

# CalSAWS

California Statewide Automated Welfare System

## **Design Document**

CA-226839

External Party Access IVR

<b>CalSAWS</b>	<b>DOCUMENT APPROVAL HISTORY</b>	
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# 1 OVERVIEW

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The Interactive Voice Response (IVR) PIN is used to authenticate a person in the IVR system. IVR allows Organizations/Resources to interact with callers through a series of automated menus and enabling the customer to self-serve for faster resolution. Through IVR flow, the customer may choose to record their voices for future authentication. This voice authentication can be used instead of a password, or Personal Identification Number (PIN).

## 1.1 Current Design

In the CalSAWS, only the Case Person has access to Interactive Voice Response (IVR) and they can call in using their voice as a password or the Personal Identification Number (PIN). Therefore, IVR PIN is only being displayed in 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 Resource Detail page, Foster Care Resource Detail page, and Money Management Resource Detail page.

Add the new PIN Letter for External Party Access.

Create call flow in Amazon Connect platform for 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.

## 1.3 Overview of Recommendations

1. Modify Resource Detail page, Foster Care Resource Detail page and Money Management Resource Detail page to add 'IVR PIN' field and a 'Reset PIN' button next to it.
2. Add 'IVR PIN Access' field and a checkbox to the Approved for County Use List page.
3. Add the new CSF 181 – PIN Letter for External Party Access to CalSAWS.
  - a. A new form/Noa header will be implemented to be used for the CSF 181.
4. 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 CCP Screen pop.
4. All counties will have one common phone number for External party to call into the IVR.
5. Each county will have separate queues for calls transferred from EPA.
6. EPA will only support English language.
7. EPA calls will be prioritized over regular IVR calls to the county; prioritization will be added at the contact flow level.

## 2 RECOMMENDATIONS

### 2.1 Resource Detail

#### 2.1.1 Overview

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

#### 2.1.2 Resource Detail Page – Mockups

**Resource Detail**

\*- Indicates required fields

Save Cancel

**Basic Information**

ID: 940000011

Status: \* Active

IVR PIN: Create PIN

Name: \* CENTER FOR COMMUNITY AND FAMILY SERVICES

Payee Name: \* CENTER FOR COMMUNITY AND FAMILY SERVICES

eCAPS Vendor Number:

**Resource Access**

Active Directory Id	Name
No data found	

Add

Figure 2.1.2-1 – Resource Detail Page-Create PIN

**Resource Detail**  
\*- Indicates required fields

Save Cancel

**Basic Information**

ID: 940000011      Status: \* Active      IVR PIN: Reset PIN

Name: \* CENTER FOR COMMUNITY AND FAMILY SERVICES      Payee Name: \* CENTER FOR COMMUNITY AND FAMILY SERVICES      IVR PIN Updated On: 04/17/2020 03:39:17 PM

eCAPS Vendor Number:

**Resource Access**

Active Directory Id	Name
No data found	

Add

**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 case 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 user clicks on 'Create PIN' button and saves the record, a random 6-digit unique 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 set of 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. IVR PIN number will not be displayed in the Resource Detail page.
5. Add the 'IVR PIN Updated On' field in the Resource Detail page as displayed in the figure 2.1.2.-2.
  - a. This field will be dynamic and displayed once the IVR PIN is created.
  - b. This field will display the date and time the IVR PIN was updated, formatted as <DD/MM/YYYY HH:MM: SS AM/PM>.



### 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

### 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 Foster Care Resource Detail page. The top navigation bar includes 'Resource Databank' and various utility icons. The sidebar on the left lists navigation options, with 'Foster Care Resource Information' selected. The main content area is titled 'Foster Care Resource Detail' and contains a form with the following fields and controls:

- ID:** 2899353754
- Vendor Type:** Business (dropdown menu)
- CWS/CMS Vendor Number:** 566398
- IVR PIN:** (field with a 'Create PIN' button next to it)
- Resource Name:** \* Extraordinary Families (text input)
- Payee Name:** \* Extraordinary Families (text input)
- Category:** \* Foster Care (text input)
- Secondary Payee:** (text input)
- eCAPS Vendor Number:** (text input)
- Previous Name:** (text input)
- Use Between Payees:** (dropdown menu)

Buttons for 'Save' and 'Cancel' are located at the top right of the form area.

