CalSAWS

California Statewide Automated Welfare System

Design Document

CA-208670

Add Threshold Languages to SAR7/SAR2/Addendum packet and SAR2

CalSAWS	DOCUMENT APPROVAL HISTORY	
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	Reviewed By	P Madhan Kumar

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/20/2022	1.0	Initial Draft	Indira Ramasamy
07/18/2022	1.1	Content Revision 1 Add recommendation to turn on SAR 2 Batch Job in threshold languages.	Indira Ramasamy

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1 OVERVIEW

This effort will update the SAR 7/SAR2/SAR 7 Addendum packet for the 57 migration counties to include Threshold languages and update SAR 2 EN & SP form within the packet to the latest state version.

This change will also add the latest state SAR 2 (6/19) form version for all counties in available threshold languages in CalSAWS.

This effort will also update the SAR 7 Addendum form to match with the state version (4/13) and update the SAR 7 Packet for LA county to use the updated SAR 7 Addendum form.

1.1 Current Design

1. The SAR 7 /SAR 2/SAR 7 Addendum Packet and SAR 2 (3/15) form currently exist in English and Spanish in CalSAWS.
2. SAR 7Addendum (6/13) version and SAR 7 form (12/14) is currently available in CalSAWS in below mentioned languages.
   Languages Available: English, Spanish, Armenian, Chinese, Farsi, Korean, Russian, Tagalog, Vietnamese

1.2 Requests

1. Add SAR 2 form in all available threshold languages for all counties.
2. Update existing language and add new languages for SAR 7 Addendum form in Template Repository to match with state version 4/13.
3. Update SAR 7 Packet for LA County to utilize the updated SAR 7 Addendum form.
4. Update English and Spanish SAR 7/SAR 2/SAR 7 Addendum Packet to utilize the updated SAR 2 (6/19) form.
5. Add SAR 7/SAR 2/SAR 7 Addendum Packet in all available threshold languages for 57 migration counties.

1.3 Overview of Recommendations

1. Add SAR 2 form in all available threshold languages.
2. Update existing languages and add new languages SAR 7 Addendum form in all available languages to match with state version 4/13.
3. Update SAR 7 Packet for LA county in all available languages to utilize the updated SAR 7 Addendum form.
4. Update SAR 7/SAR 2/SAR 7 Addendum Packet in English and Spanish to utilize the updated SAR 2 (6/19) form and add the SAR 7/SAR 2/SAR 7 Addendum Packet in all available threshold languages.

1.4 Assumptions

1. Print options for threshold forms will remain the same as the print options for English and Spanish Packets.

2. There are no changes to the generation logic of these forms. All the triggers for the new threshold forms will be the same as the existing form.
3. All fields (blank or prepopulated) will be editable.
4. Supporting Documents section references attachments found on Jira.
5. SCR #CA-219921 will update the SAR 2 form in English and Spanish to match with the latest state version 6/19.

2 RECOMMENDATIONS

2.1 Add SAR 2 Form in Threshold Languages

2.1.1 Overview

Add the SAR 2 form with version 6/19 in the Template Repository in all available threshold languages.

State Form: SAR 2

Current Programs: CalFresh, CalWORKs

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: All Counties

Template Description: This form is used by the California Department of Health and Human Services to notify a customer of his/her responsibility to report changes in income.

Existing Languages: English, Spanish

Imaging Form Name: Reporting Changes For Cash Aid And CF

Imaging Document Type: Customer Reporting

2.1.2 Form Verbiage

Create SAR 2 XDP's for Threshold Languages
Create SAR 2 with 2 impressions in 6/19 version for all threshold languages.

Form Title: Reporting Changes for Cash Aid and CalFresh
Form Number: SAR 2
Form Header: CalSAWS Standard Header #1
Include NA Back 9: N
Threshold Languages: Arabic, Armenian, Cambodian, Chinese*, Farsi, Korean, Hmong, Lao, Russian, Tagalog, Vietnamese

*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.

Form Mockups/Examples: See Supporting Documents #1

2.1.3 Form Variable Population

Field Mappings: Use the same field mappings as the English and Spanish forms for existing population logic.

2.1.4 Form Generation Conditions

Generate the SAR 2 in threshold languages via Run EDBC when the following conditions apply:

- Case is Active CalFresh, CalWORKs, **and/or** RCA, with a Semi-Annual Reporting Type (SAR) or a Semi-Annual Reporting Annually (SARA), or Semi-Annual Non-Reporting (SARN) Reporting Type
  - A SAR 2 can be generated if a case is CalFresh only, CalWORKs only, or has both CalFresh and CalWORKs (or RCA)

AND

- At Intake EDBC where the program(s) has been Approved.
- Previous EDBC's Reporting Type was not SAR, SARA, or SARN.
- A successful Redetermination EDBC for the program(s) is being authorized.
- The CalFresh IRT Limit Amount has changed from the previous successful EDBC **OR** the CalWORKs IRT Limit Amount has changed from the previous successful EDBC

Update SAR 2 Form generation batch job to generate threshold languages
Update batch job (PB00R2003) to generate the SAR 2 form in newly added threshold languages.

Tech Note: Update CT942_ 250 (SAR 2)

Form Print/Mailing Options
Threshold forms will have the same Form Print/Mailing Options as their corresponding English/Spanish packets.

Print Options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Options:

Mailing Options	Option for SAR 2 Form
Mail-To (Recipient)	Applicant selected on the document parameters page.
Mailed From (Return)	Worker's Office Address

Mailing Options	Option for SAR 2 Form
Mail-back-to Address	N/A
Outgoing Envelope Type	Standard
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for SAR 2 Form
Post to Self-Service Portal	Y

2.2 Update and Add SAR 7 Addendum Form to match with state version

2.2.1 Overview

Update existing language and add new language for SAR 7 Addendum Form in Template Repository to match with the state version 4/13 CalSAWS.

State Form: SAR 7 Addendum

Current Programs: CalFresh, CalWORKs

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: All Counties

Template Description: This form is sent used to inform the participant about the instructions, examples and penalties for the SAR 7 Eligibility/Status Request.

Imaging Form Name: Instructions and Penalties SAR 7

Imaging Document Type: Customer Reporting

2.2.2 Form Verbiage

Update and Add SAR 7 Addendum XDP's

Update and add SAR 7 Addendum XDP's in available languages to match with the state version.

Turn Off SAR 7 Addendum Cambodian Form

Turn Off SAR 7 Addendum form in Cambodian Language since the latest version is not available in CDSS.

Form Title: Instructions and Penalties SAR 7 Eligibility/Status Report
Form Number: SAR 7 Addendum
Form Header: CalSAWS Standard Header #3
Include NA Back 9: N
Updated Languages: English, Spanish, Armenian, Chinese*, Korean, Russian, Tagalog, Vietnamese

*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.

Languages Added: Arabic, Farsi, Hmong and Lao
Form Mockups/Examples: See Supporting Documents #2

2.2.3 Form Variable Population

N/A

2.2.4 Form Generation Conditions

N/A

Form Print/Mailing Options
Form Print/Mailing Options will be same as old form.

Print Options:

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

Mailing Options:

Mailing Options	Option for SAR 7 Addendum Form
Mail-To (Recipient)	N/A
Mailed From (Return)	N/A
Mail-back-to Address	N/A
Outgoing Envelope Type	N/A
Return Envelope Type	N/A
Special Paper Stock	N/A
Mail Priority	N/A

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
N	N	Y

Additional Options:

Requirement	Option for SAR 7 Addendum Form
Post to Self-Service Portal	N

2.3 Update SAR 7 Packet for LA county to utilize the updated SAR 7 Addendum

2.3.1 Overview

Update SAR 7 Packet for LA County to utilize the updated SAR 7 Addendum form.

State Form: SAR 7

Current Programs: CalFresh, CalWORKs

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: N/A

Template Description: This form is sent semi-annually to gather information from participants and to determine their Eligibility Status.

Imaging Form Name: Instructions and Penalties SAR 7

Imaging Document Type: Customer Reporting

2.3.2 Form Verbiage

Update SAR 7 Packet XDP's

Update SAR 7 Packet XDP's to utilize the updated SAR 7 Addendum form with version (4/13). Update SAR 7 Cambodian Packet to utilize the English SAR 7 Addendum form.

Form Title: Eligibility Status Report
Form Number: SAR 7
Form Header: CalSAWS Standard Header #1
Include NA Back 9: N

Threshold Languages: English, Spanish, Armenian, Cambodian, Chinese*, Farsi, Korean, Russian, Tagalog, Vietnamese

*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.

Form Mockups/Examples: See Supporting Documents #3

2.3.3 Form Variable Population

N/A

2.3.4 Form Generation Conditions

N/A

<u>Form Print/Mailing Options</u>

Form Print/Mailing Options will be same as old form.

Print Options: N/A

Mailing Options:

Mailing Options	Option for SAR 7 Packet
Mail-To (Recipient)	When generated through the batch process, the Primary Applicant.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	BRM Address
Outgoing Envelope Type	Standard
Return Envelope Type	BRM
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

Additional Options:

Requirement	Option for SAR 7 Packet
Post to Self-Service Portal	N

2.4 Update EN & SP and Add SAR 7/SAR 2/SAR 7 Addendum Packet in Threshold Languages

2.4.1 Overview

This section will cover the requirements to Update the SAR 7 /SAR 2/SAR 7 Addendum packet used by the Migration Counties to utilize the updated SAR 2 (6/19) form and also adding the SAR 7/SAR 2/SAR 7 Addendum packet in available threshold languages.

State Form: SAR 7 Addendum/SAR 2/SAR 7

Current Programs: CalFresh, CalWORKs, RCA

Current Attached Forms: N/A

Current Forms Category: Forms

Current Template Repository Visibility: Migration Counties Only

Template Description: Used by Customers to report changes. This form is a combination of the SAR 7 and SAR 2 forms that is created by a batch process semi-annually for each case. The SAR 2 notifies Customers of their responsibility to report income. The SAR 7 requests Customer updates on a semi-annually basis. The combined form is centrally printed. Customers must complete and return the form.

Existing Languages: English, Spanish

Imaging Form Name: Eligibility Status Report Packet

Imaging Document Type: Customer Reporting

2.4.2 Form Verbiage

1. The SAR 7/SAR 2/SAR 7 Addendum will be updated to include the SAR 2 (6/19) in English and Spanish.

   Updated Languages: English, Spanish

2. **<u>Create SAR 7/SAR 2/SAR 7 Addendum XDP's for Threshold Languages</u>**
   Create SAR 7/SAR 2/SAR 7 Addendum Packet XDP with 6 impressions, 1st impression is SAR 7 Addendum, 2nd is Blank Page, 3rd and 4th is SAR 2, 5th and 6th is SAR 7.
   Update SAR 7/SAR 2/SAR 7 Addendum Cambodian Packet to utilize the English SAR 7 Addendum form.

   Form Header: CalSAWS Standard Header #1
   Include NA Back 9: No
   Threshold Languages: Armenian, Arabic, Cambodian, Chinese*, Farsi,

Tagalog/Filipino, Hmong, Korean, Lao, Russian, Vietnamese
*One translation is provided to support the three Chinese threshold languages: Cantonese, Chinese, and Mandarin.
Form Mockups/Examples: See Supporting Documents #4

2.4.3 Form Variable Population

Field Mappings: Use the same field mappings as the English and Spanish forms for existing population logic.

2.4.4 Form Generation Conditions

Update SAR 7/SAR 2/SAR 7 Addendum Form generation batch job to generate threshold languages

Update batch job (PB00R412) to generate the SAR 7/SAR 2/SAR 7 Addendum packet in newly added threshold languages.

Tech Note: Update CT942_ S7M (SAR 7 Addendum/SAR 2/SAR 7)

Form Print/Mailing Options

Threshold packets will have the same Form Print/Mailing Options as their corresponding English/Spanish packets.

Print Options:

Blank Template	Print Local without Save	Print Local and Save	Print Central and Save	Reprint Local	Reprint Central
Y	Y	Y	Y	Y	Y

Mailing Options:

Mailing Options	Option for SAR 7/SAR 2/SAR 7 Addendum Packet
Mail-To (Recipient)	When generated through the batch process, the Primary Applicant. When generated through Template Repository, the individual selected on the 'Customer Name' dropdown on the Document Parameters page.
Mailed From (Return)	Worker's Office Address
Mail-back-to Address	BRM Address
Outgoing Envelope Type	Standard
Return Envelope Type	BRM

Mailing Options	Option for SAR 7/SAR 2/SAR 7 Addendum Packet
Special Paper Stock	N/A
Mail Priority	Same Day Priority

Form Control:

Tracking Barcode	BRM Barcode	Imaging Barcode
Y	Y	Y

Additional Options:

Requirement	Option for SAR 7/SAR 2/SAR 7 Addendum Packet
Post to Self-Service Portal	Y

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Correspondence	SAR 2 (6/19) Mockups	SAR_2_English.pdf SAR_2_Spanish.pdf SAR_2_Arabic.pdf SAR_2_Armenian.pdf SAR_2_Cambodian.pdf SAR_2_Chinese.pdf SAR_2_Farsi.pdf SAR_2_Hmong.pdf SAR_2_Korean.pdf SAR_2_Lao.pdf SAR_2_Russian.pdf SAR_2_Tagalog.pdf SAR_2_Vietnamese.pdf
2	Correspondence	SAR 7 Addendum (4/13) Mockups	SAR_7_ADDENDUM_English.pdf SAR_7_ADDENDUM_Spanish.pdf SAR_7_ADDENDUM_ Arabic.pdf SAR_7_ADDENDUM_ Armenian.pdf SAR_7_ADDENDUM_Chinese.pdf

			SAR_7_ADDENDUM_Farsi.pdf SAR_7_ADDENDUM_ Hmong.pdf SAR_7_ADDENDUM_ Korean.pdf SAR_7_ADDENDUM_ Lao.pdf SAR_7_ADDENDUM_ Russian.pdf SAR_7_ADDENDUM_ Tagalog.pdf SAR_7_ADDENDUM_Vietnamese.pdf
3	Correspondence	SAR 7 MockUps	SAR_7_ Arabic.pdf SAR_7_ Armenian.pdf SAR_7_Cambodian.pdf SAR_7_Chinese.pdf SAR_7_Farsi.pdf SAR_7_ Hmong.pdf SAR_7_ Korean.pdf SAR_7_ Lao.pdf SAR_7_ Russian.pdf SAR_7_ Tagalog.pdf SAR_7_Vietnamese.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-222367

Create page to turn off Disaster CalFresh program

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Jimmy Tu
	Reviewed By	Matt L., Michael W.

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
9/23/2021	1.0	Initial Version	Jimmy Tu
7/19/2022	1.1	Content Revision: Updated Section 2.1.3 #1 and #4. Updated 2.2.3 #3g and #4f	Jimmy Tu

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1 OVERVIEW

1.1 Current Design

Disaster CalFresh (DCF) is turned on for individual counties after extensive coordination with the State and affected counties and an approval from the Food and Nutrition Services (FNS). Turning off DCF functionality required an additional SCR, which can take several days to implement.

1.2 Requests

Create a new page in the system that will allow a Consortium Manager to turn off DCF functionality for individual Counties in real-time.

1.3 Overview of Recommendations

1. Create a new 'Disaster Services List' page that will list all the disasters for a specific county.
2. Create a new 'Disaster Services Detail' page that will give users the ability to deactivate disaster services for a specific county.

1.4 Assumptions

1. Universal User is a project staff user.

2 RECOMMENDATIONS

2.1 Disaster Services List Page

2.1.1 Overview

This is a new list page that will list out all the disasters for a specific County. Users will be able to view and search for past and current Disasters.

