after removing a document
 3. Order the rows alphanumerically by Document Number, by default
 4. Expand the table vertically to display additional documents, as they are added, without a separate scroll bar being added to the table
 - c. Add a 'Remove' button: When this button is pressed:
 - i. If the Telephonic Signature is in Received Status for one of the Persons:
 1. Remove the selected document(s), and on saving, remove the document's association to the signature request
 2. Add a message to the top of the page advising the user that the previously received

signature will be discarded, as: "Changing the documents after one of the signatures is Received will cancel and re-create the request; this will delete the Received signature."

Note: The page is not accessible when the signature is complete (signed by 2 Persons)

- ii. If no signature has been received:
 - 1. Remove the selected document(s) from the signature request and
 - 2. On saving, remove the document's association to the signature request
- iii. If a document is removed after a Capture Code has been assigned (it is assigned after saving):
 - 1. Cancel the previous request and
 - 2. Create a new Capture Code, when the 'Save' button is pressed.

Note: Do not create a new Capture Code when the same document(s) are re-added before saving, undoing the change(s)

- d. Add an 'Add Document' button. This button will:
 - i. If 25 documents are already associated to the Telephonic Signature request, show a validation message as: "A maximum of 25 documents may be associated to a Telephonic Signature."
 - ii. If 25 documents have not already been associated by Capture Code, navigate to the Distributed Documents Search page, relabeled as 'Distributed Documents Select'
 - iii. Hide this button when a Telephonic Signature is in Received Status for one of the Persons
 - iv. If a document is added after a Capture Code has been assigned (it is assigned after saving):
 - 1. Cancel the previous request and
 - 2. Create a new Signature request record with a new Capture Code, when the 'Save' button is pressed.

Note: Do not create a new Capture Code when the same document(s) are removed again before saving, undoing the change(s)

- 3. Add logic so that the user's selections for Signature Method, Number of Signatures and Associated Documents are re-added when the user returns to this page from the Distributed Documents Select page. **Note:** Selections will not be saved when the user navigates to other pages unless the 'Save' button is pressed.

4. Update the Person table, when "Telephonic" is selected as the Signature Method:
 - a. Add a 'Capture Code' column:
 - i. This column, after saving, will hold a unique Capture Code used to associate the Telephonic Signature, for the Person, in CalSAWS to the IVR application's recording, and used to associate multiple documents to the Telephonic Signature
 - ii. Add a 'Copy' button after the Capture Code: This button will add the Capture Code to the computer's clipboard for pasting into another application
 - b. Update the 'Value' column:
 - i. When the Telephonic Signature record has not yet been saved, show this field as BLANK
 - ii. After the initial save of a Telephonic type signature record, show two input fields:
 1. An unlabeled, Phone Number, text input field:
 - a. Add placeholder text: "012 345 6789"
 - b. When the page is saved (or the 'Call' button is pressed), format the number as "(" + DDD + ")" + DDD + "-" + DDDD e.g. (916)123-1234 ; if the number starts with "0" or is unable to be properly formatted, because of an incorrect number of digits entered, display a message in the validation section of the page as: "The phone number must be in the form (999)999-9999 and cannot start with a zero."

Note: Non-numeric characters can be pasted into the Phone Number field but will be removed before the number is formatted for saving
 2. An Extension field, labeled "ext.", with entry limited to a maximum of 4 numeric digits; hide the label and field, when the record is in Received Status unless an extension was entered
 - iii. Show the Phone Number and Extension as text only, when:
 1. When the Status is Received or
 2. When the current load of the page was initiated by the 'Call' button (described below) i.e., when the 'Call' button is gray
 - c. For the 'Status' field, show the Status of the Signature request:
 - i. Not Sent: This is the initial Status; the signature request has not been sent to Amazon Connect or the

Signature/call request has been edited since it was last sent to Amazon Connect **Note:** If the Signature request record is edited after the call request is sent to Amazon Connect, the IVR application will be able to update the record which would revert/overwrite the edits.

