

DDID	Topic	Requirement
2687	Admin Page	The CONTRACTOR shall configure the CalSAWS Application to have a Customer Service Center Administration Page. This page will have a separate security right associated to it. There is one level of security permissions to the administration page.
2688	Admin Page	<p>The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to roll on and roll off Customer Service Center workers and change the following fields of a Customer Service Center worker:</p> <ul style="list-style-type: none"> <li>- First Name</li> <li>- Last Name</li> <li>- County Email Address</li> <li>- Windows Login ID</li> <li>- Team</li> <li>- Role</li> </ul>
2689	Admin Page	The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to close and open due to an emergency.

2690 Admin Page	<p>The CONTRACTOR shall configure a call center administration page within CalSAWS to give call center staff members the ability to insert their own custom queue hold messages (messages that are played to the customer as they wait in a queue to speak with an agent) into the IVR to be played through text to speech. Messages have a 260-word limit which is about 120 seconds of audio and there is a maximum of 10 messages to be saved and played. The following languages will be supported through this functionality:</p> <ul style="list-style-type: none"> <li>- English</li> <li>- Spanish</li> <li>- Farsi</li> <li>- Vietnamese</li> <li>- Mandarin</li> <li>- Armenian</li> <li>- Tagalog</li> <li>- Russian</li> <li>- Korean</li> <li>- Cambodian</li> <li>- Hmong</li> <li>- Cantonese</li> <li>- Arabic</li> <li>- Lao</li> </ul>
2691 Admin Page	The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to change the hours that Courtesy Call Back is offered to the customer.
2692 Admin Page	The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to change the number of minutes a customer needs to wait in queue before Courtesy Call Back is offered to the customer.
2693 Admin Page	The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to adjust the limit on the number of calls allowed per queue at the Customer Service Center. Different queues can have different limits.
2694 Admin Page	The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center staff members the ability to control the amount of time an agent can be in the "After Call Work" state after ending a call before being automatically put back in to the "Ready" state to receive a new call.

2695 Admin Page

The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give staff members with the appropriate security the ability to insert a custom emergency message into the IVR to be played through text to speech. Messages have a 260-word limit which is about 120 seconds of audio and there is a maximum of 10 messages to be saved. Only one message can be enabled to play from the bank of saved messages at a time. The following languages will be supported through this functionality:

- English
- Spanish
- Farsi
- Vietnamese
- Mandarin
- Armenian
- Tagalog
- Russian
- Korean
- Cambodian
- Hmong
- Cantonese
- Arabic
- Lao

This message plays when the customer selects to speak to a worker during normal operating hours and the Customer Service Center is closed.

2696 Admin Page

The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give staff members with the appropriate security the ability to insert a custom informational message into the IVR to be played through text to speech. Messages have a 260-word limit which is about 120 seconds of audio and there is a maximum of 10 messages to be saved. Only one message can be enabled to play from the bank of saved messages at a time. The following languages will be supported through this functionality:

- English
- Spanish
- Farsi
- Vietnamese
- Mandarin
- Armenian
- Tagalog
- Russian
- Korean
- Cambodian
- Hmong
- Cantonese
- Arabic
- Lao

This message plays after language selection in the IVR.

2222 Admin Page

Supervisor Email  
Notification

The CONTRACTOR shall configure the Customer Service Center solution to allow supervisors to configure triggers which send them an email notification when certain supervisor-specified conditions (e.g., ten calls waiting) are met. Supervisor-specified conditions are as follows:

- Number of calls waiting in queue
- Longest wait time for a call in a queue
- After Call Work state time limit for an agent
- Number of agents available to take calls
- Agent Rolled Over Not Ready (RONA) state

This is County configurable through the administration page.