2.1.2 Disaster Services List Page Mockup

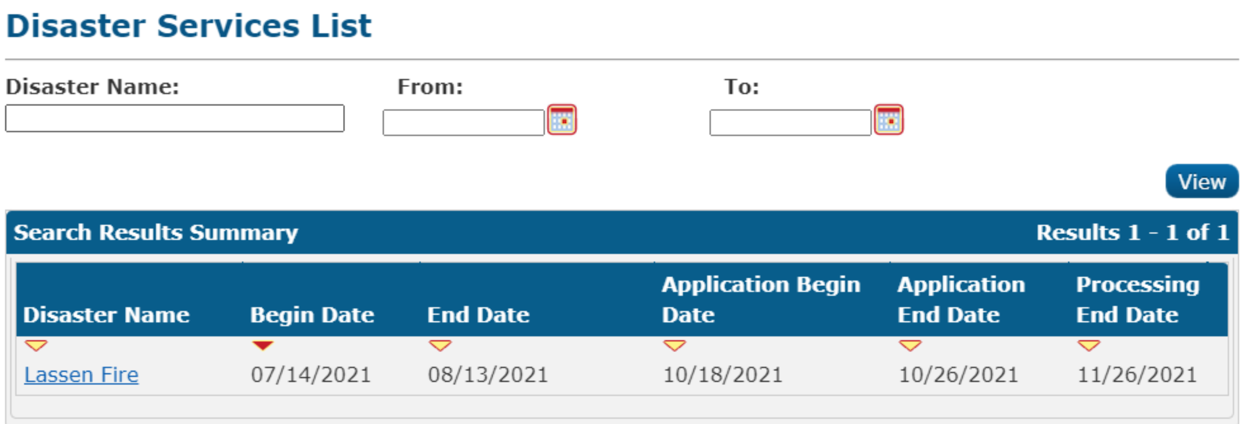

Figure 2.1.1 – Disaster Services List Page (Without Edit Security Right)

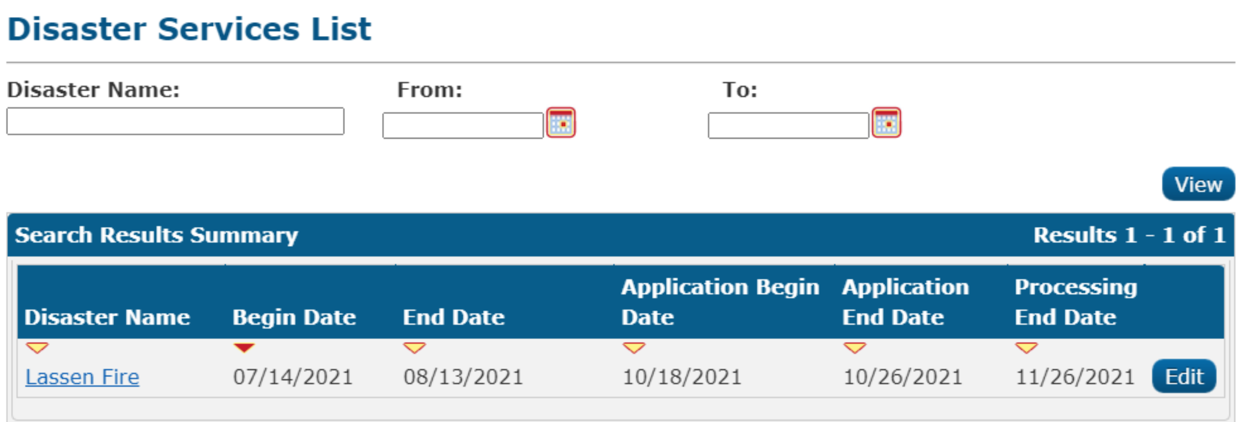

Figure 2.1.2 – Disaster Services List Page – (With Edit Security Right)

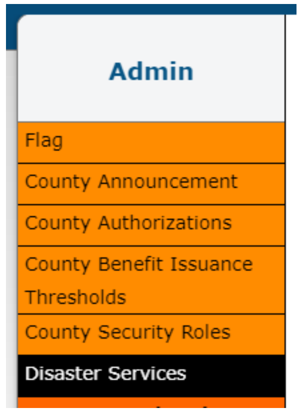

Figure 2.1.3 – Disaster Services – Task Navigation

2.1.3 Description of Changes

~~1.~~ Create a new 'Disaster Services List' page that will be limited to Consortia Management security, which will allow the user to see a list of all current and past disasters for a specific county ~~(starting after the implementation of this SCR).~~

2. Sort by all the records on this page by Begin Date descending.
3. Add the following fields on the Disaster Services List page:
    a. Disaster Name – This is where users will be able to enter a string to search a Disaster. It will not be case sensitive and will be able to search for substrings of words.
        i. Ex: Searching for the Disaster Name 'Rinity' will also present the record with the Disaster Name 'Trinity'.
    b. From – This field will search for records where the End Date is after the value provided in this field.
        i. Add the following validation:
            1. From – From date cannot be after To date.
    c. To – This field will search for records where the Begin Date is before the value provided in this field.
        i. Add the following validation:
            1. To – To date cannot be before From date.
    d. View – This button is used to view all records within the search parameters specified in the "Disaster Name", "From", and 'To" fields.
4. Add a Search Results Summary table with the following columns:
    a. Disaster Name – This is the name of the Disaster. The Disaster Name field will have a hyperlink that will navigate the user to the Disaster Service Detail page in view mode. Users will need the 'DisasterServicesDetailView' security right to use this hyperlink. This will be a sortable field.
    b. Begin Date – This will be the date that the disaster benefits begin. This will be the default sortable field.
    c. End Date – This will be the date that the disaster benefits end. This will be a sortable field.

d. Application Begin Date – This will be the date that the disaster benefits begin in CalSAWS. This will be a sortable field.
e. Application End Date – This will be the date that the disaster benefits end in CalSAWS. This will be a sortable field.
f. Processing End Date – This will be the last day to process disaster benefits. This will be a sortable field.
g. Edit button – To view and use the edit button, the user will need to have the 'DisasterServicesDetailEdit' security right and be a Universal User. This button will take users to the Disaster Services Detail page in edit mode.

5. Only Disaster Services for the specific county the user is in the context of will be displayed on the Disaster Service List page.

2.1.4 Page Location

- **Global:** Admin
- **Local:** Admin Tools
- **Task:** Disaster Services – This is a new task navigation that will be located directly under the County Security Roles Task Navigation. User will need 'DisasterServiceListView' security right to view this Task Navigation.

2.1.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
DisasterServicesListView	This will allow the user to view the Disaster Services List page.	Disaster Services View Disaster Services Edit
DisasterServicesDetailView	This will allow the user to view the Disaster Service Detail page.	Disaster Services View Disaster Service Edit
DisasterServicesDetailEdit	This will allow the user to edit the Disaster Services Detail page.	Disaster Services Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Disaster Services View	This will allow the user to view the Disaster Services List and Detail page.	Project Discretion.
Disaster Services Edit	This will allow the user to edit the Disaster Services Detail page.	Project Discretion.

2.1.6 Page Mapping

Create page mapping for the new fields.

2.1.7 Page Usage/Data Volume Impacts

None.

2.2 Disaster Services Detail Page

2.2.1 Overview

This is a new detail page that will be used to deactivate Disaster Services for individual counties. These are all the disasters for the specific county.

2.2.2 Disaster Services Detail Page Mockup

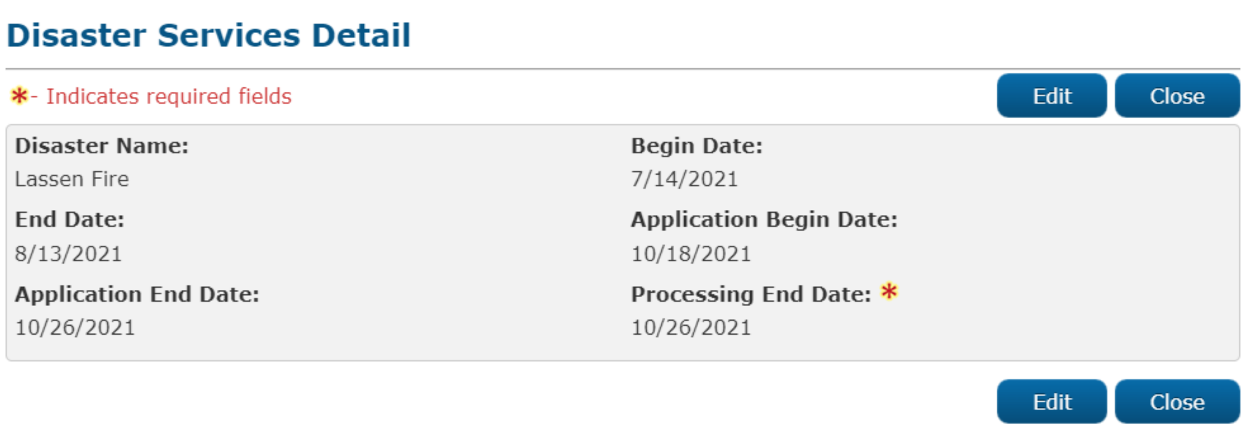

Figure 2.2.1 – Disaster Services Detail Page – View Mode

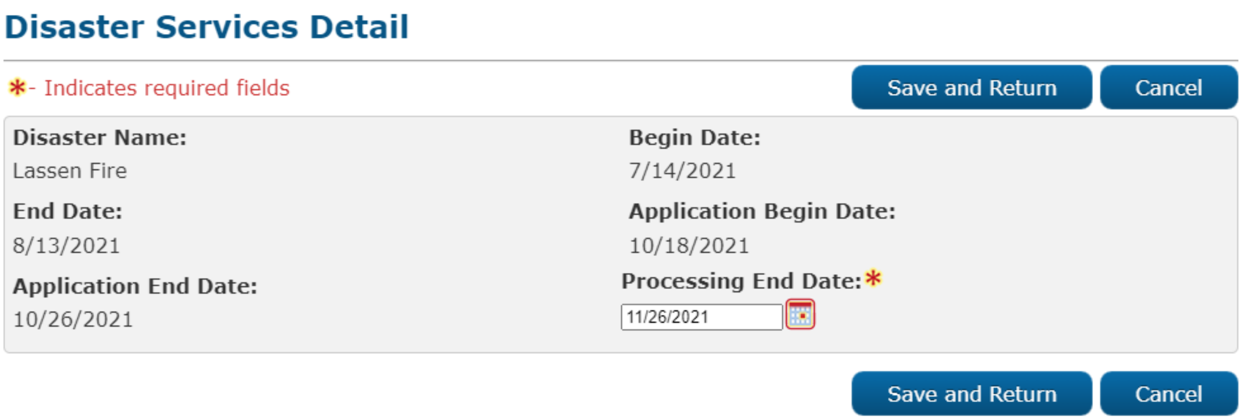

Figure 2.2.2 – Disaster Services Detail Page – Edit Mode

2.2.3 Description of Changes

1. Create a new 'Disaster Services Detail' page that will allow the user to turn off DCF functionality for individual Counties as needed in real time.
2. Add two new validations on the Processing End Date field to verify that the Processing End Date:
    a. Processing End Date – Processing End Date must be after the Application End Date.
    b. Processing End Date – Processing End Date cannot be before the current System Date.
3. Include the following fields and buttons on the Disaster Services Detail page on View Mode:
    a. Disaster Name – This is the name of the disaster.
    b. Begin Date – This will be the date that the disaster benefits begin.
    c. End Date – This will be the date that the disaster benefits end.
    d. Application Begin Date – This will be the date that the disaster benefits begin in CalSAWS.
    e. Application End Date – This will be the date that the disaster benefits end in CalSAWS.
    f. Processing End Date – This will be the last day to process disaster benefits.
    g. Edit – This button will only display if the user has the 'DisasterServicesDetailEdit' security right and be a Universal User. This button will bring the user to the Disaster Services Detail page in Edit mode.
    h. Close – This button will close the Disaster Services Detail page in view mode and return the user to the Disaster Service List Page.
4. Include the following fields on the Disaster Services Detail page in Edit Mode:
    a. Disaster Name – This is the name of the disaster.

b. Begin Date – This will be the date that the disaster benefits begin.
c. End Date – This will be the date that the disaster benefits end.
d. Application Begin Date – This will be the date that the disaster benefits begin in CalSAWS.
e. Application End Date – This will be the date that the disaster benefits end in CalSAWS.
f. Processing End Date – The user will enter the last day to process disaster benefits in this field. This is a required field. This will be a date field in MM/DD/YYYY format.
g. Save and Return – This button will save the record with the new updated information and return the user to the Disaster Service List page.
h. Cancel – This cancel button will cancel all changes made to the record and retain the values that were previously populated before being edited. This button will return the user to the Disaster Service List page.

2.2.4 Page Location

- **Global:** Admin
- **Local:** Admin Tools
- **Task:** Disaster Services – This is a new task navigation that will be located directly under the County Security Roles Task Navigation. User will need 'DisasterServiceListView' security right to view this Task Navigation.

2.2.5 Security Updates

1. Security Rights

Security Right	Right Description	Right to Group Mapping
DisasterServicesDetailEdit	This will allow the user to edit the Disaster Services Detail page.	Disaster Services Edit

2. Security Groups

Security Group	Group Description	Group to Role Mapping
Disaster Services Edit	This will allow the user to edit the Disaster Services Detail page.	Project Discretion.

2.2.6 Page Mapping

Create page mapping for the new fields.

2.2.7 Page Usage/Data Volume Impacts

None.

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Security Rights/Groups	Security Matrix for Disaster Services List / Detail page.	CA-222367 Disaster Services Security Mat

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2.16.4.4	The LRS shall include the ability to process a mass update that involves the development of new policy in response to changes in federal, State, and local laws, rules, regulations, ordinances, guidelines, directives, policies, and procedures.	The new Disaster Services List and Detail pages are being created due to new changes in State policy.

4.2 Migration Requirements

None.

5 MIGRATION IMPACTS

None.

6 OUTREACH

None.

7 APPENDIX

None.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-223587

Enhance functionality for forms generated during Run EDBC

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Connor Gorry
	Reviewed By	Maria Arceo, Priya Sridharan, Raj Devidi, Himanshu Jain

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
7/12/21	1.0	Initial Creation	Connor Gorry
9/23/21	1.1	Updated per Committee Feedback	Connor Gorry
11/19/21	2.0	Content Revision 1 Removed AAP, FC 3, and FC 3A from list of affected Forms in Recommendation 2.1, as these Forms can only be printed locally.	Connor Gorry
7/20/22	3.0	Content Revision 2 Added #7 to recommendation 2.1.2 to clarify desired functionality when Forms are generated in separate EDBC Runs on different days. Added Assumption #8 on button and online message verbiage.	Connor Gorry

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1 OVERVIEW

1.1 Current Design

Currently, NOAs generated through Run EDBC processes can be previewed, authorized on a 1st (Worker) or 2nd (Supervisor) level, or rejected, halting their distribution.

There are nine Forms that are generated by the CalSAWS system via Run EDBC, which do not share these capabilities. At present, Forms generated via EDBC cannot be previewed and can be issued prior to 1st/2nd Level Authorization, or if the EDBC is Rejected.

1.2 Requests

Update EDBC generated Forms to only generate after EDBCs are fully authorized. Allow for Forms Generated via Run EDBC to only generate upon appropriate EDBC Authorization.

Update the Form Number of FC 3A. Currently the form number on the bottom displays FC 3 even though it is FC 3A.

1.3 Overview of Recommendations

1. Enhance Functionality for 9 Forms generated via Run EDBC
2. Update FC 3A Form Footer

1.4 Assumptions

1. The SAR 2 will be generated via EDBC after CA-219921; It will have the same functionalities as other Forms generated via EDBC and is included in the list of identified Forms below.
2. The individual trigger conditions for these Forms will not be altered with this change; This change will only update these Forms' abilities to be Previewed, Authorized, Rejected, etc.
3. No other changes will be made to the FC 3A Form, aside from the footer.
4. Other Forms are currently generated as full-form NOA Fragments, and already utilize these functionalities. Form Fragments other than those identified here will not be affected by this change.
5. Because these are Forms that are also generated via the Template Repository and Online Pages, we will not give the 'Reject/'Rejected' option and status for previewed Forms. Instead, they will use the existing Print Central Cancel functionality, shared by other Forms.
6. Based on existing logic, if a Form is generated through 'Save and Continue' via Run EDBC, then the EDBC is re-run on the same day, the Form will be deleted if there is a new instance of a Form created based on the re-run EDBC results. Based on the new EDBC results, if there are no new instances of the Form

generated, then the existing generation of the Form must be Central Print Canceled by the User.

7. GA/GR Forms generated via EDBC utilize part of the framework. These Forms will be regression tested with CA-225258.
8. Existing buttons and messages that appear on the Online page reading 'Preview NOA' or 'No NOAs were generated…" will remain unchanged with this SCR.

2 RECOMMENDATIONS

2.1 Update Functionality for Forms generated via Run EDBC

2.1.1 Overview

Forms generated via Run EDBC can currently be issued prior to 1st and 2nd level Authorization, or if the EDBC is rejected. These Forms will be updated to be generated after the EDBC is Fully Authorized.

The following Forms will be updated with additional functionalities, outlined in Section 2.1.2:

	Form Number (TEMPL_NUM_IDENTIF)	**Languages**
1	AR 2	EN, SP
2	AR 2 SAR	EN, SP
3	CW 2211	EN, SP, AE, CA, CH, KO, RU, TG, VI
4	CW 2212	EN, SP, AE, CA, CH, KO, RU, TG, VI
5	CW 2215	English
6	SAR 2*	EN, SP, Threshold

*The SAR 2 will be triggered via EDBC Logic with the implementation of CA-219921, scheduled for the same release as this change.