- ii. Sent: The signature request has been sent, to initiate a call to the provided Phone Number
 - iii. Sending Error: An error occurred while communicating the signature/call request to Amazon Connect
 - iv. Incorrect Response: The IVR application has reported either an error or that the Telephonic Signature was attempted but NOT successfully captured e.g., the recording did not meet quality standards
 - v. Canceled: The signature request can no longer be completed **Note:** A new signature request can be created
 - vi. Received: The Telephonic Signature has been completed, for the Person
- d. Update the 'Send'/'Resend' button to 'Call' for Telephonic type signature requests
- e. Update the 'Call' button logic; this button will:
- i. This button will be hidden when a Telephonic type of signature record is not yet saved, or when the Person's Telephonic Signature is in Received Status
 - ii. Format and validate the Value field, as described above
 - iii. Send the Telephonic Signature request, initiating a call from the IVR application to the phone number entered in the 'Value' column:
 - 1. Request the call in the Person's preferred Spoken Language, if supported, as selected on the Individual Demographics Detail page. Supported languages for the outbound call are:
 - a. English
 - b. Spanish
 - c. Farsi
 - d. Vietnamese
 - e. Mandarin
 - f. Armenian
 - g. Tagalog
 - h. Russian
 - i. Korean
 - j. Cambodian
 - k. Hmong
 - l. Cantonese

- m. Arabic
 - n. Lao
 - 2. If the customer's preferred Spoken Language is not supported call the customer in English
 - 3. Send the Case#, County, Extension, and Capture Code with the request, for use by the IVR application
 - iv. Save the signature request in Sent Status
 - v. If an error occurs in sending to Amazon Connect, save the signature request in Sending Error status

Note: Any new Status will not display until the page is reloaded
 - vi. Reload the page, updating this button to gray with black text, when this button initiated the current load of the page, i.e., the button was just pressed; when gray, show a validation message, if pressed, as: "This Call was just started. Please click Cancel or Save to reload the page and try again."

Note: The CalSAWS application or the IVR application will update the record's Status, if needed but the Status will not show on the page until it is reloaded.
5. Add an 'Audio and Transcript' section:
 - a. Hide this section until/unless "Telephonic" is the selected Signature Method
 - b. Add, inner, Person sections for each Person associated to the signature request:
 - i. Order the sections in the same order as the Person table's rows
 - ii. Label each Person section with the text from the associated Person dropdown in the Person table e.g., "Smith, John 33M"
 - iii. Hide/unhide the section for each Person when their name is unselected/ selected in one of the Person dropdowns
 - iv. Add a text input area, 3 rows tall and spanning the width of the Person section:
 - 1. Add a scroll bar to view additional rows of text
 - 2. Add placeholder text: "Press the Save or Cancel buttons, after the call ends to view and edit a text transcript of the call audio."
 - 3. Each time the page is reloaded check for any saved updates to the transcript text
 - 4. Save any edits when the page is saved, or revert to the last saved text, if the 'Cancel' button is pressed

Technical Note: Remove, programming language, special characters from the edited Transcript before saving.

- v. Add a Speaker icon:
 - 1. Clicking this icon will play the recorded Telephonic Signature audio
 - 2. Hovering over this icon will display tooltip text as: "Play Audio"
 - 3. Set image alternate text as: "Play Audio"
 - 4. Hide this icon when no Telephonic Signature audio was available at the time the page loaded
- vi. Add a 'Download Audio' button:
 - 1. This button will initiate a download of the Telephonic Signature audio using the browser's file download functionality
 - 2. Name the file as: "Telephonic Signature_" + {capture code} e.g., "TelephonicSignature_10,000,001"
 - 3. Hide this button when no Telephonic Signature audio is available
- 6. Update the 'Save' button logic, when "Telephonic" is the selected Signature Method:
 - a. Create and display a unique Capture Code for each, new, Person row; Capture Codes will start at 10,000,000 and increment by 1 each time a new code is created
 - b. Add the 'Copy' button right of the unique code, as described above
 - c. Add/unhide or format/validate the text input fields, in the Value column, for Phone Number and Extension
 - d. Save the Signature request; if the Phone Number or Extension has been edited but the Signature request has not been sent (i.e. the 'Call' button was not pressed), save the Signature request in Not Sent Status
 - e. Display/unhide the 'Call' button; show the button as a blue color until the 'Call' button is pressed, then gray until the 'Save' or 'Cancel' buttons are pressed, or until the page is reloaded
 - f. Reload the text Transcript of the Telephonic Signature audio, saving any edits
 - g. Reload the page, or, if a Person was removed from a 2 Person Signature request and the Signature is in Received Status for the remaining Person, update the Telephonic Signature as complete, and navigate to the Electronic Signature Document Detail page

2.4 Electronic Signature Document Detail page

2.4.1 Overview

The Electronic Signature Document Detail page allows users to view details about the Electronic Signature for a particular document, including the time/date of a Signature, the name(s) of the Person(s) who signed a document, and Signature History for the document.