2697 Existing Functionality- Amazon Console	<p>The CONTRACTOR shall configure the Customer Service Center solution to allow County designated staff Amazon Console access for the following:</p> <ul style="list-style-type: none"> <li>- Configure routing profiles for their agents</li> <li>- View Amazon Connect's real time and historical agent and queue reports</li> <li>- Configure Quick Connects</li> </ul>
2698 Existing Functionality- Call Recording	The CONTRACTOR shall configure the Customer Service Center solution to include recording 100% of the call audio and 25% of the agent desktop screens. The retention period for these recordings will be 90 days. The CONTRACTOR shall configure an API for Counties to export their audio recordings prior to the 90-day expiration.
2699 Existing Functionality- Call Routing	The CONTRACTOR shall configure the Customer Service Center solution to route calls to workers based on language and program selected by the customer <b>in the IVR</b> .
2210 Existing Functionality- Call Routing	The CONTRACTOR shall configure the Customer Service Center solution to utilize call routing to queue calls to agents specifically by language and program.
2700 Existing Functionality- CCP	The CONTRACTOR shall configure the Customer Service Center solution to include a Message of the Day functionality which allows County designated staff to send global messages to all staff's CCP.
2701 Existing Functionality- Features	The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow a customer to enroll and capture their voice print for voice authentication.
2702 Existing Functionality- Features	The CONTRACTOR shall configure the Customer Service Center solution to allow a customer to select a Courtesy Callback. Courtesy Callback is offered if the queue is over a certain threshold which is set by the County on the administration page.
2703 Existing Functionality- Features	The CONTRACTOR shall configure the Customer Service Center solution to provide customers an option to communicate with a case worker using web chat functionality that is initiated from the Statewide Portal. Counties will have the option to opt in or out of this functionality.
2704 Existing Functionality- Features	The CONTRACTOR shall configure the Customer Service Center solution to offer a post call survey at the end of the call to gather customer feedback. Counties will have the option to opt in or out of this functionality. The post call survey can have a minimum of 1 and a maximum of 5 questions. Questions will be in the "yes/no", or "rate on a scale" format to allow the customer to input only numbers as their answer.

2705 Existing  
Functionality-  
IVR

The CONTRACTOR shall configure the CalSAWS inbound IVR to have a customized call flow for each county including the following:

- prompts
- menus
- queues
- program selection
- call transfers

All flows include all self-service features.

The following languages will be supported in the CalSAWS inbound IVR:

- English
- Spanish
- Farsi
- Vietnamese
- Mandarin
- Armenian
- Tagalog
- Russian
- Korean
- Cambodian
- Hmong
- Cantonese
- Arabic
- Lao

2706 Existing  
Functionality-  
IVR/ Self Service

The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to authenticate themselves in the IVR using one of the following options:

- Social Security Number and date of birth
- case number and PIN
- voice print authentication

2707 Existing Functionality- IVR/ Self Service	<p>The CONTRACTOR shall configure the CalSAWS Inbound IVR to include a self service program menu to give customers the ability to receive benefit amounts for the following programs:</p> <ul style="list-style-type: none"> <li>- CalWORKS</li> <li>- CalFresh</li> <li>- Welfare to Work</li> </ul> <p>The CONTRACTOR shall configure the self service program menu to give customers the ability to receive active or inactive status for Medi-Cal.</p>
2708 Existing Functionality- IVR/ Self Service	<p>The CONTRACTOR shall configure the CalSAWS Inbound IVR self service information for the CalWORKS and CalFresh programs as stated below:</p> <ul style="list-style-type: none"> <li>- Program Status</li> <li>- Total Amount received for this month</li> <li>- If benefits are on hold, the system will notify the customer</li> <li>- If benefits are not on hold, the customer will be notified for what they are eligible to receive in the upcoming month.</li> </ul>
2709 Existing Functionality- IVR/ Self Service	<p>The CONTRACTOR shall configure the CalSAWS Inbound IVR self service information for the Medi-Cal program as stated below:</p> <ul style="list-style-type: none"> <li>- Medi-Cal Program Type</li> <li>- Status</li> <li>- Share of Cost</li> <li>- <b>Medi-Cal Service Benefit</b></li> </ul>
2710 Existing Functionality- IVR/ Self Service	<p>The CONTRACTOR shall configure the CalSAWS Inbound IVR self service information for the Welfare-to-Work (WTW) programs as stated below:</p> <ul style="list-style-type: none"> <li>- Upcoming Activities</li> <li>- WTW Reimbursement Amount</li> <li>- <b>Sanction Status/Reason</b></li> </ul>
2711 Existing Functionality- IVR/ Self Service	<p>The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to select previously generated/sent forms to be mailed. The form list will be dynamically provided to the customer based on forms relevant to their case. The following forms can be re-sent:</p> <ul style="list-style-type: none"> <li>-Semi-annual report</li> <li>-Transitional Medi-Cal Status report</li> <li>-Passport to services form</li> </ul>