2.1.2 Add Functionality for Forms generated via Run EDBC

Update the EDBC logic surrounding Forms Generated via Run EDBC to:

1. Show Forms generated via EDBC in the 'Distributed Documents Search' Page after 'Save and Continue'
2. Allow identified Forms to be Previewed, as NOAs generated via EDBC currently can be
3. Allow Forms to be Authorized with existing levels of Authorization, chosen by the county
    a. 1st Level (Supervisor) Authorization
    b. 2nd Level Authorization
4. Set Forms generated via when the EDBC has been Accepted to existing 'Preview' status until actioned

5. After ‘Save and Continue’, the Form will be ‘Pending Print Central’ status
    a. The Form can then be set to ‘Print Central Cancelled’ (see below) or will be sent to Central Print at the end of the day based on the chosen option
6. If an EDBC has not been ‘Accepted and Saved’ or the EDBC is re-run while in a ‘Preview’ status, a Re-Run EDBC will display a new instance of the Form until ‘Accepted and Saved’.
7. If EDBC is re-run on a following day, all existing Forms for a program that are in ‘Preview’ status will be deleted. If a new Form is created, a new iteration of the Form(s) will be set to ‘Preview’ status and be visible until actioned.

2.2 Update FC 3A NOA Form Footer

2.2.1 Overview

Currently, the footer of NOA Form FC 3A reads ‘FC 3’. This will correct FC 3A’s footer in when generated as a NOA and in the Template Repository.

State Form: FC 3A (1/2004)

Programs: Foster Care

Attached Forms: N/A

Forms Category: Form

Template Repository Visibility: All Counties

Languages: English, Spanish

2.2.2 Update FC 3A XDP

The FC 3A will have its footer updated with the correct form number (Currently, it reads ‘FC 3’).

Form Header:

Form Title (Document List Page Displayed Name): AFDC-FG/U Worksheet

Form Number: FC 3A

Include NA Back 9: N

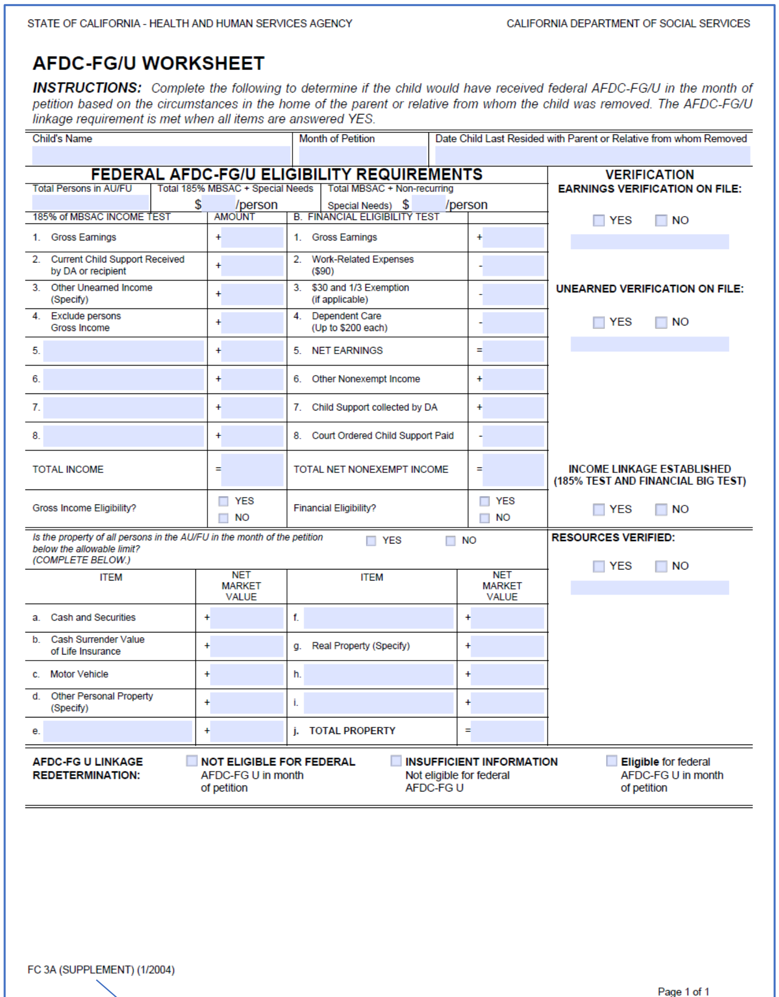
Imaging Form Name: AFDC-FG/U Worksheet

Imaging Document Type: Foster Care (FC)

Imaging Case/Person: Case

Form Mockups/Examples: See Supporting Documents #1

Update the FC 3A XDP with the correct Form Number in the Footer.



STATE OF CALIFORNIA - HEALTH AND HUMAN SERVICES AGENCY — CALIFORNIA DEPARTMENT OF SOCIAL SERVICES

AFDC-FG/U WORKSHEET

INSTRUCTIONS: *Complete the following to determine if the child would have received federal AFDC-FG/U in the month of petition based on the circumstances in the home of the parent or relative from whom the child was removed. The AFDC-FG/U linkage requirement is met when all items are answered YES.*

Child's Name	Month of Petition	Date Child Last Resided with Parent or Relative from whom Removed

FEDERAL AFDC-FG/U ELIGIBILITY REQUIREMENTS

Total Persons in AU/FU	Total 185% MBSAC + Special Needs	Total MBSAC + Non-recurring Special Needs)
	$ /person	$ /person

185% of MBSAC INCOME TEST	AMOUNT	B. FINANCIAL ELIGIBILITY TEST	
1. Gross Earnings	+	1. Gross Earnings	+
2. Current Child Support Received by DA or recipient	+	2. Work-Related Expenses ($90)	-
3. Other Unearned Income (Specify)	+	3. $30 and 1/3 Exemption (if applicable)	-
4. Exclude persons Gross Income	+	4. Dependent Care (Up to $200 each)	-
5.	+	5. NET EARNINGS	=
6.	+	6. Other Nonexempt Income	+
7.	+	7. Child Support collected by DA	+
8.	+	8. Court Ordered Child Support Paid	-
TOTAL INCOME	=	TOTAL NET NONEXEMPT INCOME	=
Gross Income Eligibility?	YES NO	Financial Eligibility?	YES NO

VERIFICATION

EARNINGS VERIFICATION ON FILE: YES NO

UNEARNED VERIFICATION ON FILE: YES NO

INCOME LINKAGE ESTABLISHED (185% TEST AND FINANCIAL BIG TEST) YES NO

Is the property of all persons in the AU/FU in the month of the petition below the allowable limit? (COMPLETE BELOW.) YES NO

RESOURCES VERIFIED: YES NO

ITEM	NET MARKET VALUE	ITEM	NET MARKET VALUE
a. Cash and Securities	+	f.	+
b. Cash Surrender Value of Life Insurance	+	g. Real Property (Specify)	+
c. Motor Vehicle	+	h.	+
d. Other Personal Property (Specify)	+	i.	+
e.	+	j. TOTAL PROPERTY	=

AFDC-FG U LINKAGE REDETERMINATION: **NOT ELIGIBLE FOR FEDERAL** AFDC-FG U in month of petition — **INSUFFICIENT INFORMATION** Not eligible for federal AFDC-FG U — **Eligible** for federal AFDC-FG U in month of petition

FC 3A (SUPPLEMENT) (1/2004)

Page 1 of 1

FC 3A (SUPPLEMENT) (1/2004)

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	Client Correspondence	FC 3A Mockups	FC3A_EN.pdf

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
CAR-1233	The LRS shall replace any pending notice, NOA, or form triggered by a case action which is subsequently changed and authorized prior to the generation of the notice, NOA, or form.	LRS will generate Forms generated via EDBC to a 'Pending' Status and generate only after full authorization.

California Statewide Automated Welfare System

Design Document

CA-226672: DDID 2222, 2284, 2169/2291, 2687, 2688, 2689, 2690, 2691, 2692, 2693, 2694, 2695, 2696

Administration Page for Contact Center

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Kevin Hooke
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
3/15/2021	V0.1	Draft	Kevin Hooke
5/12/2022	V2.0	Content Revision 1: - 2.13.2.4 Updated number of teams limit to 500	Kevin Hooke

Formatted: List Paragraph,Bullet List,FooterText,numbered,List Paragraph1,Paragraphe de liste1,Bulletr List Paragraph,列出段落,列出段落1,List Paragraph2,List Paragraph21,Listeafsnit1,Parágrafo da Lista1, Bulleted + Level: 1 + Aligned at: 0.25" + Indent at: 0.5"

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1 OVERVIEW

This design document is for SCR CA-226672 and outlines the addition of a new page to the Contact Center Enhanced Contact Control Panel (ECCP) application (SCR CA-226844). This new page allows Contact Center administrators to configure Contact Center features for their County.

1.1 Current Design

This functionality does not currently exist - currently Administrators make support requests to the CalSAWS Contact Center Operations Team to make these changes on their behalf. The Operations Team makes these configuration changes by interacting with Amazon Web Services (AWS) Connect directly.

1.2 Requests

Develop a new Administration page that allows Contact Center administrators to configure the following features for their County:

- Emergency Open/Close
- Queue Hold Messages
- Courtesy Callback
- Scheduled Callback
- Queue Limits
- After Call Work
- Roll-on/off or Update Agent
- Emergency Message
- Informational Message
- Supervisor Email Notifications
- Create/Delete/Edit Team
- Quick Connects
- Display Hours of Operation

1.3 Overview of Recommendations

Add a new Administration page to the Enhanced CCP application to allow Contact Center Administrators to configure Contact Center features for their County.

1. Add a new Administration page to the Enhanced CCP application that allows configuration of the following.
    a) Emergency Open/Close
    b) Emergency Messages
    c) Queue Hold Messages
    d) Courtesy Callback

e) Scheduled Callback options
f) Queue Limits
g) After Call Work limits
h) Roll-on/Roll-off and update Agent details
i) Informational Messages
j) Supervisor Email Notifications
k) Create/delete Team(s)
l) Quick Connects
m) Display Hours of Operation

2. Integrate access to the Administration page with CalSAWS role-based security and Single Sign On (SSO). Access is restricted to only users who have the 'Contact Center Admin Page' role.
3. Implement a 'cool down' period that requires a 1minute delay between changes to the same configuration option.

1.4 Assumptions

1. All features on the Administration page are customizable by County. An Admin user with the required role to access the Admin Page can view and change the configuration options only for their County.
2. Access to the new Administration page will be via Single Sign On (SSO) using existing CalSAWS security functionality.
3. The following Administration page functions will be disabled for Regional Call Center only counties:
    a) Emergency Open/Close
    b) Emergency Messages
    c) Queue Hold Messages
    d) Courtesy Callback
    e) Scheduled Callback options
    f) Queue Limits
    g) Informational Messages
    h) Supervisor Email Notifications

2 RECOMMENDATIONS

This section outlines recommendations to add a new Administration page to the Enhanced CCP application.

2.1 Administration Page

2.1.1 Overview

Add a new Administration page to the Enhanced CCP application. This page allows the user to customize features of the Contact Center for their County.

2.1.2 Description of Changes

1. Add a new icon/menu item to the Enhanced CCP application, that when clicked, displays the new Administration page.
2. Add a new page to the new Enhanced CCP application that displays available configuration options as a navigation menu.
3. Clicking on items in this menu displays a panel with the configurable options for that selected item. Each of these options is described in the below sections.

2.1.2.1 Administration page Mockup

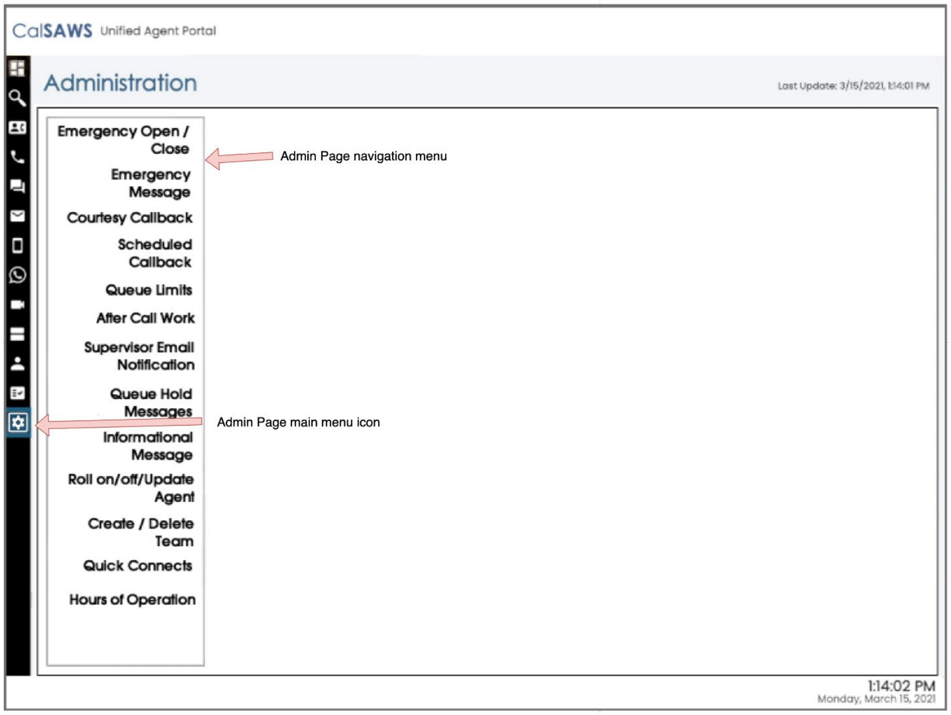


Figure 1 Administration page menu options

2.1.2.2 Administration Page Security

The Administration page is a new page added to the Enhanced CCP application. Access to the Enhanced CCP is controlled using the CalSAWS Identify Provider.

Create a new CalSAWS role 'Contact Center Admin Page' in the CalSAWS system.

Access to the Administration page is restricted to CalSAWS users who have this new CalSAWS role assigned for their County.

There is only one level of security for the Administration page:

- If a user has the 'Contact Center Admin Page' role they are able to access the Administration page. A user that has access to the Administration page is allowed to perform all Admin actions on the page.

- If a user does not have the ‘Contact Center Admin Page’ role the menu icon for the Administration page does not display and the user is unable to access the page.

2.1.2.3 Administration Page API Security

User actions on the Administration page result in API (Application Programming Interface) calls to background services within the Contact Center AWS account. These services are accessed using API Gateway. Access to these calls is protected by confirming that the user of the Administration page:

a) Is currently authenticated with their CalSAWS credentials
b) Is assigned the ‘Contact Center Administration page’ role

2.1.2.4 Administration page Security – access without role

If a user does not have the required ‘Contact Center Administration page’ role, the Administration page icon is not displayed in the navigation menu.

2.1.3 Assumptions

1. User must be a CalSAWS user and must be signed on via the CalSAWS Identity Provider (Single Sign-on) to access the Enhanced CCP.
2. The user must have the ‘Contact Center Admin Page’ role to access the Administration page.

2.2 Administration Page Configuration Change ‘Cool-down’

2.2.1 Overview

When the user changes any of the configurable options from the Administration page, there is a 1 minute ‘cool-down’ period before they can make an additional change. This is to prevent the user from making changes within a short period of time.

2.2.2 Description of Changes

If the user attempts to change a configurable option less than 1 minute since the last change, a dialog is displayed, as shown in the following dialog mockup section (see section 2.2.3 figure 3).

The user is prevented from making the attempted change until 1 minute has elapsed since the last successful change.

2.2.3 Configuration Change ('Cool-down') Dialog Mockup

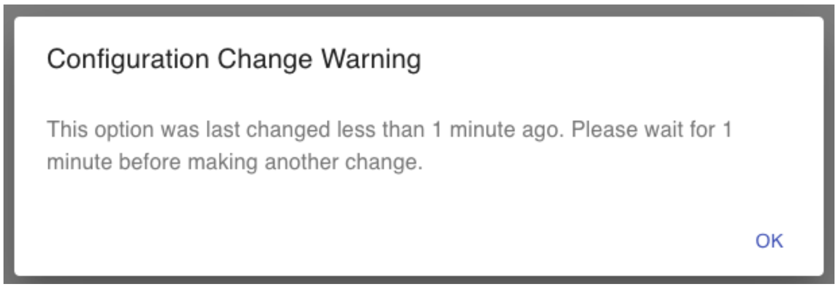


Figure 2 Configuration Change Warning Page Mockup

2.3 Emergency Open/Close

2.3.1 Overview

The Emergency Open/Close feature allows a user of the Administration page to temporarily close the Contact Center for their County in case of an emergency. While closed, all incoming calls to the Contact Center will play the currently selected Emergency Message to the caller (see section 2.9).

The Emergency Message only plays while the Contact Center is closed using this Emergency Open/Close feature. When the Contact Center is re-opened, the automatic message playback will discontinue.

The Emergency Open/Close does not change which Emergency Message is currently selected. The selected Emergency Message can only be changed by an Admin user (using the Emergency Message feature described in section 2.9.

2.3.2 Description of Changes

2.3.2.1 Emergency Open/Close page mockup: Contact Center is open

This page displays when the Contact Center for the user's County is currently open and they click the 'Emergency Open/Close' menu option.