Update the page to show names and history for multiple documents associated to a Telephonic Signature.

2.4.2 Electronic Signature Document Detail Mockup

Electronic Signature Document Detail

Save Close

Document Name(s)
 ARC 1
 CCP 7

WTW 44

Date Signed
 Friday, June 05, 2022 11:47:55:481 AM

Signatures

ID	Name	eSign Name
IN-20000001	Tester, Primary 32M	Tester, Primary 32M
IN-20000002	Tester, Secondary 20F	Tester, Secondary 20F

Audio and Transcript

Tester, Primary 33M

This is my telephonic signature

Download Audio

Tester, Partner 33F

This is my telephonic signature

Download Audio

Signature History - ARC 1 [View PDF](#)

Tester, Primary 32M

Date/Time	Signature Capture Type	Value	Status	Expiration Date
06/05/2022 11:47:55 AM	Telephonic	(951)373-5432	Received	06/08/2022
06/05/2022 11:45:04 AM	Telephonic	(951)373-5432	Sent	06/08/2022
06/05/2022 11:41:22 AM	Telephonic		Not Sent	06/08/2022

Tester, Secondary 20F

Date/Time	Signature Capture Type	Value	Status	Expiration Date
06/05/2022 11:46:16 AM	Telephonic	(951)384-4321	Received	06/08/2022
06/05/2022 11:46:04 AM	Telephonic	(951)384-4321	Sent	06/08/2022
06/05/2022 11:41:22 AM	Telephonic		Not Sent	06/08/2022

Signature History - CCP 7 [View PDF](#)

Signature History - WTW 44 [View PDF](#)

Save Close

Figure 2.4.2.1 Electronic Signature Document Detail

Electronic Signature Document Detail

Save Close

Document Name(s)
ARC 1
CCP 7
CCP 8
CF 10
CF 285
CF 303
CF 37
CF 377.5 CR
CF 385
CW 2209
CW 2218
CW 2219
CW 52
CW 80
CW 8A
NA 1273
SAR 23
SAR 3
SAR 7/SAR 2
SAR 73
SAWS 2 PLUS
TEXT 100
TNB 4 Recert Packet
WTW 17
WTW 44

Date Signed
Friday, June 05, 2022 11:47:55:481 AM

Signatures

ID	Name	eSign Name
IN-20000001	Tester, Primary 32M	Tester, Primary 32M

Figure 2.4.2.2 - Document Name(s) section

 [Download Audio](#)

Signature History - ARC 1 [View PDF](#)

Tester, Primary 32M

Date/Time	Signature Capture Type	Value	Status	Expiration Date
06/05/2022 11:47:55 AM	Telephonic	(951)373-5432	Received	06/08/2022
06/05/2022 11:45:04 AM	Telephonic	(951)373-5432	Sent	06/08/2022
06/05/2022 11:41:22 AM	Telephonic		Not Sent	06/08/2022

Tester, Secondary 20F

Date/Time	Signature Capture Type	Value	Status	Expiration Date
06/05/2022 11:46:16 AM	Telephonic	(951)384-4321	Received	06/08/2022
06/05/2022 11:46:04 AM	Telephonic	(951)384-4321	Sent	06/08/2022
06/05/2022 11:41:22 AM	Telephonic		Not Sent	06/08/2022

Signature History - CCP 7 [View PDF](#)

Signature History - CCP 8 [View PDF](#)

Signature History - CF 10 [View PDF](#)

Signature History - CF 285 [View PDF](#)

Signature History - CF 303 [View PDF](#)

Signature History - CF 37 [View PDF](#)

Signature History - CF 377.5 CR [View PDF](#)

Signature History - CF 385 [View PDF](#)

Signature History - CW 2209 [View PDF](#)

Signature History - CW 2218 [View PDF](#)

Signature History - CW 2219 [View PDF](#)

Signature History - CW 52 [View PDF](#)

Signature History - CW 80 [View PDF](#)

Signature History - CW 8A [View PDF](#)

Signature History - NA 1273 [View PDF](#)