2712 Existing Functionality- IVR/ Self Service	<p>The CONTRACTOR shall configure <b>the CalSAWS Inbound IVR</b> to give the customer a dynamic set of options based on which forms are relevant to their case. They may select a form to get the status of the form based on the options available in this dynamic menu:</p> <ul style="list-style-type: none"> <li>- CalWORKs status report</li> <li>- CalWORKs or CalFresh Redetermination packet</li> <li>- CalFresh status report</li> <li>- CalFresh Redetermination packet</li> <li>- Transitional Medi-Cal status report</li> <li>- Medi-Cal Redetermination packet</li> </ul>
2713 Existing Functionality- IVR/ Self Service	The CONTRACTOR shall configure the CalSAWS Inbound IVR to give the customer the ability to change their IVR PIN. Changing the IVR PIN is real-time.
2714 Existing Functionality- IVR/ Self Service	The CONTRACTOR shall configure the CalSAWS Inbound IVR to give the customer the ability to request a new IVR PIN to be mailed to them.
2715 Existing Functionality- IVR/ Self Service	The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to enter their zipcode and request office hours and address.
2716 Existing Functionality- Outbound IVR Campaign	The CONTRACTOR shall configure the CalSAWS <b>Outbound</b> IVR solution to include document reminders for missing SAR7's in the outbound IVR Campaigns. Upon answering the call, the customer can request to have their SAR7 resent to them.
2717 Existing Functionality- Outbound IVR Campaign	The CONTRACTOR shall configure the <b>CalSAWS Outbound IVR</b> solution to have appointment reminders that include meeting with worker, group meeting, telephone interview, re-evaluation interview, telephone CW/CF Re-Evaluation Interview. The customer must have an appointment status that is "scheduled" or "rescheduled." Upon receiving the appointment reminder, the customer can confirm or cancel the appointment.
2218 Existing Functionality- Outbound IVR Campaign	The CONTRACTOR shall configure the Customer Service Center solution to allow counties to update the customers opt in and/or opt out status for the outbound IVR Campaigns through the CalSAWS Application.



2268 Existing Functionality- Outbound IVR Campaign	The CONTRACTOR shall configure the CalSAWS outbound IVR to display the phone number for that county's CalSAWS IVR on the caller ID of the outbound call to facilitate customers calling back.
2718 Existing Functionality- Outbound IVR Campaign	The CONTRACTOR shall configure the CalSAWS System to create a task when a customer cancels their appointment during a CalSAWS outbound IVR call.
2719 Existing Functionality- RCC	The CONTRACTOR shall configure the Covered California Inbound IVR for the Covered California Quick Sort Transfers to route calls to the appropriate county queues. The IVR will: <ul style="list-style-type: none"> <li>- Capture the tracker ID, county code, and language code</li> <li>- Offer Courtesy Callback</li> <li>- Have a voicemail option for transfers outside of regular hours of operation and holidays</li> </ul>
2720 Existing Functionality- RCC	The CONTRACTOR shall configure the Covered California Inbound IVR to automatically route calls between counties in the event the intended county is unavailable <b>due to the following reasons:</b> <ul style="list-style-type: none"> <li>- <b>Holiday</b></li> <li>- <b>Logged Out</b></li> <li>- <b>Close for Emergency</b></li> <li>- <b>Technical Issues</b></li> </ul>
2721 Existing Functionality- Remote Closure	The CONTRACTOR shall configure the Customer Service Center solution to allow Counties to call into a unique and specific phone number provided to the County and accessed through a PIN assigned to the County by CalSAWS to: <ul style="list-style-type: none"> <li>- Close their contact center remotely</li> <li>- Record an emergency and/or informational message to play in the IVR. The messages can be up to 120 seconds.</li> </ul>
2722 Existing Functionality- Reporting	The CONTRACTOR shall configure the Customer Service Center solution for Counties to access a County-specific database that only contains data that is available in Amazon Connect for reporting purposes.