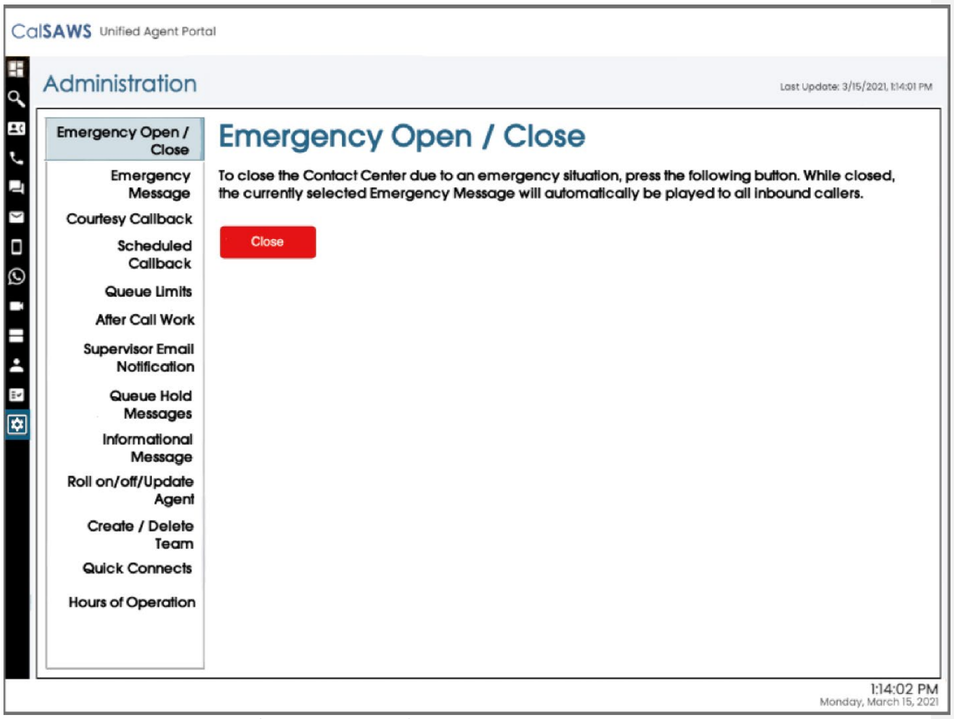


Figure 3 Emergency Closure - Perform Closure Option

2.3.2.2 Emergency Open/Close page mockup: Contact Center is closed

This page displays when the Contact Center for the user's County is currently closed and they click the 'Emergency Open/Close' menu option.

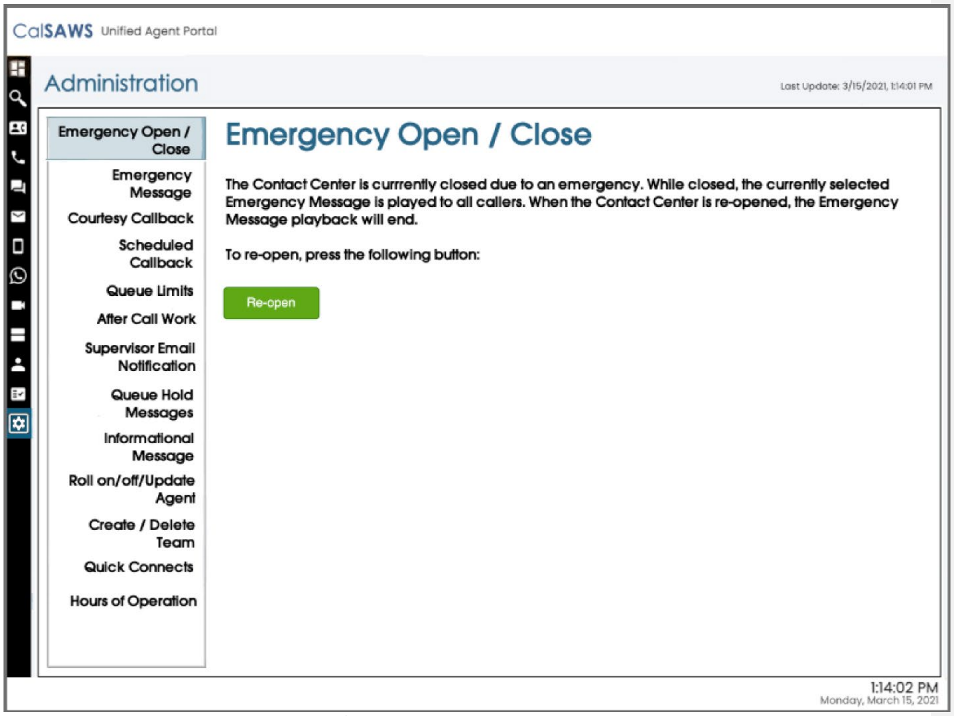


Figure 4 Emergency Closure - Re-open Option

2.3.2.3 Emergency Open/Close – Contact Center closed warning mockup

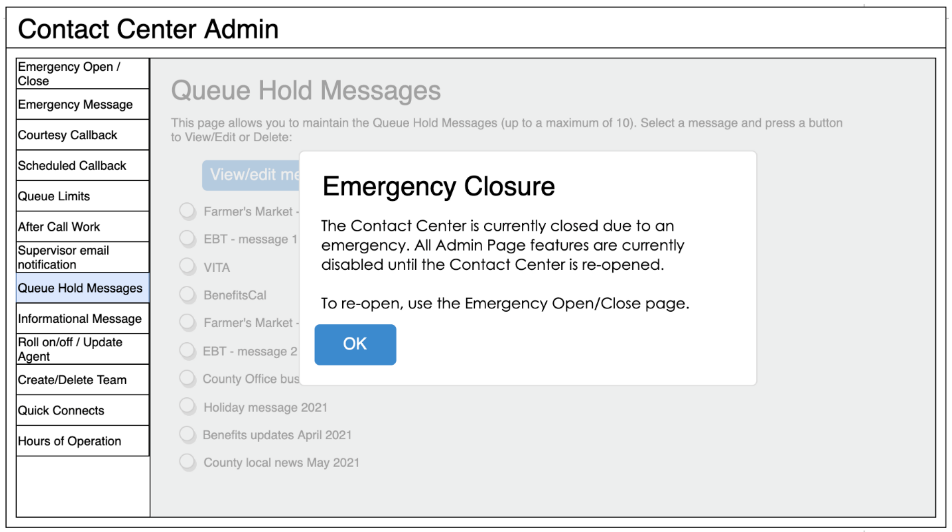


Figure 5 Emergency Closure warning dialog

2.3.2.4 Emergency Open/Close – Contact Center closed warning

If the Contact Center is currently closed due to an emergency and the user clicks on any of the Administration page menu items other than 'Emergency Open/Close', a dialog in Figure 6 is shown to the user. The dialog shows the following message:

"The Contact Center is currently closed due to an emergency. All Administration page features are currently disabled until the Contact Center is re-opened. To re-open, use the Emergency Open/Close page".

If the user presses the "OK" button, the dialog is closed. Features on the current page are available in read-only mode. Any features that perform a create, edit or delete action are disabled until the Contact Center is re-opened.

2.3.2.5 Emergency Open/Close – Contact Center is 'open'

This flow describes the Emergency Open/Close page if the Contact Center is currently in the 'open' state:

1. User selects 'Emergency Open/Close' option from the Administration page

2. System checks the date/time of last Emergency Open/Close. If last change was less than 1 minute ago, then continue, otherwise the "cool-down" dialog is displayed as described in Section 2.2.
3. If last change was more than 1 minute ago, user is prompted with a confirmation message to continue:

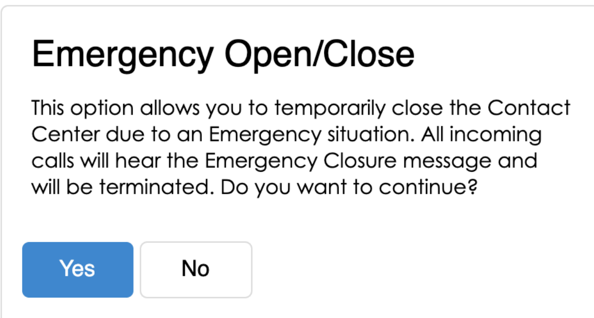


Figure 6 Emergency Closure Confirmation dialog

4. If user selects "No", the user is returned to the Administration page menu and no further action is taken.
5. If the user selects "Yes", the steps in the following section "Perform Emergency Open/Close Procedure" are executed.

2.3.2.6 Emergency Open/Close – Contact Center is 'closed'

This describes the Emergency Open/Close page, if the Contact Center is currently in a 'closed' state:

1. User selects 'Emergency Open/Close option from Administration page
2. Administration page displays Emergency Open/Close re-open dialog:

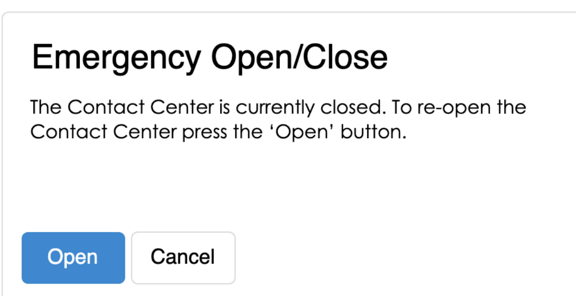


Figure 7 Emergency Open/Close - Re-open dialog

3. The ‘Open’ button is displayed on the page.
4. If the user presses “Cancel”, no action is taken.
5. If the user presses “Open”, the steps in the following section “Perform Emergency Open / Close – Re-open” are executed.

2.3.2.7 Perform Emergency Open/Close - Re-Open via Phone

Update the existing Remote Admin by phone support to allow an authenticated user to perform the Emergency Open and Close process via phone.

This feature complements the performing of the Emergency Open and Close via the Administration page.

- If the closure is performed via the Administration page, the Contact Center can be re-opened using the Administration page or remotely by phone.
- If the closure is performed remotely by phone, the Contact Center can be re-opened remotely by phone or the Administration page.

2.3.2.8 Perform Emergency Open/Close Procedure

When a user selects the ‘Emergency Open/Close option, the system performs the following steps:

1. Calls that are currently in progress with an Agent or are in a queue, continue until they are handled and/or completed.
2. Scheduled Callbacks during the period, when the Emergency Closure is in place will continue, but the callback message will play the Emergency Message and ask the customer to callback at another time.
3. Contact Center Emergency Open/Close status is updated to ‘closed’.
4. The Call Flow for incoming calls checks the Emergency Closure status. If the current status is ‘closed’, the Emergency Message is played to the caller and the call is ended.

2.3.2.9 Perform Re-Open Procedure

1. When a user selects the ‘Re-open’ option, the system performs the following steps: Contact Center Emergency Open / Close status is updated to ‘open’ to indicate Contact Center is now open.
2. The Call Flow for incoming calls checks the Emergency Open/Close status. If the current status is ‘open’, the call flow will continue as normal.

2.3.3 Assumptions

1. All Administration page options will be disabled when Contact Center is closed under an Emergency Closure, apart from the Emergency Closure page and the button to re-open the Contact Center.
2. There is no additional reporting or monitoring to show caller activity during the Emergency Closure (e.g. incoming calls missed while the Contact Center is closed). This information can be retrieved if needed using reports in eGain.
3. This functionality will be disabled for Regional Call Center (RCC) only Counties.

2.4 Queue Hold Messages

2.4.1 Overview

The Queue Hold Messages feature on the Administration page allows the Admin user to add, edit and delete up to 10 custom Queue Hold messages for their County. The content of the message is text, which is used to produce a voice message using text to voice.

The default language for each message is English. Each message can optionally have translated versions of the message in any of the supported languages. The caller's preferred language determines which language version is played. If a translated version for the caller's preferred language is not available then the default English message is played.

These messages are played while a caller is on hold and can be used to remind or inform the caller of upcoming events or other information relevant to the County.

Once a new message is added or an existing message is changed, it is available for playback during the next call waiting in a queue, there is no delay before it can be used.

2.4.2 Description of Changes

2.4.2.1 Queue Hold Messages: No messages defined page mockup

When a user clicks the 'Queue Hold Messages' menu item, if there are no Queue Hold Messages defined, the following page is displayed:

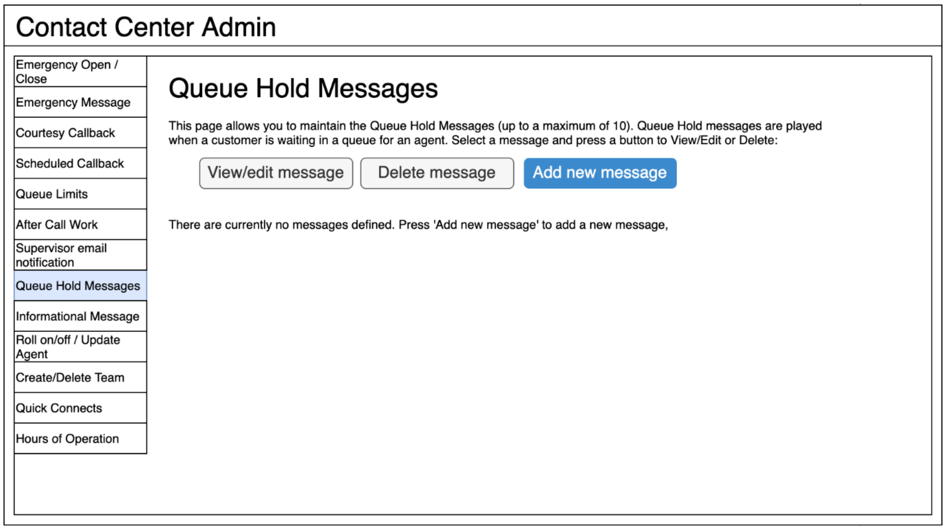


Figure 8 Queue Hold Messages - no messages defined

2.4.2.2 No messages defined

When there are no Queue Hold messages defined, the only enabled option is ‘Add new message’.

1. If the user presses ‘Add new message’, the ‘Add new message’ dialog appears (see section 2.4.2.4 for mockup)

2.4.2.3 Queue Hold Messages: Messages defined page mockup

When a user clicks the ‘Queue Hold Messages’ menu item and there are Queue Hold Messages defined, the following page is displayed:

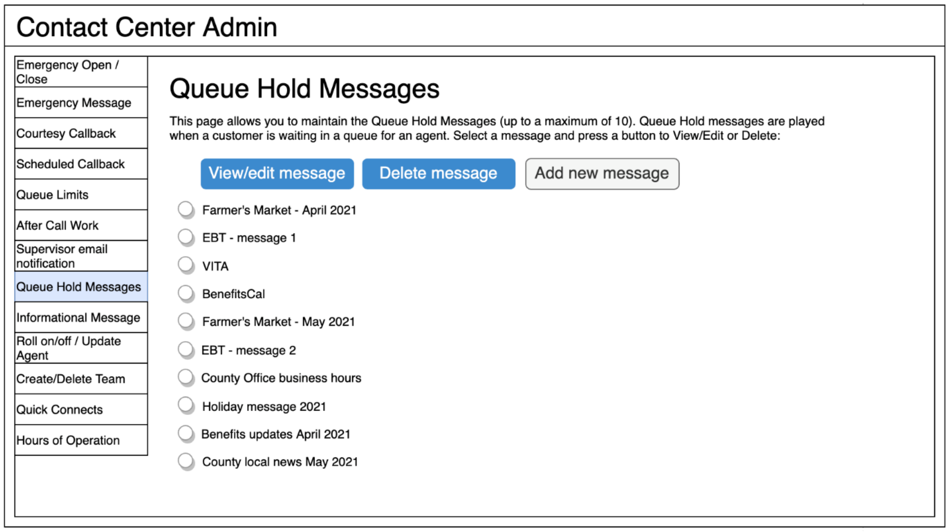


Figure 9 Queue Hold Messages - message display

2.4.2.4 Queue Hold Messages: Add new message page mockup

If the user presses the 'Add new message' button, the following dialog is displayed:

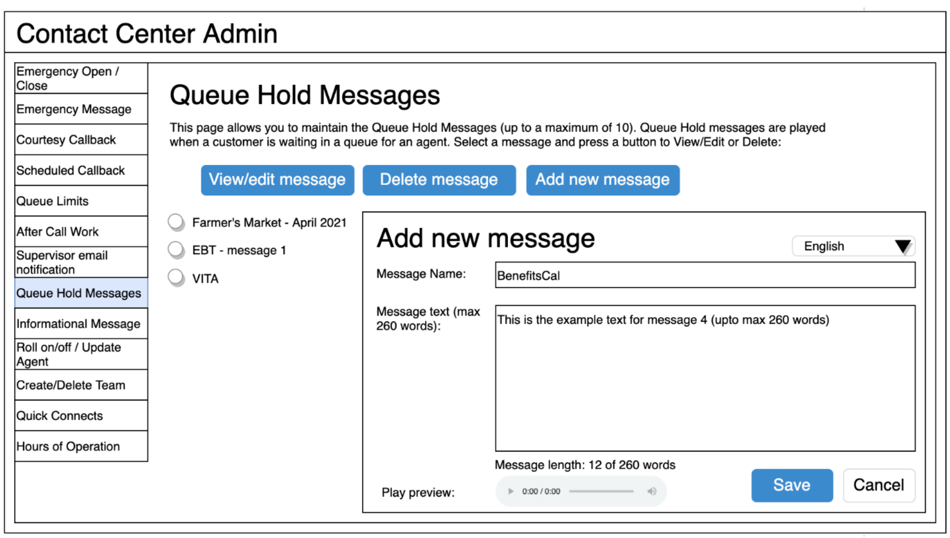


Figure 10 Queue Hold Messages - Add New Message dialog

2.4.2.5 Queue Hold Messages: Language selection dropdown

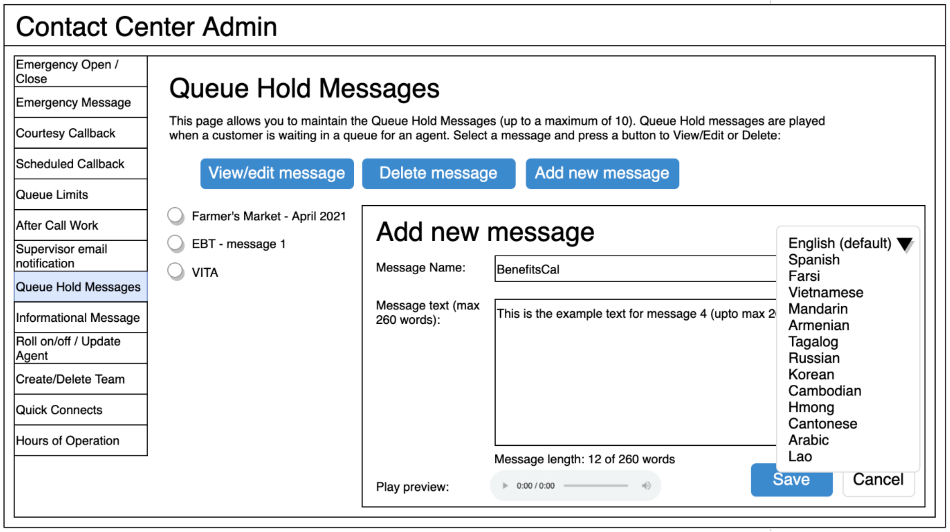


Figure 11 Queue Hold Messages - Language selection dropdown

2.4.2.6 Add new message

1. The ‘Add new message’ button is only displayed if there are less than 10 defined messages. If the maximum of 10 messages is already defined, the ‘Add new message’ button is disabled.
2. If the user presses the ‘Add new message’ button, the ‘Add new message’ dialog is displayed.
3. User enters a unique message name, up to 60 alphanumeric characters.
4. User enters text for the message, up to a maximum of 260 words. The dialog displays a count of the currently entered number of words that updates as the user types, e.g., “12 of 260 words”. The entry field does not accept any additional text entry beyond 260 words.
5. The English version of the message is required.
6. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
    a. English (default)
    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

7. To hear an audio preview of the message text, the user can press the 'play' button on the media control underneath the message text field. This will playback the audio for the entered text.
8. If the user presses the 'Save' button, the message is saved, and the page is updated to show the new message in the list.
9. If the user presses 'Cancel' the dialog is closed and no action is taken.

2.4.2.7 Queue Hold Messages: View/Edit message page mockup

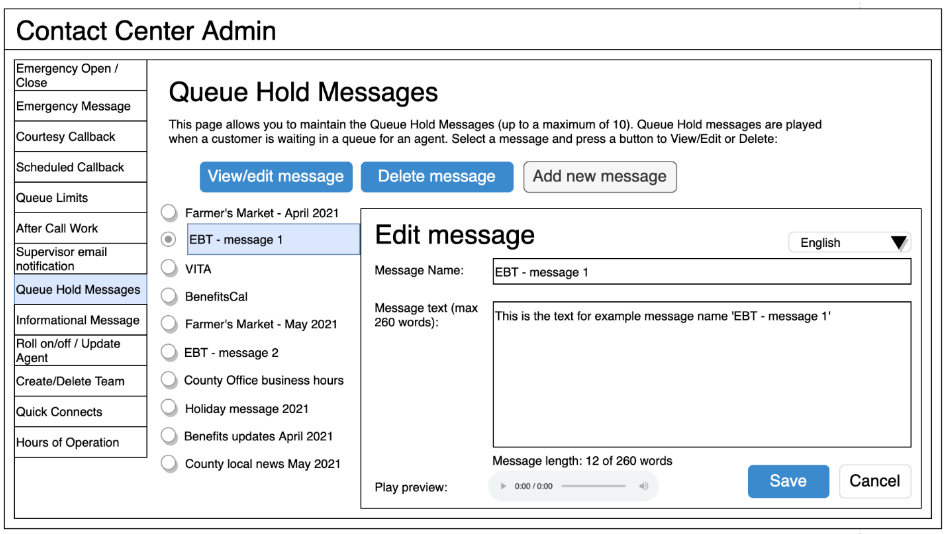


Figure 12 Queue Hold Messages - Edit Message dialog

2.4.2.8 View/Edit message

1. User selects a message by pressing the radio button beside a message. Only one message can be selected.
2. User presses the 'View/Edit message' button, and the 'Edit message' panel is displayed with the 'Message Name' and the 'Message Text' fields populated with the current text of the selected message.

3. User updates the ‘Message Name’ and/or the ‘Message Text’ fields.
4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
    a. English (default)
    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
6. If the user presses the ‘Save button’ the changes are saved and the dialog closes.
7. If the user presses the ‘Cancel’ button, no changes are made and the dialog closes.

2.4.2.9 Queue Hold Messages: Delete Message page mockup

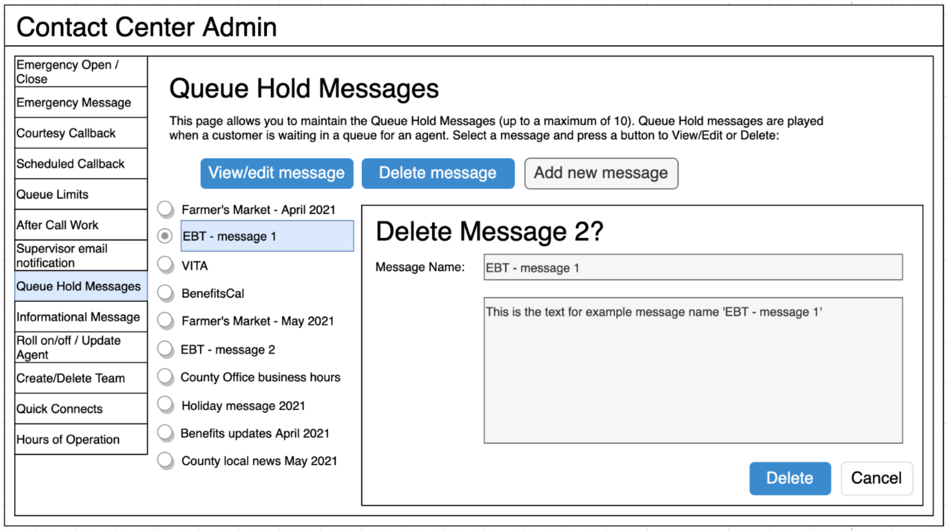


Figure 13 Queue Hold Messages - Delete Message dialog

2.4.2.10 Delete message

1. To delete a message, the user selects the message to delete by pressing the radio button beside the message and presses the 'Delete Message' button.
8. The 'Message Name' and/or the 'Message Text' fields are displayed as read-only fields, and 'Delete' and 'Cancel' buttons are displayed.
2. If the user presses the 'Delete' button, the message is deleted. The dialog is closed. The list of messages is updated to display the remaining messages.
3. If the user presses the 'Cancel' button, the dialog is closed, and no action is taken.

2.4.3 Assumptions

1. Deleting a message is a permanent deletion and deleted messages are not recoverable. The user can add back a message manually as a new message if it is deleted in error or is needed again.
2. This functionality will be disabled for Regional Call Center (RCC) only Counties.

2.5 Courtesy Callback

2.5.1 Overview

The Courtesy Callback configuration page allows the Admin user to turn this feature on or off for their County using the Administration page.

When enabled, the Admin user can configure:

- Number of minutes before the callback option is provided to the caller.
- Start and end time range for each day of the week during which the Courtesy Callback feature is enabled.

If Courtesy Callback is not offered for a specific day, the Start time and End time values are left blank.

2.5.2 Description of Changes

2.5.2.1 Courtesy Callback Disabled Page mockup

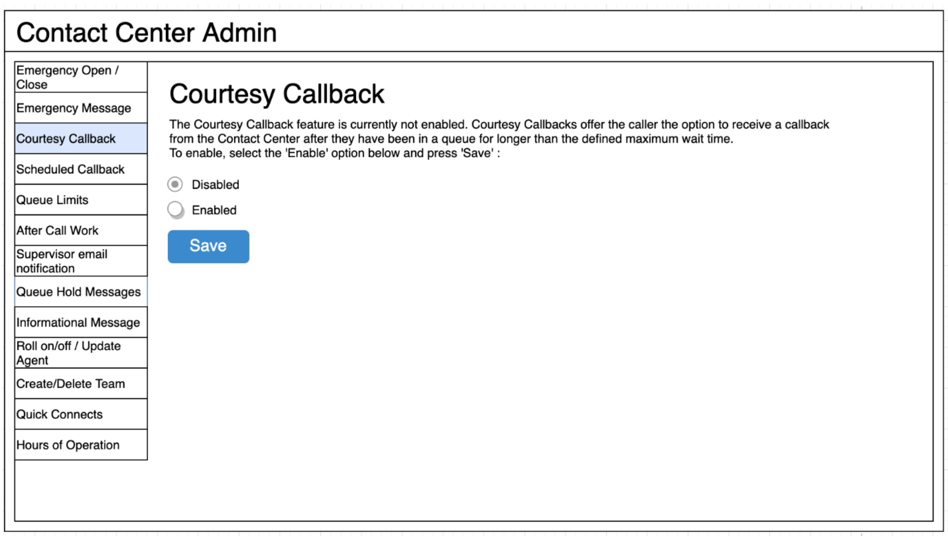


Figure 14 Courtesy Callback feature currently disabled

2.5.2.2 Courtesy Callback Disabled

If the Courtesy Callback feature is currently disabled, the only option available is to Enable the feature.

1. User clicks the 'Enabled' radio button. The Cancel button is additionally displayed.
2. If the user presses Save, the Courtesy Callback feature is enabled, and the page is updated to show the Configuration options described in the next section.
3. If the user presses the Cancel button, the change is not saved and the Courtesy Callback feature remains disabled.

2.5.2.3 Courtesy Callback Enabled: Page mockups

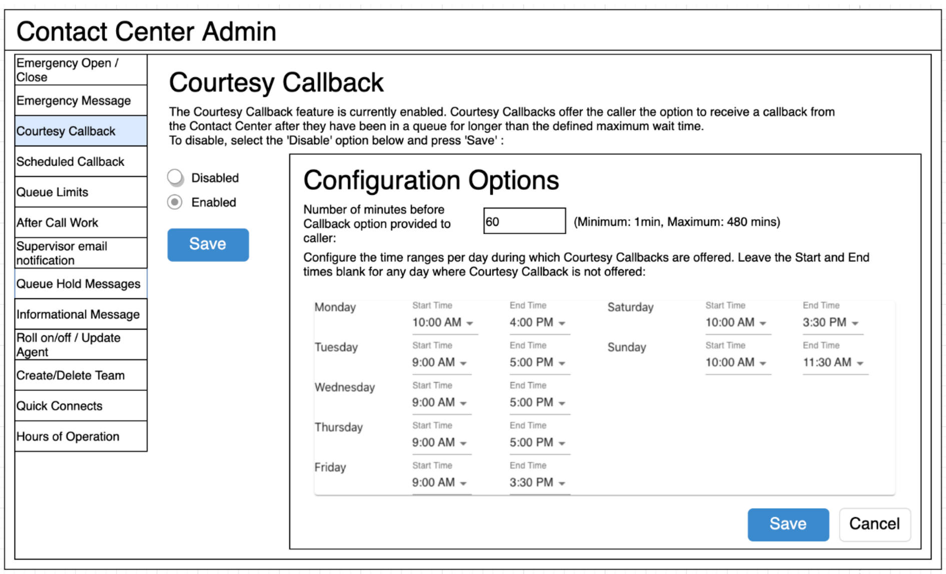


Figure 15 Courtesy Callback Enabled Page Mockup

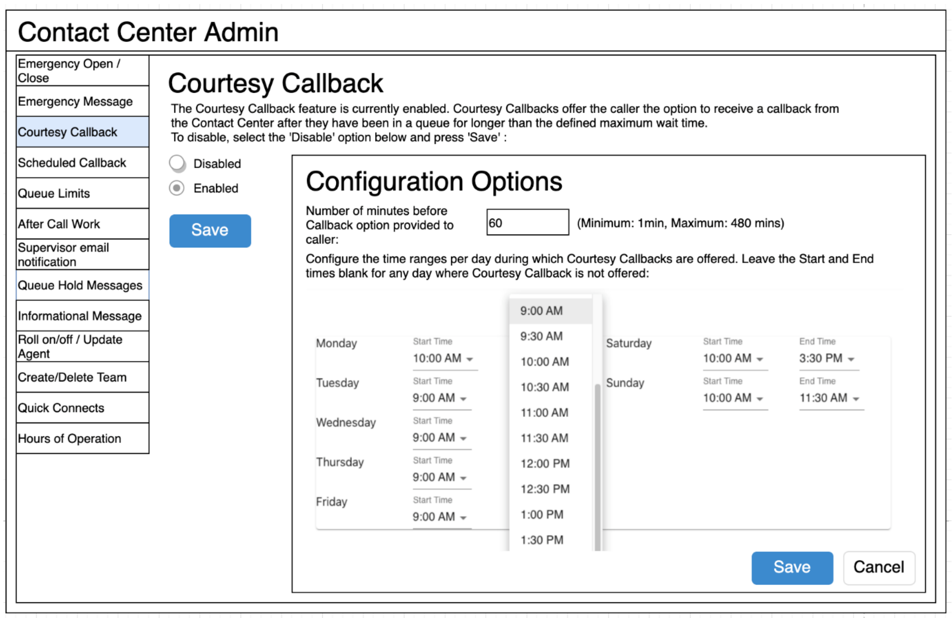


Figure 16 Courtesy Callback Enabled Page Mockup showing time selection dropdown

2.5.2.4 Courtesy Callback Enabled

If the Courtesy Callback feature is enabled, the Configuration Options dialog for this feature is also displayed. When the feature is disabled, this dialog is not displayed.

1. If the Courtesy Callback feature was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute has elapsed since the last change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. User enters a positive integer value for number of minutes before a callback is offered to the caller. The minimum value is 1 minute, and the maximum valid value is 480 minutes (8 hours).
3. If the user attempts to enter a value less than the minimum value or greater than the maximum value, the following error message is displayed beside the entry field:

   "Enter a numeric value between 1 and 480 minutes."

4. The user selects a Start Time and End time for each day of the week to define the time ranges where Courtesy Callbacks are available. The values are selected from a dropdown list (see Figure 15) showing times in 30-minute increments (for example, 9:00 AM, 9:30 AM, 10:00 AM).
5. The selected Start Time must be before the End Time, otherwise a validation error message is displayed beside the field in error:

   "The selected Start Time must be before the End Time."

6. The End Time must be at least 30 minutes after the Start Time, and the End Time must not be the same as the Start Time, otherwise the following error message is display beside the field in error:

   "The End Time must not be the same as the Start Time and must be at least 30 minutes after the Start Time."

7. Only Start Time and End Time options that are within the defined open hours for the County are displayed. Times outside of the open hours are not displayed as valid options to the user.
8. If Courtesy Callbacks are not required for a specific day, the user can leave the Start Time and End Time blank for that day.
9. If Courtesy Callbacks are enabled, at least one day must have a valid Start time and End time configured.
10. If the user presses 'Cancel', any values entered or changed are discarded and no changes are saved. The Configuration Options dialog will revert to show the currently configured values.

2.5.3 Assumptions

1. The Courtesy Callback Start and End times must be within the same business day. For example:
   a. Start time of 9 AM and End time of 5 PM is valid
   b. Start time of 4 PM and End Time if 10 AM is not valid
2. The Start Time and End Time are configurable for each day of the week. If a day is not applicable for that County (e.g. Saturday or Sunday), the Start Time and End Time can be left blank.
3. This functionality will be disabled for Regional Call Center (RCC) only Counties.