Signature History - SAR 23 [View PDF](#)

Signature History - SAR 3 [View PDF](#)

Signature History - SAR 7/SAR 2 [View PDF](#)

Signature History - SAR 73 [View PDF](#)

Signature History - SAWS 2 PLUS [View PDF](#)

Signature History - TEXT 100 [View PDF](#)

Signature History - TNB 4 Recert Packet [View PDF](#)

Signature History - WTW 17 [View PDF](#)

Signature History - WTW 44 [View PDF](#)

[Save](#) [Close](#)

Figure 2.4.2.3 - Signature History section

2.4.3 Description of Changes

1. Update the 'Document Name' field:
 - a. Re-label the field to 'Document Name(s)' and
 - b. Update it to show all documents associated to the same Capture Code, formatted as an alphanumeric list
2. Add the 'Audio and Transcript' section (see the Electronic Signature page section of this document). Protect the transcript text from edits with the ElectronicSignatureEdit security rights; set the transcript text as un-editable/read only unless the user has these rights.
3. Update the Signature History: Add an expandable section for each document, modified as done for the Electronic Signature page (see the Electronic Signature page section of this document).
4. Add a 'Save' button to the top and bottom button rows, when the transcript text is available and editable i.e., the Signature Method is Telephonic, and the user has the needed security rights:
 - a. This button will save any edits to the text transcript(s) of the Telephonic Signature audio and reload the page
 - b. Protect this button with the ElectronicSignatureEdit security rights; hide the button if the user does not have these security rights

2.4.4 Page Location

- **Global: Client Corresp.**
- **Local: Distributed Documents**
- **Task: N/A**

2.4.5 Security Updates

N/A

2.4.6 Page Mapping

Update the page mapping for new and updated fields.

2.4.7 Page Usage/Data Volume Impacts

N/A

2.5 IVR Application

2.5.1 Overview

The IVR Application receives requests from the CalSAWS application to place an outbound call to a customer to record their telephonic signature. It also captures the time stamp of an ongoing recorded conversation to be used as the customer's telephonic signature.

2.5.2 Description of Changes

1. Create a new Telephonic Signature IVR application that will place an outbound call, record the customer's telephonic signature, and optionally read aloud the rights and responsibilities.
 - a. This is accessible through the Call button in CalSAWS as described in section 2.3.3.
 - b. For more information see the attached call flow, CA-226838 – Telephonic Signature Call Flow.
2. Create a new Rights and Responsibility Transfer flow to read the Rights and Responsibilities to the customer at the conclusion of a call.
 - a. This is accessible through the CCP quick connects only.
 - b. For more information see the attached call flow, CA-226838 – Telephonic Signature Call Flow.
3. Create a new Amazon Simple Query Service to validate if the customer successfully signed the documents or not after the outbound call is placed.
 - a. This only applies to the Non-Contact Center signature capture.
 - b. Ten minutes after the outbound call is placed validate if the signature was completed.
4. Create a new Amazon Transcribe service to automatically transcribe the text of the customer's telephonic signature.
 - a. Automatic transcription is only supported by the following languages.
 - i. English
 - ii. Spanish
 - iii. Farsi
 - iv. Mandarin
 - v. Russian
 - vi. Korean
 - vii. Arabic
 - b. All other languages will not be automatically transcribed.
 - i. This functionality will be added in as Amazon Transcribe supports additional languages.
5. Create a new Lambda to create a task when a customer fails to record their acknowledgement
 - a. This lambda to send a request to the Task API to create a new Task with the Task Type "Telephonic Signature Not Complete"

6. Create a new Amazon Comprehend service to analyze the telephonic signature and transcription.
7. Create a new Lambda to create a task when a customer's recording doesn't meet quality standards.
 - a. This lambda to send a request to the Task API to create a new Task with the Task Type "Telephonic Signature Quality"

2.5.3 Page Location

N/A

2.5.4 Security Updates

N/A

2.5.5 Page Mapping

N/A

2.5.6 Page Usage/Data Volume Impacts

N/A

2.6 Call Control Panel

2.6.1 Overview

The Call Control Panel (CCP) allows contact center agents to receive and handle calls. The call between the agent and customer is being recorded.

Add in “Start”, “Stop”, and “Reset” buttons to the CCP to capture the segment of the call recording to be used as the Telephonic signature.