2723 Existing Functionality-Reporting	<p>The CONTRACTOR shall configure the Customer Service Center solution to include up to 10 canned reports that meet the reporting needs for the Counties, which includes the following categories:</p> <ul style="list-style-type: none"> <li>- Agent Summary</li> <li>- Queue Summary</li> <li>- Contact Detail</li> <li>- Contact Routing Summary</li> <li>- Dialed Number Summary</li> <li>- Agent State Detail</li> <li>- Agent Offline Summary</li> <li>- Agent Realtime</li> <li>- Queue Realtime</li> </ul> <p>The CONTRACTOR shall configure these reports to be exportable via excel.</p>
2724 Existing Functionality-Reporting/WFM	The CONTRACTOR shall include a Work Force Management and reporting solution as part of the Customer Service Center solution.
2216 External Party Access	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.
2725 External Party Access	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.
2221 Foster Caregiver	Requirement Removed
2300 General	Requirement Removed
2726 General - Environments	<p>The CONTRACTOR shall provide the following Customer Service Center environments:</p> <ul style="list-style-type: none"> <li>- Assembly Test (2)</li> <li>- System Test (4)</li> <li>- User Acceptance Testing (1)</li> <li>- Training (1)</li> <li>- Staging (1)</li> <li>- Production (1)</li> </ul>

2727 General - Remote Work	The CONTRACTOR shall configure the Customer Service Center solution to include the ability for Customer Service Center staff members to work remotely.
2294 Migration	Requirement Removed
2293 Multi-Tenancy	Requirement Removed
2169/2291 Multi-Tenancy	<p>The CONTRACTOR shall provide operational configurability, multi-tenant access to Counties for additional support of functionality within CalSAWS. Multi-tenant access is defined in the following:</p> <p>The Counties will be responsible for the management of the following:</p> <ul style="list-style-type: none"> <li>- Work force management</li> <li>- Agent routing profiles</li> <li>- Use of the reporting solution</li> <li>- Resource roll-on/roll-off</li> <li>- Create/Delete/Edit Teams</li> </ul> <p>CalSAWS will be responsible for the management of the following:</p> <ul style="list-style-type: none"> <li>- IVR changes</li> <li>- Direct database access</li> <li>- IVR build</li> <li>- Adding/removing queues</li> </ul> <p>The Counties and CalSAWS will both have the ability to independently access the following:</p> <ul style="list-style-type: none"> <li>- Emergency closure</li> <li>- Queue hold messages</li> <li>- Office hour changes</li> <li>- Queue limits</li> <li>- After call work time limit</li> <li>- Informational messages</li> <li>- Emergency messages</li> <li>- Supervisor email notifications</li> <li>- Remote closure of the county Customer Service Center</li> <li>- Amazon Quick Connects</li> </ul>

2728 Outbound IVR Campaign	<p>The following languages will be supported in the CalSAWS Outbound IVR:</p> <ul style="list-style-type: none"> <li>- English</li> <li>- Spanish</li> <li>- Farsi</li> <li>- Vietnamese</li> <li>- Mandarin</li> <li>- Armenian</li> <li>- Tagalog</li> <li>- Russian</li> <li>- Korean</li> <li>- Cambodian</li> <li>- Hmong</li> <li>- Cantonese</li> <li>- Arabic</li> <li>- Lao</li> </ul>
2258 Reporting	<p>The CONTRACTOR shall configure the CalSAWS Application to include an Inbound/Outbound Call Report which provides the following information:</p> <ul style="list-style-type: none"> <li>- Date</li> <li>- Case Number</li> <li>- Case Name</li> <li>- Person Name</li> <li>- Language</li> <li>- Worker</li> <li>- Answered/ Unsuccessful</li> <li>- Type</li> </ul>
2292 Reporting	<p>The CONTRACTOR shall configure the Customer Service Center solution to give the county the ability to configure their own reports leveraging the Amazon Connect data that is available.</p>
2284 Scheduled Callback	<p>The CONTRACTOR shall configure the Customer Service Center solution to allow a customer to request a scheduled callback if calling outside of the counties configured hours of operation or if the max queue limit has been reached in the queue. This is County configurable through the administration page.</p>

2211 Telephonic Signature	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.
2217 Telephonic Signature	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.
2218 Telephonic Signature	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.
2220 Telephonic Signature	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.
2729 Telephonic Signature	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.
2730 Telephonic Signature	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.
2731 Telephonic Signature	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.

2046 Telephonic Signature	<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"> <li>- English</li> <li>- Spanish</li> <li>- Farsi</li> <li>- Vietnamese</li> <li>- Mandarin</li> <li>- Armenian</li> <li>- Tagalog</li> <li>- Russian</li> <li>- Korean</li> <li>- Cambodian</li> <li>- Hmong</li> <li>- Cantonese</li> <li>- Arabic</li> <li>- Lao</li> </ul>
2732 Telephonic Signature	<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"> <li>- Page</li> <li>- Security</li> <li>- Navigation</li> </ul>