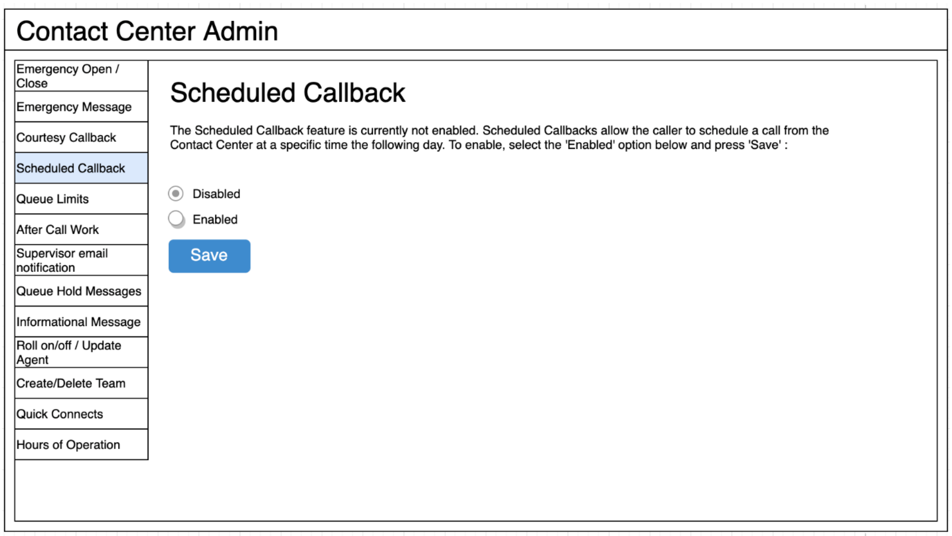
2.6 Scheduled Callback

2.6.1 Overview

The Scheduled Callback feature is enabled or disabled using the Administration page. When enabled, the Admin user can specify how many scheduled callbacks are allowed per each available timeslot. The Scheduled Callback functionality will be implemented with SCR CA-229573

2.6.2 Description of Changes

2.6.2.1 Scheduled Callback – feature disabled page mockup



2.6.2.2 Scheduled Callback – feature disabled

1. To enable the Scheduled Callback feature, user selects the 'Enabled' option and presses 'Save'.
2. The Scheduled Callback feature is enabled. The page is updated to show the Configuration Options dialog showing in the following page mockup.

2.6.2.3 Scheduled Callback – feature enabled page mockup

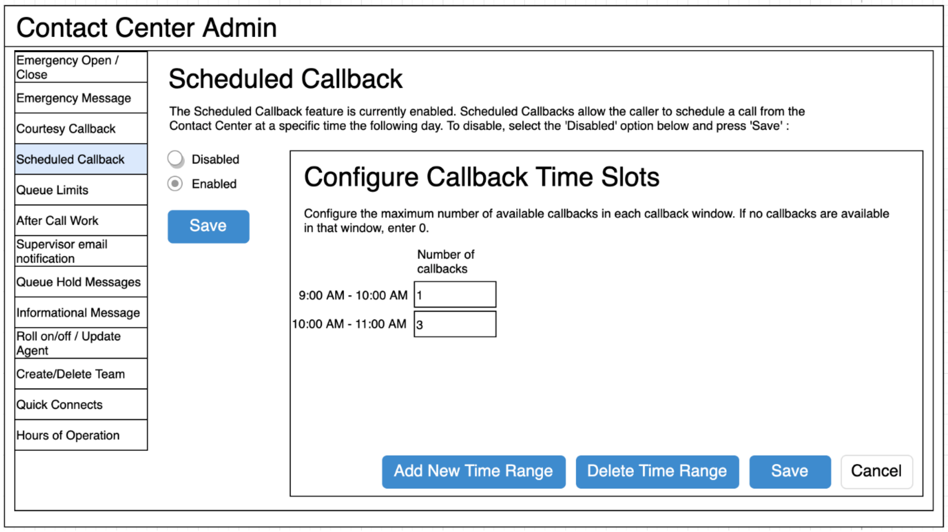


Figure 17 Scheduled Callback - feature enabled, 2 example slots defined

2.6.2.4 Scheduled Callback – feature enabled

1. If the Scheduled Callback feature is enabled, the 'Configure Callback Time Slots' dialog is displayed, showing the currently configured maximum number of callbacks per time slot.
2. If the Scheduled Callback configuration was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute has elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
3. User enters or changes the maximum number of callbacks available per defined timeslot.
4. If 0 is entered for a given timeslot, scheduled callbacks will not be offered to callers for that timeslot.
5. The maximum number of scheduled callbacks per 1 hour time slot is 3. Valid values are 0, 1, 2 and 3.
6. If the user presses 'Save' the system validates the entered values, and if there are no validation errors the values are saved.
7. If any field has an invalid value, it is highlighted in red and an error message is displayed: "One or more timeslots have an invalid value. Please correct the errors and press Save".

8. If the user presses 'Cancel' any changes are discarded and no actions are performed. The displayed callbacks per timeslot revert to the currently configured values.

2.6.2.5 Scheduled Callback – Add new time slot page mockup

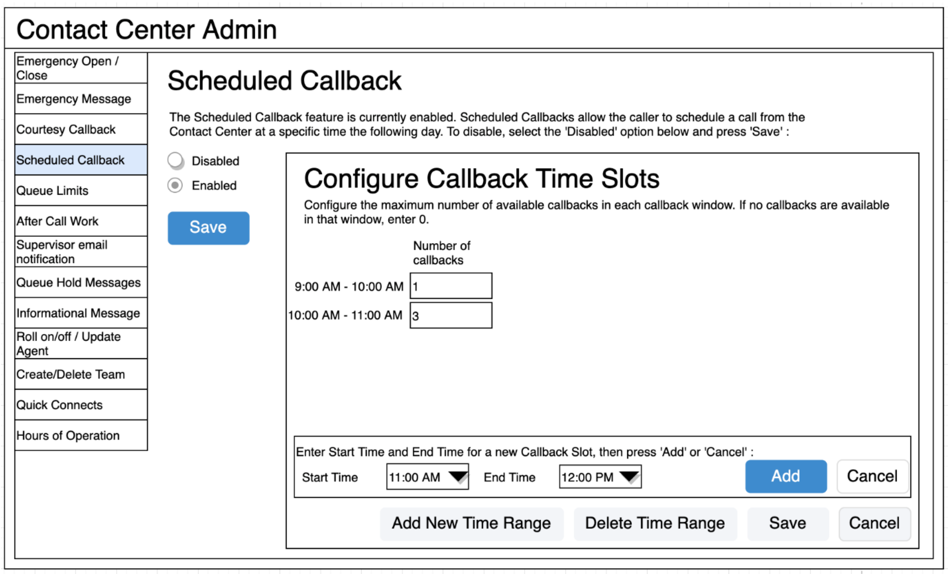


Figure 18 Scheduled Callback - Add new time slot (11:00 AM to 12:00 PM)

2.6.2.6 Scheduled Callback – New time slot added page mockup

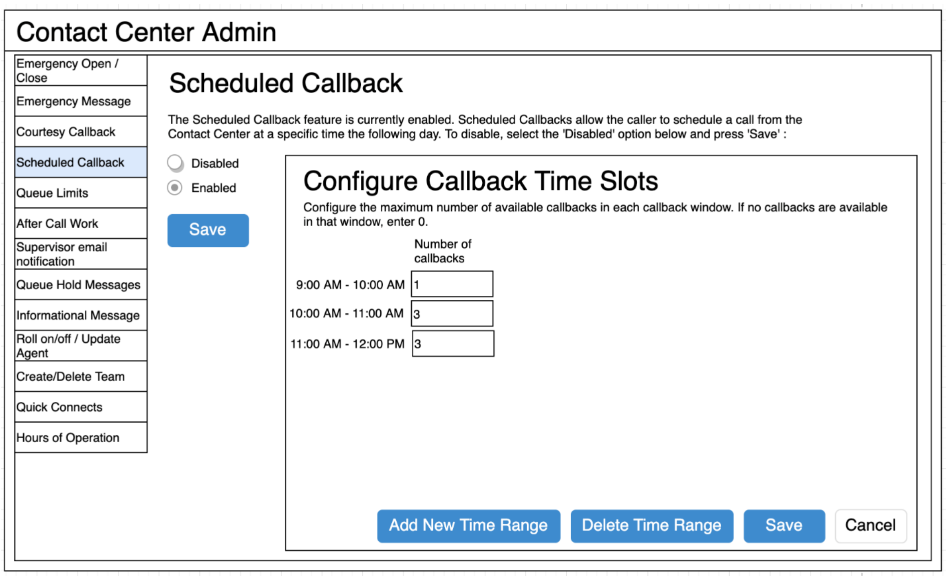


Figure 19 Scheduled Callback - new time slot added (11:00 AM to 12:00 PM))

2.6.2.7 Scheduled Callback – Add new time slot

Figure 18 shows a page mockup with 2 time slots configured (9 AM – 10 AM, and 10 AM to 11 AM), before a new time slot is added.

Figure 19 shows a page mockup after a new time slot added, 11 AM to 12 PM.

1. If the user presses the 'Add new Callback Time Range' button, the dialog to add a new time slot is displayed (as shown in Figure 17).
2. The user selects a Start Time and End Time for the new time slot using the dropdowns. The dropdown lists display available start time and end times at 30-minute increments in 12 hour format (for example, 9:00 AM, 9:30 AM, 10:00 AM, 10:30 AM)
3. If the user presses the 'Add' button, the application validates that:
    a. the Start Time is on or after the County office opening time,
    b. the End Time is before the close of business time for this County,
    c. the new time slot Start Time and End Time does not overlap with any existing time range. For example, if 9:00 AM to 10:00 AM and 10:00 AM to 11:00 AM time slots already exist and the user attempts to add a new 9:30 AM to 10:30 AM time slot, the following error message is displayed:

“The start time and end time (9:30 AM to 10:30 AM) overlaps with existing time slots. Update the start and end times to remove the overlap or press ‘Cancel’”

4. If the new time slot is valid, it is created in the system. The dialog closes, and the displayed list of time slots is updated to show the newly added time slot.
5. If the user presses ‘Cancel’, the dialog is closed, and no changes are saved.

2.6.2.8 Scheduled Callback – Adding new time slot before existing slots - page mockup

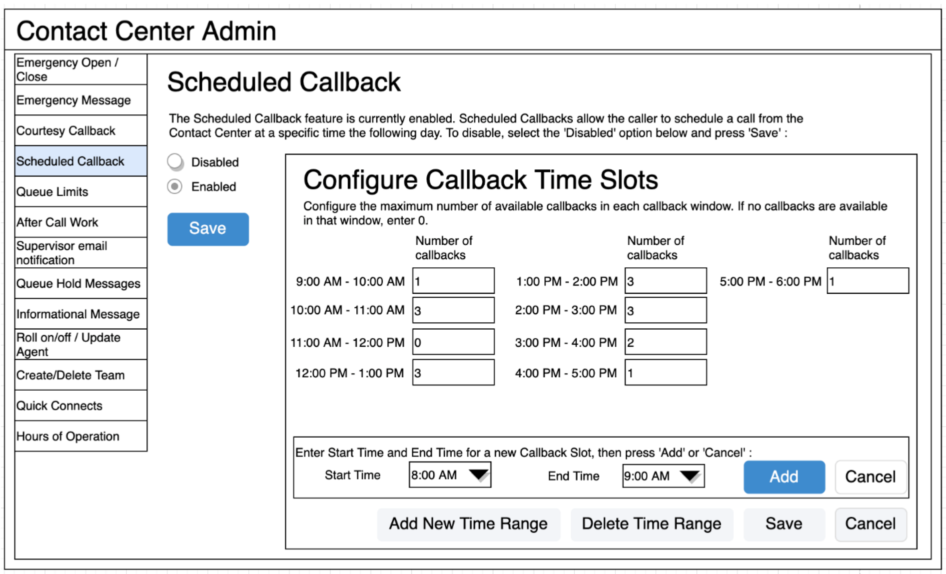


Figure 20 Scheduled Callback - before adding new slot (8:00 AM to 9:00 AM) before existing slots

2.6.2.9 Scheduled Callback – Adding new time slot before existing slots -

1. User presses the ‘Add New Callback Time Range’ button and selects a start and end time before the existing timeslots, for example, 8:00 AM to 9:00 AM.
2. If user presses ‘Save’, the new time slot is added.

3. The displayed timeslots are rearranged to appear in ascending time order. In the above example, the new 8:00 AM to 9:00 AM time slot is displayed first, and the existing time slots are updated on the page to display following the new time slot.

2.6.2.10 Scheduled Callback – New time slot added before existing slots - page mockup

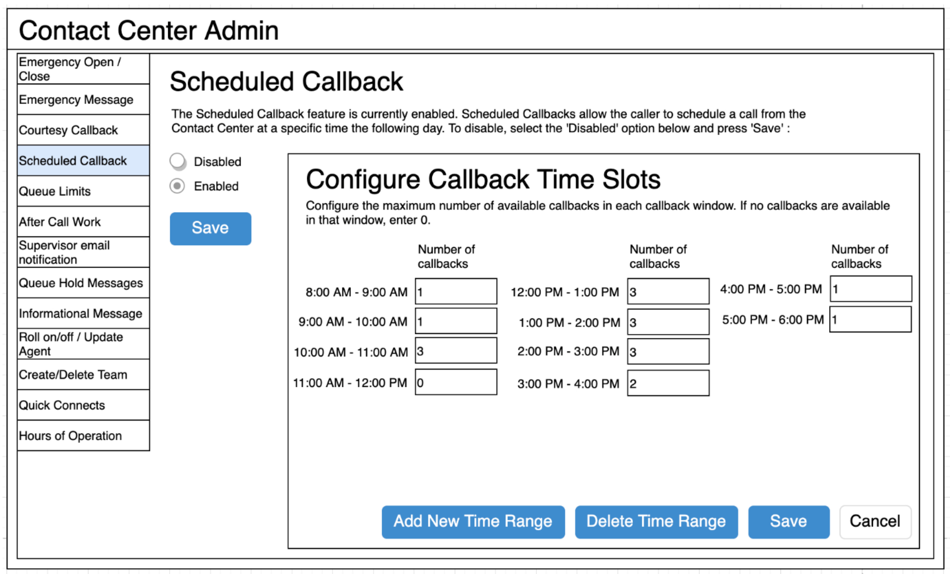


Figure 21 Scheduled Callback - new slot (8:00 AM to 9:00 AM) added before existing slots

2.6.2.11 Scheduled Callback – New time slot added before existing slots

1. Figure 21 shows a new time slot added, 8:00 AM to 9:00 AM, before the existing time slots.
2. The existing time slots are updated to display in ascending time order following the newly added time slot.

2.6.2.12 Scheduled Callback – Delete time slot - page mockup

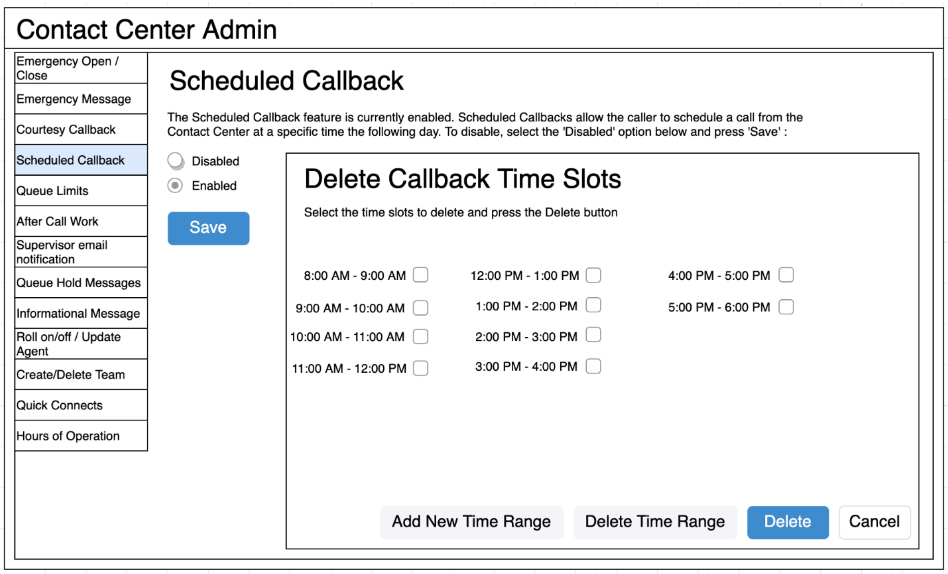


Figure 22 Scheduled Callback - delete callback time slots

2.6.2.13 Scheduled Callback – Delete time slot

1. If the user presses the ‘Delete Time Range’ button, the ‘Delete Callback Time Slots’ dialog is displayed (see Figure 21).
2. Checkboxes are displayed beside the configured time slots. (in place of the text entry fields).
3. If the user presses ‘Cancel’ no changes are made and the configured time slots are displayed.
4. The page flow for selecting time slots is described in the following section.