2.6.2 Call Control Panel Mockup

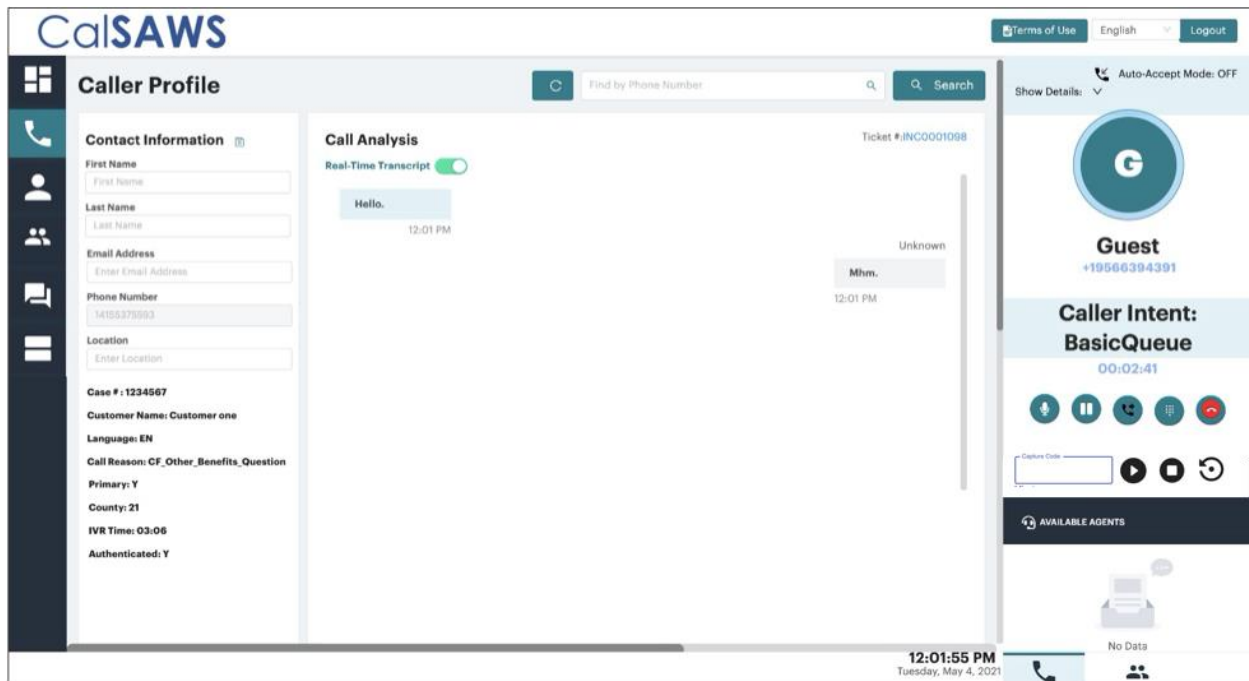


Figure 2.6.2.1 Call Control Panel Call in Progress

2.6.1 Description of Changes

1. Add a Capture Code input field. This input field will:
 - a. Only allow numeric (0-9) characters to be entered
 - b. Only allow a maximum of 8 characters to be entered
2. Add a Start recording button. This button will:
 - a. Enable once an 8-digit capture code has been entered into the capture code input field
 - b. Update to a recording icon after pressed
 - c. Save the capture code
 - d. Save the time stamp of when the Start recording button was pressed
 - e. Save the Contact ID of the current call
3. Add a Stop recording button. This button will:

- a. Revert the Start button back to its original icon
 - b. Enable once the Start recording button has been pressed
 - c. Save the time stamp of when the Stop recording button was pressed
4. Add a Reset recording button. This button will:
 - a. Enable after the Start recording button has been pressed
 - b. Save the Start recording time stamp to the time that the reset button was pressed

2.6.2 Page Location

- **Global: Admin Tools**
- **Local: Office Admin**
- **Task: Call Control Panel**

2.6.3 Security Updates

N/A

2.6.4 Page Mapping

N/A

2.6.5 Page Usage/Data Volume Impacts

N/A

2.7 Task API – Create Task

2.7.1 Overview

The Task API allows external applications to create tasks in CalSAWS. The API does not have any data element through which a specific Telephonic Signature recording can be referenced.

Add a data element to the Task API to hold a reference to a specific Telephonic Signature recording.