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 top navigation bar includes the CalSAWS logo, user information (Resource Name: Extraordinary Families, Resource Number: 2899353754), and various utility icons (Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, Log Out). The main navigation bar includes 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 contains a navigation menu with the following items: Foster Care, Foster Care Resource Search, Foster Care Resource Information (selected), Vendor Information, Approved for County Use, License Information, Foster Care Facility Ratios, County Impact List, FFA Certified Homes, Resource Placements, and Notification List.

The main content area is titled "Foster Care Resource Detail" and includes a "Save" and "Cancel" button. A legend indicates that "\*" denotes required fields. The "Basic Information" section contains the following fields:

- ID:** 2899353754
- Vendor Type:** Business (dropdown menu)
- CWS/CMS Vendor Number:** 566398
- IVR PIN:** [Field with "Reset PIN" button]
- Resource Name:** \* Extraordinary Families
- Payee Name:** \* Extraordinary Families
- IVR PIN Updated On:** 04/17/2020 03:39:17 PM
- Category:** \* Foster Care
- Secondary Payee:** [Field]
- eCAPS Vendor Number:** [Field]
- Previous Name:** [Field]
- Use Between Payees:** [Dropdown menu]

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

### 2.2.3 Description of Change

1. Add 'IVR PIN' field to Foster Care Resource Detail page.
2. Add a 'Create PIN' button beneath the 'IVR PIN' field.
  - a. When a new Foster Care case 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 user clicks on 'Create PIN' button and saves the record, a random 6-digit unique 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 set of 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. IVR PIN number will not be displayed in the Foster Care Resource Detail page.
5. Add the 'IVR PIN Updated On' field in the Foster Care Resource Detail page as displayed in the figure 2.2.2.-2.
  - a. This field will be dynamic and displayed once the IVR PIN is created.
  - b. This field will display the date and time the IVR PIN was updated, formatted as <DD/MM/YYYY HH:MM: SS AM/PM>.

### 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

### 2.3.1 Overview

Modify 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, user information (Resource Name: A & J Social Services, Resource Number: 2899324899), and various utility icons (Journal, Tasks, Help, Resources, Page Mapping, Images, DCFS Images, 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), Money Management 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 features a 'Save' and 'Cancel' button. A legend indicates that an asterisk (\*) denotes required fields. The 'Basic Information' section contains the following fields: ID (2899324899), IVR PIN (with a 'Create PIN' button), Name (A & J Social Services, LLC), Payee Name (A & J Social Services, LLC), Category (Money Management), and Type (Other). The eCAPS Vendor Number field is also present but empty.

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 top navigation bar includes 'Los Angeles STG1', 'Case Info', 'Eligibility', 'Empl. Services', 'Child Care', 'Resource Databank', 'Fiscal', 'Special Units', 'Reports', 'Client Corresp.', and 'Admin Tools'. The left sidebar lists navigation options: 'Money Management', 'Resource Search', 'Vendor Information', 'Approved for County Use', 'County Impact List', and 'Notification List'. The main content area is titled 'Money Management Resource Detail' and includes a 'Save' and 'Cancel' button. Below this is a 'Basic Information' section with the following fields:

<b>ID:</b> 2899324899	<b>IVR PIN:</b> <input type="button" value="Reset PIN"/>	<b>IVR PIN Updated On:</b> 04/17/2020 03:39:17 PM
<b>Name: *</b> <input type="text" value="A &amp; J Social Services, LLC"/>	<b>Payee Name: *</b> <input type="text" value="A &amp; J Social Services, LLC"/>	
<b>Category: *</b> Money Management	<b>Type: *</b> Other	
<b>eCAPS Vendor Number:</b>		

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

### 2.3.3 Description of Change

1. Add 'IVR PIN' field to Money Management Resource Detail page.
2. Add a 'Create PIN' button beneath the 'IVR PIN' field.
  - a. When a new case 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 unique 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 'Reset PIN' button will reset the previously generated IVR pin with a new set of 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. IVR PIN number will not be displayed in the Money Management Resource Detail page.
5. Add the 'IVR PIN Updated On' field in the Money Management Resource Detail page as displayed in the figure 2.3.2.-2.
  - a. This field will be dynamic and displayed once the IVR PIN is created.
  - b. This field will display the date and time the IVR PIN was updated, formatted as <DD/MM/YYYY HH:MM: SS AM/PM>.