2.6.2.14 Scheduled Callback – Delete time slot, slots selected - page mockup

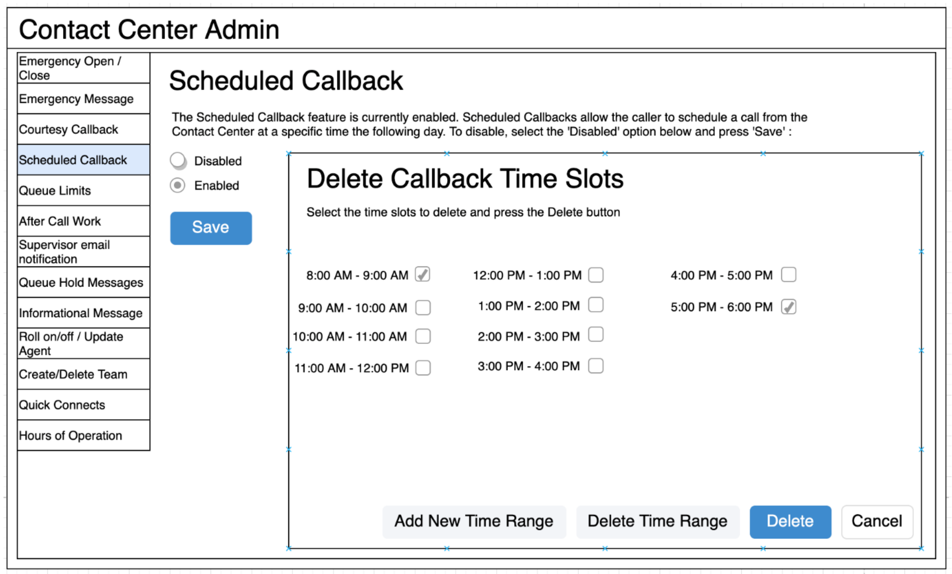


Figure 23 Scheduled Callback - delete time slots, slots selected

2.6.2.15 Scheduled Callback – Delete time slot, slots selected

1. The user clicks the checkboxes to select the time range(s) to delete.
2. One or more time range(s) can be selected.
3. In Figure 23, the 8:00 AM to 9:00 AM and 5:00 PM to 6:00 PM time slots are selected.
4. If the user presses 'Cancel', no changes are saved, and the currently configured time slots are re-displayed.
5. If the user presses 'Delete', a confirmation dialog is displayed, as shown in the following section.

2.6.2.16 Scheduled Callback – Delete time slot – delete confirmation page mockup

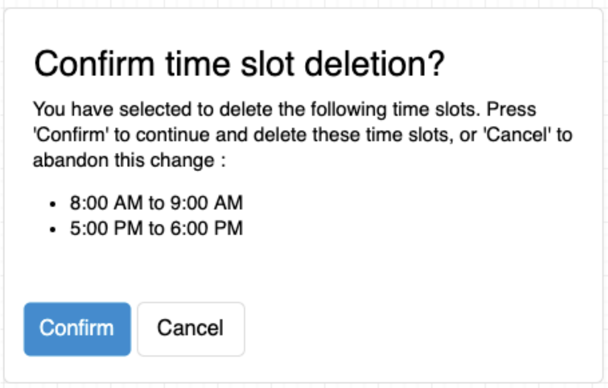


Figure 24 Scheduled Callback - Confirm time slot deletion

2.6.2.17 Scheduled Callback – Delete time slot – delete confirmation

1. If the user has selected time ranges to be deleted and presses the 'Delete' button, the confirmation dialog in Figure 24 is displayed.
2. The dialog lists the selected time ranges (for example, 8:00 AM to 9:00 AM and 5:00 PM to 6:00 PM).
3. If the user presses the 'Cancel' button, no changes are made, and the user is returned to the 'Delete Callback Time Slots page'.
4. If the user presses 'Confirm' the selected Callback Time Slots are deleted from the system. The user is returned to the 'Configure Callback Time Slots' page, and the page is updated to display the changes (see the following section).
5. Deletion of configured time slots is permanent. If the same time slots are required again at some point in the future, they need to be manually added (following page flow steps in section 2.6.2.7).

2.6.2.18 Scheduled Callback – After time slots deleted – page mockup

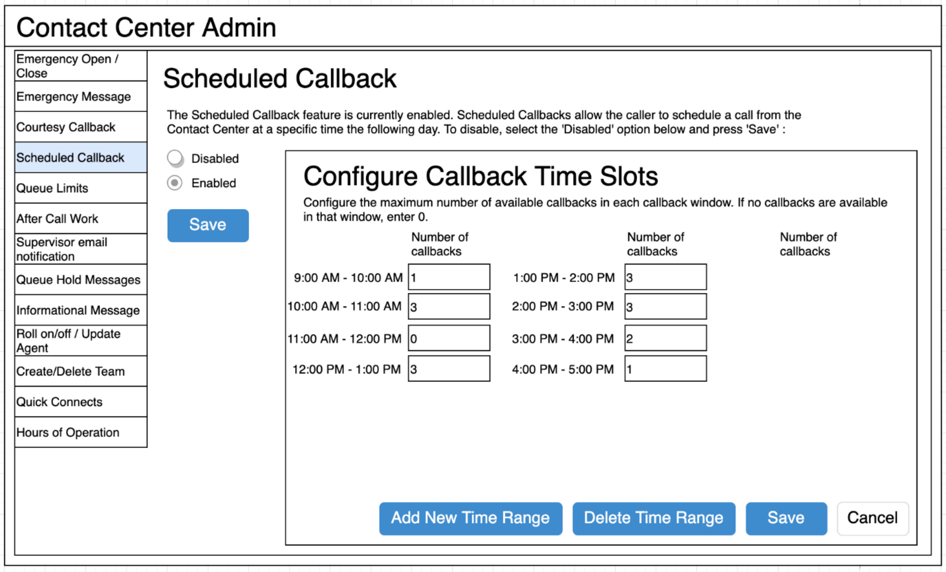


Figure 25 Scheduled Callback - after time slots deleted

2.6.2.19 Scheduled Callback – After time slots deleted

1. After the user confirms deletion of the selected time slots, the 'Configure Callback Time Slots' page is re-displayed.
2. The page mockup in Figure 24 shows the results of deleting timeslots 8:00 AM to 9:00 AM and 5:00 PM to 6:00 PM. These time slots are now no longer displayed. The remaining timeslots are rearranged to fill the available space on the page.

2.6.3 Assumptions

1. Implementation of the Scheduled Callback feature will be in SCR CA-229573
2. If callbacks are already scheduled in a time slot that is deleted, those callbacks will remain scheduled.
3. No new callbacks can be scheduled in a time slot after it is deleted.
4. This functionality is disabled for Regional Call Center (RCC) only Counties.

2.7 Queue Limits

2.7.1 Overview

The Queue Limits feature allows an Admin user to define the maximum number of calls that are allowed in each configured call queue.

Queue names are displayed in ascending alphabetical order. The page displays the queue names and maximum queue lengths for the currently defined queues for the current County. If there are more queues that can be displayed on one page, ‘Previous’ and ‘Next’ links are displayed to allow the user to page through the defined queues.

If a queue limit is changed while there are more calls in that queue than the new queue limit, the remaining calls in queue will remain in the queue. Any additional incoming calls will not be added to the queue until the number of calls in the queue is less than the new queue limit.

The page only allows the user to change the maximum queue length for currently defined queues. Note: Counties will need to contact the CalSAWS Project Team to add or remove queues or change the queue names.

2.7.2 Description of Changes

2.7.2.1 Queue Limits: Page mockup

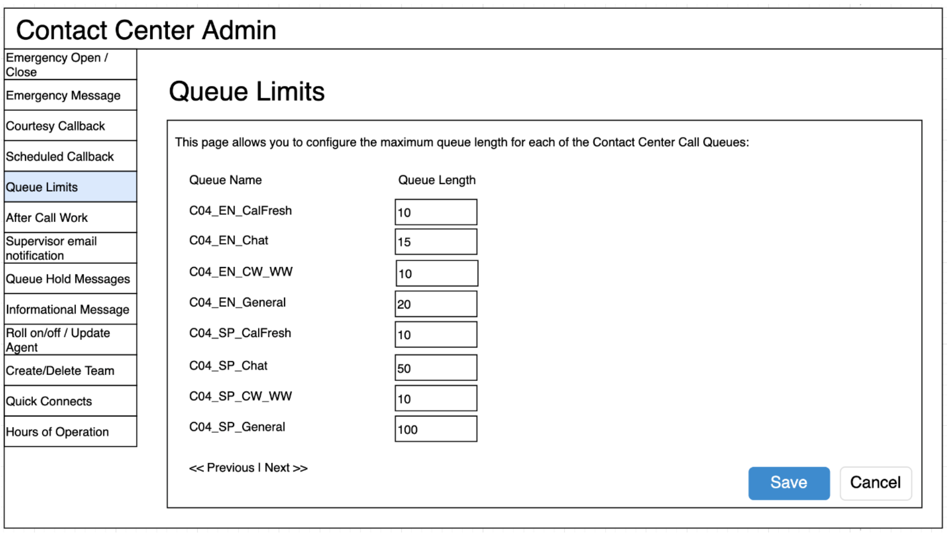


Figure 26 Queue Limits

2.7.2.2 Queue Limits

The Queue Limits page allows the user to configure the maximum number of calls per queue currently defined in the Contact Center.

1. If the Queue Limits configuration was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute has elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. Queue names are displayed in ascending alphabetical order.
3. If there are more queues than can be displayed on a single page, pagination links to page forward ("Next") and back ("previous") are displayed at the bottom of the list.
4. If the user is on the first page of queues, the "Previous" link is inactive.
5. If there are no more queues to display, the "Next" link is inactive.
6. User changes the queue limit for 1 or more number of queues currently displayed on the page. The entered value is an positive integer, less than 1000.

7. If no queue depth limit is required for a queue, the user can leave the value blank (this indicates no limit).
8. If the user attempts to navigate away from this page by paging forward/back or choosing another menu option, they are prompted to 'Save' or 'Cancel' their changes first – a dialog with the following message is displayed:

"You have unsaved changes on this page. You must save or cancel your changes before leaving the page"

9. If the user presses 'Save' any updated queue limit values are saved.
10. If the user presses 'Cancel' any changes are discarded and no actions are taken. The page is updated to show the original values.

2.8 After Call Work Limit

2.8.1 Overview

The After Call Work (ACW) Limit feature allows an Admin user to define the maximum number of minutes an Agent is allowed to perform After Call Work.

2.8.2 Description of Changes

2.8.2.1 After Call Work Limit – page mockups

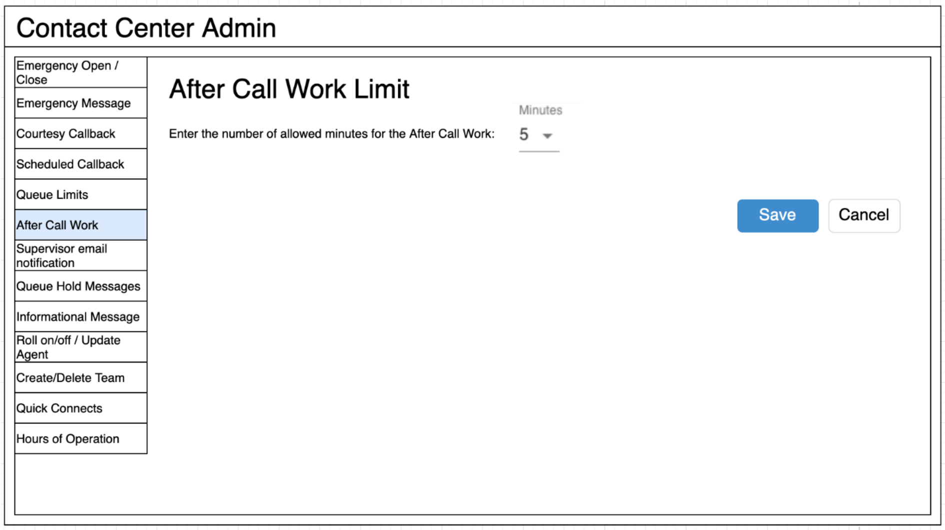


Figure 27 After Call Work Limit

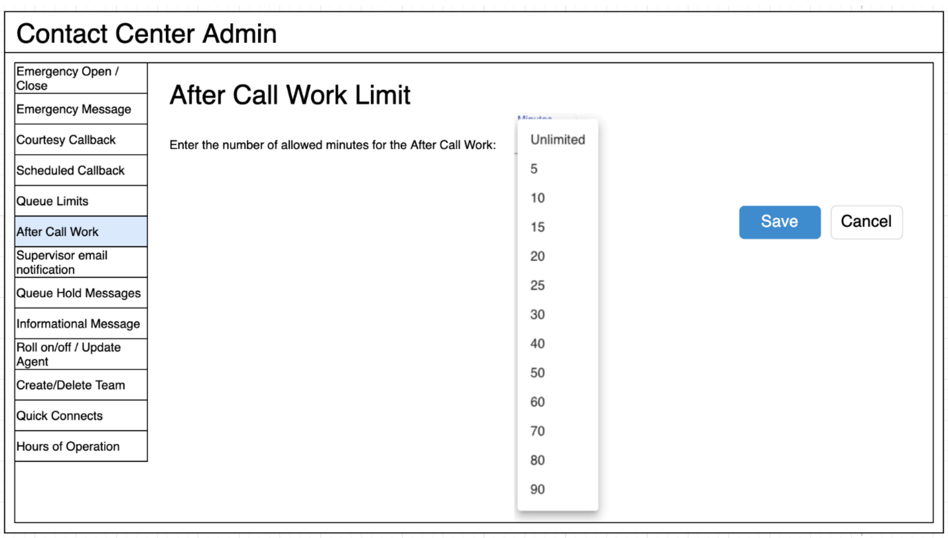


Figure 28 After Call Work Limit – dropdown list to select minutes

2.8.2.2 After Call Work Limit

1. If the After Call Work Limit configuration was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute as elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. The user selects a new value for the After Work Call Limit from a dropdown list. Valid options are displayed in the list from Unlimited to 90 minutes in the following increments:
    a. 5-minute increments from 5 to 30 minutes,
    b. 10 minute increments from 30 to 90 minutes.
3. If 'Unlimited' is selected, this means the After Call Work Limit check is disabled.
4. If user presses the 'Save' button, the changes are saved.
5. If the user presses the "Cancel' button, any change to the value is discarded, and the current configured value is displayed.

2.9 Roll-on/Roll-off / Update Agent

2.9.1 Overview

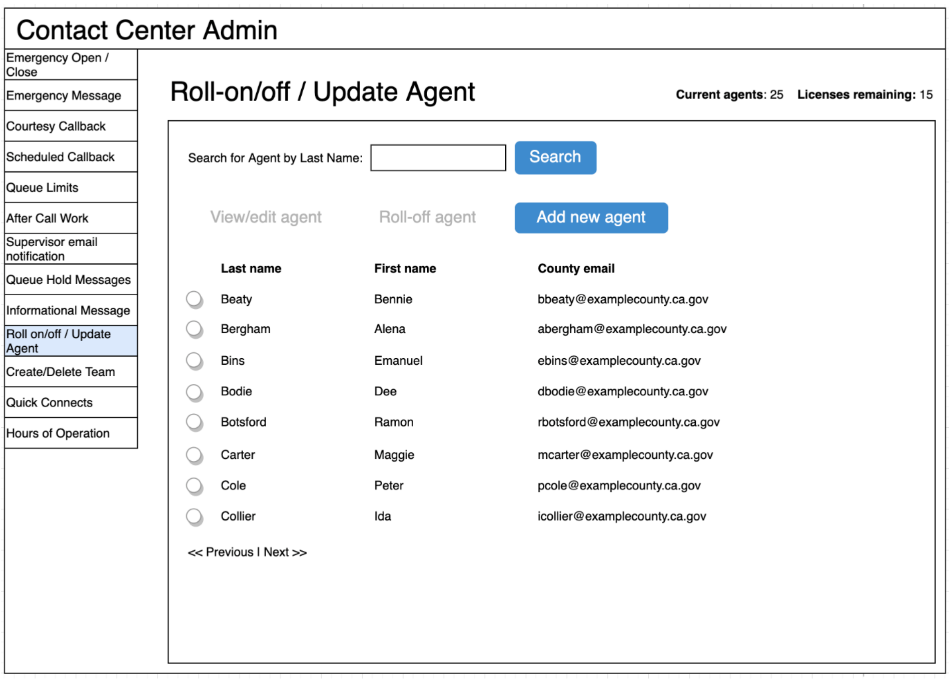
The Roll-on/Roll-off / Update Agent feature allows an Admin user to roll-on and roll-off Agents from the Contact Center. It also allows an Admin user to search for and update existing Agent details (for example, assigned Team and Routing Profile).

The Admin user can roll-on up to the maximum number of licenses available for the current county. The number of currently rolled-on Agents and the licenses remaining is displayed on the page.

When new Agents are created, existing integration with eGain and Calabrio will create new accounts in those systems when the new Agent logs on to the Contact Center for the first time.