2.7.2 Description of Changes

1. Add a Capture Code field to the Task API on the POST and GET endpoints to hold a Capture Code (see attached YAML & HTML files). The Capture Code sent in the request must be associated to the Case that is also sent in the request.

2. Allow a Capture Code to be passed and stored when creating a task.

2.8 Task Detail page

2.8.1 Overview

The Task Detail page allows users to view and edit Tasks. Currently there is no Task Type "Telephonic Signature Quality" or "Telephonic Signature Not Complete" and no link added on the page for Tasks of this Type.

Add a Task Type "Telephonic Signature Quality" and "Telephonic Signature Not Complete". Add a link on the Task Detail page, when the Task Type is Telephonic Signature Quality or Telephonic Signature Not Complete, that will navigate to the Electronic Signature page for the associated Case and documents.

2.8.2 Task Detail page Mockup

Task Detail

* - Indicates required fields

Case Number 14022B1	Case Name: Gerald Tester	Program(s):* CalFresh - Gerald Tester	Status:* Assigned	Reference Number: [New Icon]
Category:* CSC	Type: Telephonic Signature Quality	Sub-Type:	Priority: High	Expedited: No
Due Date:* 03/03/2022	Date Created: 02/24/2022	Worker Assigned Date: 02/24/2022	Automated Action: No	
Assign to Program Worker: No	Worker ID: 19LS000V00	Bank ID:		

Long Description:
The Telephonic Signature does not meet quality standards for Case 14022B1 on 02/24/2022 12:21:59 PM for one or more documents including the SAR 7. Please re-try or request a signature using another Signature Method.

Instructions

Task History

Created On 10/13/2021 5:35:05 PM By: 1000708
Last Updated On 10/13/2021 5:35:05 PM By: 1000708

This Type_1 page took 2.60 seconds to load.

Figure 2.8.2.1 - Task Detail page with New Icon

2.8.3 Description of Changes

1. Create a System Task Type for each of the 58 counties that will be created when a recording does not meet quality standards. The Task Type will have the following elements:
 - a. Name: Telephonic Signature Quality
 - b. Category: CSC

- c. Priority: High
- d. Available Online: No
- e. Available for Automation: No
- f. Expire Tasks: Yes
- g. Expiration Period: 30 calendar days
- h. Expiration Type: After Task Creation
- i. Newly Assigned Indicator: 5 calendar days
- j. The Long Description of the Task will be formatted as: "The Telephonic Signature does not meet quality standards for Case {case number} on {date} {time} for one or more documents including the {document_1_number}. Please re-try or request a signature using another Signature Method."

Note: This Task Type is considered a "System Task" and will not be editable on the Task Type Detail page.

2. Create a System Task Type for each of the 58 counties that will be created when a customer fails to record their Telephonic Signature. The Task Type will have the following elements:
 - a. Name: Telephonic Signature Not Complete
 - b. Category: CSC
 - c. Priority: High
 - d. Available Online: No
 - e. Available for Automation: No
 - f. Expire Tasks: Yes
 - g. Expiration Period: 30 days
 - h. Expiration Type: After Task Creation
 - i. Newly Assigned Indicator: 5 days
 - j. The Long Description of the Task will be formatted as: "The requested Telephonic Signature was not completed for Case {case number} on {date} {time} for one or more documents including the {document_1_number}. Please re-try or request a signature using another Signature Method."

Note: This Task Type is considered a "System Task" and will not be editable on the Task Type Detail page.

3. Update the Task Detail page to display a link to the Electronic Signature page, for the associated Case and document(s), when the Task Type is Telephonic Signature Quality, or Telephonic Signature Not Complete:
 - a. Add a Signature icon (see the section titled Supporting Documents) linking to the Electronic Signature page for the Case and the document(s) that are associated to the Task via Capture Code, to the right of the 'Reference Number' field label
 - b. Protect this link with the ElectronicSignatureEdit security rights; hide the link if the user does not have these security rights

2.8.4 Page Location

- Access this page via the 'Tasks' link on the Utility Navigation Bar.