### 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 Approved for County Use List

### 2.4.1 Overview

The Approved for County Use List page allows the User to add, edit and view a Resource's approval status. This page maintains a historical record of statuses for a Resource. This change will add the 'IVR PIN Access' field to the page to maintain IVR pin access for the resources.

### 2.4.2 Approved for County Use List – Mockup

**Approved for County Use List**

\* - Indicates required fields

Save Cancel

Approved	Comments	Date	User
No Data Found			

**Change Approval for Resource to**

Approved: \*  IVR PIN Access: Date: 11/01/2021

Yes

Comments:

Save Cancel

**Figure 2.4.2-1 – Approved for County Use List Page**

### 2.4.3 Description of Chang

1. Add 'IVR PIN Access' field and a checkbox to the Approved for County Use List page.
  - a. If a county opts-in and the checkbox is selected in the Approved for County Use List page, then the resource belongs to the county will have the access to the IVR PIN.

Note: If a county opts-out and the checkbox is not selected in the Approved for County Use List page, then the resource belongs to the county will not have the access to the IVR PIN.

### 2.4.4 Page Locations

- **Global:** Resource Databank
- **Local:** Resources
- **Task:** Approved for County Use

### 2.4.5 Security Update

N/A

### 2.4.6 Page Mappings

Update page mapping for the new field.

### 2.4.7 Page Usage/Data Volume Impacts

N/A

## 2.5 External Party Access IVR

### 2.5.1 Overview

External Party calls a specific phone number, then enters a PIN to authenticate. Once authenticated the call is routed to the destination county agent for further assistance.

### 2.5.2 Description of Changes

Implement External party access IVR call flow in AWS connect. Add authentication PIN management in CalSAWS application.

When an external party calls the phone number, the caller is prompted to enter a PIN to authenticate. When the caller authenticates, the caller is prompted to enter or say the county name or the two-digit county code of the case they are calling about. After the caller enters the county code, the call is then transferred to the destination county.

External party calls will also have a route to callers who are unable to authenticate in the IVR. The caller will still be prompted to enter or say the county name or the two-digit county code. After the caller enters the county code, the call is then transferred to the destination county.

The county must have dedicated queues to service External party calls. Routing profiles are created for such queues and agents are assigned to the routing profiles to service both authenticated and unauthenticated external party calls. County to configure separate routing profiles for External Party calls.

For Non-CSC counties, the IVR phone number will be played back to the external party.

## **2.6 IVR Authentication Sweep**

### **2.6.1 Overview**

### **2.6.2 Description of Change**

Update IVR\_LOGIN\_AGGR table to include a reference to the CalSAWS table that stores the authorized representative.

Update batch job PB00V500 to include primary key id for the table that stores the authorized representative which IVR will consume.

### **2.6.3 Execution Frequency**

### **2.6.4 Key Scheduling Dependencies**

### **2.6.5 Counties Impacted**

All Counties

## 2.6.6 Data Volume/Performance

## 2.6.7 Failure Procedure/Operational Instructions

Batch Support Operations staff will evaluate transmission errors and failures and determine the appropriate resolution (i.e., manually retrieving the file from the directory and contacting the external partner if there is an account or password issue, etc...)

## 2.7 Adding New CSF 181 – New Case IVR PIN Letter for External Party Access Form Recommendation

### 2.7.1 Overview

The CSF 181 – New Case 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

### 2.7.2 Form Verbiage

#### Create Form XDP

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

**Form Header:** New header from section 2.7.

**Form Title (Document List Page Displayed Name):** New Case 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



### 2.7.3 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  COUNTY_CODE from ADDR table. <b>Technical Note:</b> 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 Case 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	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

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.  PIN_NUM_IDENTIF from IVR_PERS table.	Arial Font Size 10	Yes/Numeric Field	No	Yes
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**Note:** PIN Number 1 and PIN Number 2 are the same PINs.

## 2.7.4 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

## **2.8 Adding New NOA Date Only Header Fragment Recommendation**

### **2.8.1 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

## 2.8.2 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:

COUNTY OF \_\_\_\_\_  
Date: \_\_\_\_\_

New Case IVR PIN Letter for  
External Party Access

## 2.8.3 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.	Visio diagram represents External Party Access call flow, AWS EPA IVR Detailed 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