

CalSAWS | Notes from IVR/Contact Center Committee Meeting

Date: October 27, 2021	Notes Location: Microsoft Teams	
Time: 9:00 am – 12:00 pm	Meeting Called by: Darcy Alexander	
Attendees:	R1 <input type="checkbox"/> Karen Elizondo	R4 <input checked="" type="checkbox"/> Mark McAlister
	R1 <input checked="" type="checkbox"/> Rachel Gomez	R5 <input checked="" type="checkbox"/> Alma Franco
	R1 <input type="checkbox"/> Martin Lara	R5 <input checked="" type="checkbox"/> Cori Robertson
	R1 <input checked="" type="checkbox"/> Nancy Rodriguez	R5 <input checked="" type="checkbox"/> Corrinne Simpson
	R1 <input checked="" type="checkbox"/> Monica Castillo	R5 <input checked="" type="checkbox"/> Nina Olivas
	R1 <input checked="" type="checkbox"/> Norma Fetters	R5 <input checked="" type="checkbox"/> Jason Garrett
	R2 <input type="checkbox"/> Cathy Collins	R6 <input checked="" type="checkbox"/> Andy Nguyen
	R2 <input checked="" type="checkbox"/> Shawna Reed	R6 <input checked="" type="checkbox"/> Maria Montoya
	R2 <input checked="" type="checkbox"/> Chris Craig	R6 <input checked="" type="checkbox"/> Karina Estrada
	R2 <input checked="" type="checkbox"/> Ilda Torrez	R6 <input type="checkbox"/> Narine Torvartanyan
	R2 <input checked="" type="checkbox"/> Stacy Bruemmer	R6 <input type="checkbox"/> Jason Reyes
	R3 <input checked="" type="checkbox"/> Danielle Smith	CS <input type="checkbox"/> Jared Kuester
	R3 <input type="checkbox"/> Julie Evinger	CS <input type="checkbox"/> Stacey Xiong
	R3 <input checked="" type="checkbox"/> Joshua Charlton	CS <input type="checkbox"/> Logan Pratt
	R4 <input checked="" type="checkbox"/> David Mata	CS <input type="checkbox"/> Danielle Benoit
	R4 <input checked="" type="checkbox"/> Alfredo Jimenez	CS <input type="checkbox"/> Gerald Limbrick
	R4 <input checked="" type="checkbox"/> Dwight Bristow	CS <input type="checkbox"/> Matt Lower
	R4 <input checked="" type="checkbox"/> Puninder (Roni) Dhillon	CS <input type="checkbox"/> John Dray
		CS <input type="checkbox"/> Charles Heo
		CS <input type="checkbox"/> Rhiannon Chin
		CS <input type="checkbox"/> Erick Arreola
		CS <input type="checkbox"/> Kimberly Sinclair
		CS <input type="checkbox"/> Don Coffey
		CS <input type="checkbox"/> Carlos Cuenca
		CS <input type="checkbox"/> Julie Conwell –
		RM Sponsor
		CS <input type="checkbox"/> CDSS

Notes Taken By: Region # 6 Responsible for Meeting Notes – Los Angeles - Maria Montoya

Agenda Topic:	Important Points
Welcome/New Members: Nina Olivas – Region 5 Karen Elizondo – Region 1	<ul style="list-style-type: none"> Introduction done for new members
Meeting Notes: <ul style="list-style-type: none"> Region 6 Identified as the one responsible for taking notes. 	<ul style="list-style-type: none"> Region #6– Notes are due to the Contact Center Facilitator on November 3, 2021.
<ul style="list-style-type: none"> SCR CA-226839 – External Party Access Follow-up 	<ul style="list-style-type: none"> Contact Center Team Project is still working on updates to the design and will present to Committee at next meeting with updated information.
<ul style="list-style-type: none"> SCR CA-226838 – Telephonic Signature: 	<ul style="list-style-type: none"> Contact Center Team Signature meets requirement per program regulations. Forms are generated from CalSAWS first to complete signature.



- Q- Is there a retention policy for recording? Yes, 7 years.
- Q- are signatures date stamped to differentiate from each year's signatures? Yes, and it is assigned to the specific form that was signed, i.e., SAR 7.
- Q- Will these recordings be stored withing CalSAWS or will they be required to be downloaded and stored at county level? It will be recorded in CalSAWS.
- Q- Is there a reason that there are only boxes by some documents? Not all documents will have eSign option, full list will be provided.
- Q- Is there any reporting for signatures? Would need to be Adhoc
- Q- Received means recording complete and accepted? Yes
- Q- What happens if customer disconnects, and signature is not complete? May show incomplete, and task will be generated.
- Q- If it fails, can system call customer back for the agent? Yes, can have system make 3 attempts. Task would then be generated.
- Q- if staff make an edit on the transcript, can the edit be tracked? Taking it back
- Q- For ICTs will signature also be available to the new county? Taking it back
- Q- When will the signature update to received? If call button is used, once call is disconnected and saved, would take approximately 5min. For contact center agents, once call is completed/disconnected, update would take a couple of minutes (during agent's wrap-up status).
- Q- Will the R&R be located with CalSAWS? Will be added with auto selected to yes, workers would have option to deselect. Document will be sent for votes.
- Q- if customer is outside the threshold languages, can we use translator? Yes
- Q- If staff don't check box for R&R, can you still process case? Can case fail for R&R not

Agenda Topic:

Important Points

completed? Yes, case can be processed.
However, for QA purposes, it may be cited.

- Q- Does R&R apply to WTW? Yes
- Q- will auto journal be added when signature is/not captured and be specific per form? Yes
- Project to take back all of the input given from the Counties and will present an updated version at the next Committee Meeting.

#	Action Item	Assigned To	Assigned Date	Due Date	Status
1					
2					

Next Scheduled Meeting – Teams – November 17, 2021 9:00 AM – 12:00 PM:

Region 1 will be responsible for meeting notes.

Proposed Monthly Meeting Schedule:

Meeting Date	Meeting Time	Cancelled/Scheduled
October 27, 2021	9:00 AM – 12:00 PM	Scheduled
November 17, 2021	9:00 AM – 12:00 PM	Scheduled
December 15, 2021	9:00 AM – 12:00 PM	Scheduled

Note: Additional Meeting dates and times may be required.