2.8.5 Security Updates

N/A




2.8.6 Page Mapping

N/A

2.8.7 Page Usage/Data Volume Impacts

N/A

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	Tracks Forms that will have Telephonic Signature functionality enabled with this SCR's release.	 CA-226838 Forms for Telephonic Signa
2	Tasks	Signature icon that will link to the Electronic Signature page	
3	IVR Application	Call Flow for the Telephonic Signature Application	 CA-226838 - Telephonic Signature

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met
DDID 2211	The CONTRACTOR shall configure the Telephonic Signature solution to allow designated County staff to update a transcript of attestations and fill out metadata fields while they are recording the telephonic signature of a customer. The solution will analyze the transcript for quality standards and generate a task for recordings that do not meet quality standards with a link to the telephonic signature recording.		Options chosen on the Electronic Signature page will be saved and associated to the Telephonic Signature as metadata. The same page will allow users to update the transcript of the Telephonic Signature call; users may also edit the transcript on the Electronic Signature Document Detail page. Only users with appropriate security rights will be able to access these features.
DDID 2217	The CONTRACTOR shall configure the Telephonic Signature solution to interface with the CalSAWS Software to retrieve relevant case and customer data to associate with the digital signature file as metadata in the recording repository.		The Telephonic Signature Call API sends a Capture Code to the IVR application and the IVR application is configured to retrieve and edit the related customer data in the CalSAWS database associating the Telephonic Signature audio to the Capture Code
DDID 2218	The CONTRACTOR shall configure the Telephonic Signature solution to create an auto-journal when a telephonic signature has been captured and interface with the CalSAWS Task Management solution to create a task.		The IVR application uses the Journal API to Create CalSAWS application journal entries. The IVR application uses the Task API to create CalSAWS application Tasks, when a Telephonic Signature does not meet quality standards.

DDID 2220	The CONTRACTOR shall configure the Customer Service Center and Telephonic Signature solutions to allow Customer Service Center agents to press a button in the CalSAWS Application or the Call Control Panel to indicate the start of a telephonic signature and again to indicate the end. The recording is stored as an individual file and associated with the case and specific forms that were signed. This recording can be accessed, listened to, and downloaded from the case in the CalSAWS Application.		The IVR application has 'Start' and 'Stop' buttons to designate a portion of call audio as a "Telephonic Signature". The IVR application stores the audio and is configured to accept a Capture Code used to associate the Telephonic Signature with the Case and specific forms. In CalSAWS, the Electronic Signature page and the Electronic Signature Document Detail page allow users, with the appropriate security rights, to listen to and download the Telephonic Signature audio.
DDID 2729	The CONTRACTOR shall configure the Telephonic Signature solution to allow designated County staff to select a single generated document or multiple documents to associate the signature to.		The Electronic Signature page has an 'Add Document' button which accesses the new 'Distributed Documents Select' page where multiple documents may be selected.
DDID 2730	The CONTRACTOR shall configure the Telephonic Signature solution to call the Non-Customer Service Center worker after entering their phone number into CalSAWS, and extension if applicable.		The Electronic Signature page allows users to enter their phone number and extension then press a 'Call' button which uses the Telephonic Signature Call API to request an outbound call from the IVR application.

DDID 2731	The CONTRACTOR shall configure the Telephonic Signature solution to support 4-way calling. This allows the agent, customer, Language Line interpreter and Telephonic Signature solution to be connected concurrently.		
DDID 2046	<p>The CONTRACTOR shall configure the ability to play a pre-recorded message of the Rights and Responsibilities based on the documents the customer will be signing. The forms which require Rights and Responsibilities include redetermination, recertification, and application. The following languages will be supported through this functionality:</p> <ul style="list-style-type: none"> - English - Spanish - Farsi - Vietnamese - Mandarin - Armenian - Tagalog - Russian - Korean - Cambodian - Hmong - Cantonese - Arabic - Lao 		The IVR application is configured to play audio in the required languages based on document(s) and the person's spoken language.
DDID 2732	<p>The CONTRACTOR shall update the existing CalSAWS Electronic Signature solution to incorporate the new Telephonic Signature solution. All parts of the Electronic Signature solution will remain as is, and in addition, will include Telephonic Signature. This includes:</p> <ul style="list-style-type: none"> - Page - Security - Navigation 		"Telephonic" was added as an additional Signature Method on the existing Electronic Signature page; security for and navigation to the Electronic Signature page remain unchanged. The same security rights protecting edits on the Electronic Signature page also now protect edits to the transcript of the

			Telephonic Signature audio, on the Electronic Signature Document Detail page.
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5 APPENDIX

N/A