2.9.2 Description of Changes

2.9.2.1 Roll-on/Roll-off page mockup



2.9.2.2 Roll-on/Roll-off

1. On entry to the Roll-on/Roll-off page, the list of current Agents is displayed in ascending alphabetical order by last name.
2. The number of currently rolled-on Agents is displayed in the top right of the page, along with the number of licenses remaining for the current County.
3. The page displays 10 Agents at a time. The user can paginate/browse through Agents by pressing the 'Previous' and 'Next' links.
4. If the user is already on the first page of Agents, the 'Previous' link is disabled.
5. If the user is on the last page of Agents, the 'Next' button is disabled.
6. If there are Agents before and after the current page, both 'Previous' and 'Next' links are enabled.
7. To search for a specific Agent, the user enters the Last Name of an Agent to search for and presses 'Search'.
8. Searching with 'like' criteria is supported, for example, if 'D' is entered, Agents with Last Name starting with 'D' are returned and displayed in ascending alphabetical order.

9. By default, no Agents are selected in the search results when the page is first displayed.
10. When an Agent is not selected, the 'View/Edit Agent' and 'Roll-off Agent' buttons are not enabled, only the 'Add new agent' button is enabled
11. If the user presses the 'Add New Agent' button, the 'Add New Agent' dialog is displayed – see the following page mockup and page flow.

2.9.2.3 Roll-on/Roll-off – Agent selected page mockup

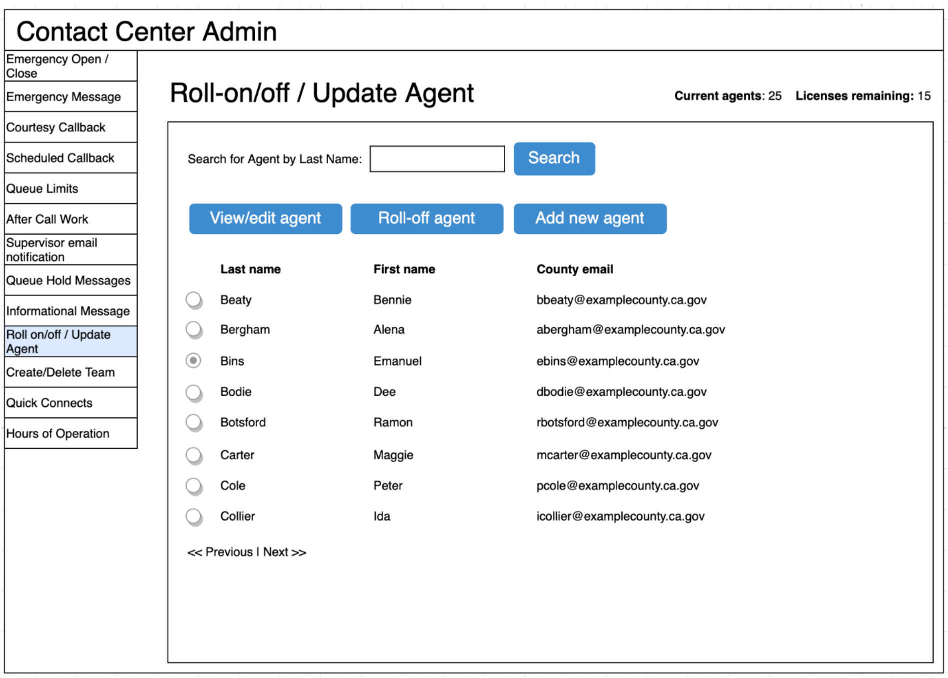


Figure 29 Roll-on / Roll-off / Update Agent

2.9.2.4 Roll-on/Roll-off – Agent selected

1. If the user selects an Agent by pressing the radio button beside an Agent Last Name, the 'View/Edit Agent' and 'Roll-off Agent' buttons are enabled.
2. If an Agent is selected and the user presses the 'View/Edit Agent' button, the 'View/Edit Agent' dialog is displayed – see the following page mockup and page flow.

3. If an Agent is selected and the user presses the 'Roll-off Agent' button, the 'Roll-off Agent' dialog is displayed – see the following page mockup and page flow.

2.9.2.5 Roll-on/Roll-off – View/Edit Agent page mockup

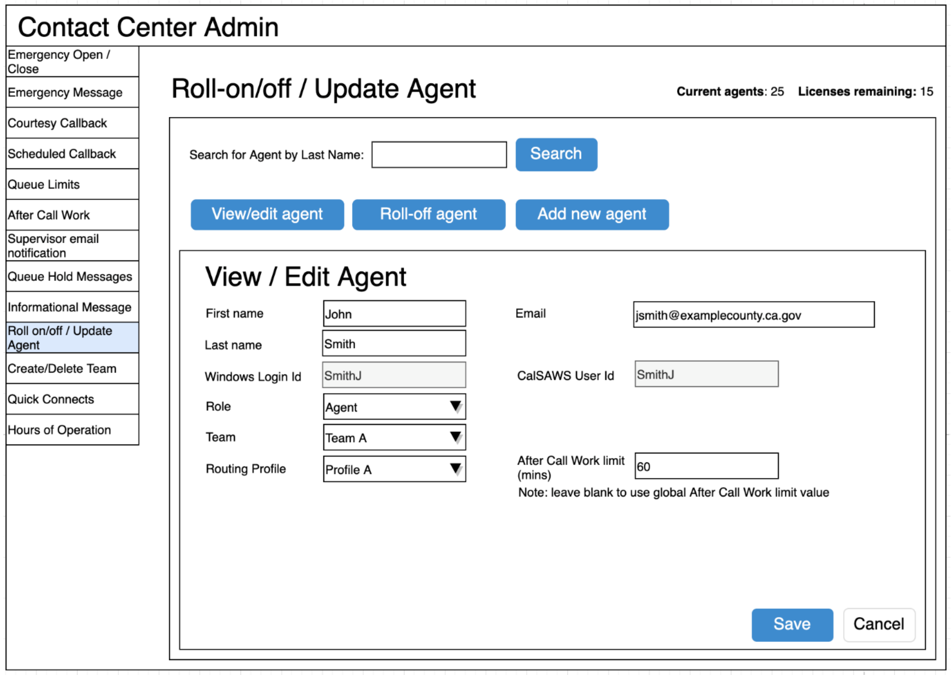


Figure 30 Roll-on / Roll-off - View/Edit Agent

2.9.2.6 Roll-on/Roll-off – View/Edit Agent

1. If the 'View/Edit Agent' button is pressed, the 'View/Edit Agent' dialog is displayed.
2. The user can edit the First Name, Last Name, Role, Team, Email, Routing Profile and After Call Work Limit fields.
3. The After Call Work Limit value specified here overrides the default/global value defined on the After Call Work page. If left blank the default/global value is used instead.
4. The Windows Login Id and CalSAWS User Id values cannot be changed, they are displayed as read-only fields. To change these values the Agent

must be rolled-off from the Contact Center, changed in the CalSAWS application, and then rolled-on to the Contact Center as a new user.

5. If the user presses the ‘Save’ button, the values are saved, and the ‘View/Edit Agent’ dialog is closed.
6. If the user presses the ‘Cancel’ button, the dialog is closed, and any changes are discarded.

2.9.2.7 Roll-on/Roll-off – Add Agent page mockup

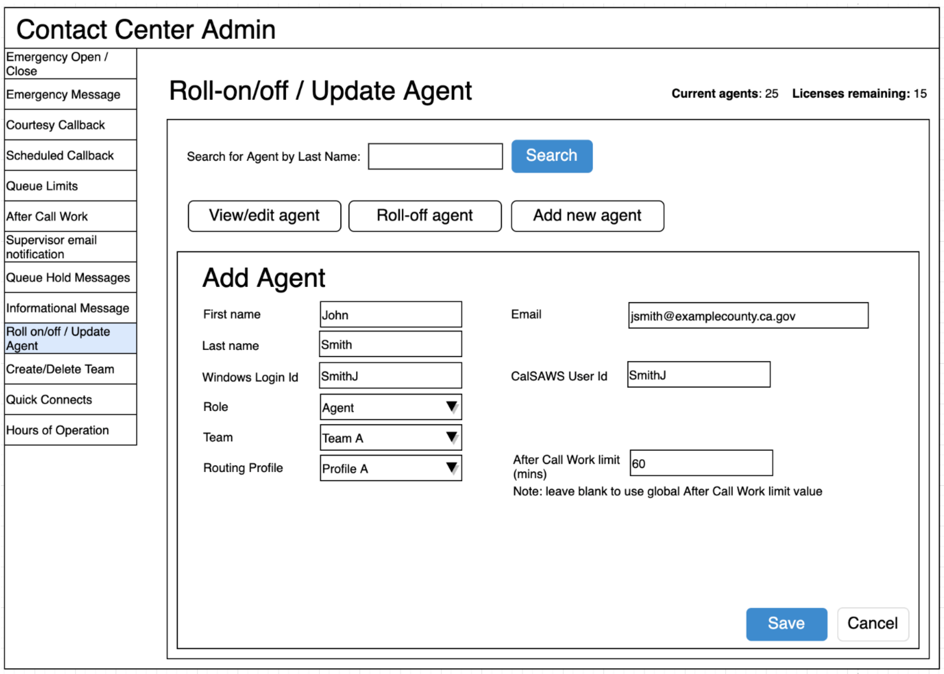


Figure 31 Roll-on / Roll-off - Add Agent

2.9.2.8 Roll-on/Roll-off – Add Agent

1. If the ‘Add New Agent’ button is pressed, the ‘Add New Agent’ dialog is displayed.
2. This page allows the user to roll-on new Agents up to the maximum number of licenses configured. The number of currently rolled-on Agents

and the number of licenses remaining is displayed in the top right of the page.

3. The user enters values for First Name, Last Name, Role (from a dropdown showing 'Admin' and 'Supervisor' values), Team (from a dropdown showing currently configured Teams) and Email fields.
4. The user enters the Agent's current Windows Login Id and CalSAWS User Id - these cannot be changed and must match their current User Id values.
5. The system validates that the entered CalSAWS User Id is an existing User Id and that this user has not already been rolled-on as a Contact Center Agent.
6. The user enters values for Routing Profile (from a dropdown showing currently configured Routing Profiles), and After Call Work limit (in minutes).
7. The After Call Work Limit value specified here overrides the default/global value defined on the After Call Work page. If left blank the default/global value is used.
8. If the user presses the 'Save' button, the new Agent is created in the following applications:
    a. Contact Center Cloud
    b. Contact Center WFM
    c. Contact Center QA
    d. Contact Center Reporting

2.9.2.9 Roll-on/Roll-off – Roll-off Agent page mockup

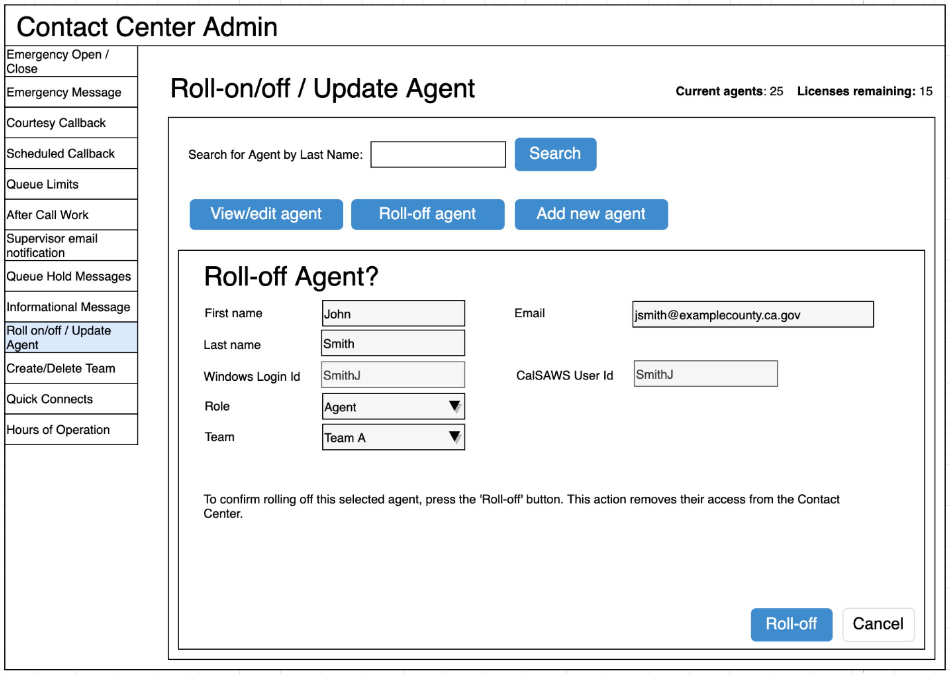


Figure 32 Roll-on/Roll-off - Delete Agent

2.9.2.10 Roll-on/Roll-off – Roll-off Agent

1. If the user selects an Agent and presses the ‘Roll-off Agent’ button, the ‘Roll-off Agent’ dialog is displayed (Figure 28).
2. The following fields are displayed as read-only to identify the Agent:
    a. First name / Last Name
    b. Email
    c. Windows Logon Id
    d. CalSAWS User Id
    e. Role
    f. Team
3. If the user presses the ‘Roll-off’ button, the Agent is removed from the Contact Center. After this point the removed user will no longer have access to the Contact Center, but any prior access and roles within the CalSAWS system remain unchanged.
4. The Roll-off Agent change is permanent. If access for an Agent needs to be restored, the Admin needs to repeat the Roll-on Agent steps as

described in section 2.9.28. Additionally, the Roll-off Agent action has the following impacts to agent and call history data reporting:

   a. Agent data is no longer available for reporting in eGain by County users. The data can be restored by CalSAWS Contact Center operations team if needed.
   b. Agent is marked as inactive and data is no longer available to Calabrio. If data is required for an inactive agent, the agent can be moved back to Active status by CalSAWS Contact Center operations team if needed.

5. If the user presses the 'Cancel' button, no changes are made. The 'Roll-off Agent' dialog is closed, and the user is returned to the main 'Roll-on / Roll-off / Update Agent' page as shown in Figure 28.

2.10 Emergency Message

2.10.1 Overview

This page allows the user to create, edit, delete and select the current Emergency Message for their County. The user can define up to 10 Emergency Messages. The currently selected message is the chosen message that plays while the Contact Center is in Emergency Closure mode (see section 2.3).

If there is no currently selected Emergency Message, a default message will play.

The default message cannot be changed or deleted and is only used when no other Emergency Messages are defined, and/or none of the custom messages are currently selected as the current message for playback during an Emergency Closure.

The default language for each message is English. Each message can optionally have translated versions of the message in any of the supported languages. The caller's preferred language determines which language version is played. If a translated version for the caller's preferred language is not available then the default English message is played.

The following sections describe how the Emergency Messages are created and maintained.

2.10.2 Description of Changes

2.10.2.1 Emergency Message – page mockup

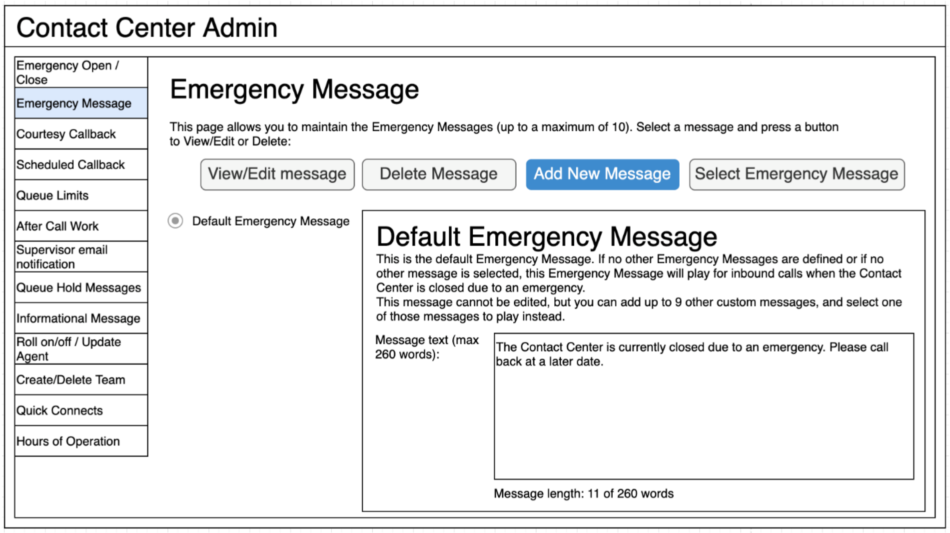


Figure 33 Emergency Message - no messages defined

2.10.2.2 Emergency Message – No messages defined

1. When there are no custom Emergency Messages defined, the only enabled button is 'Add New Message'.
2. The default Emergency Message is selected and is shown as the current Emergency Message.
3. If the Contact Center is closed using the Emergency Open/Close feature when there are no other Emergency Messaged defined, the default message is played:

"The Contact Center is currently closed due to an emergency. Please call back at a later date."

4. The default Emergency Message cannot be deleted or edited.
5. If user presses 'Add New Message', see following section for page mockup and page flow.

2.10.2.3 Emergency Message – Messages defined, no message selected page mockup

Figure 34 Emergency Message - messages defined, no selected message

2.10.2.4 Emergency Message – Messages defined

1. Up to a maximum of 10 messages can be defined. When less than 10 messages are currently defined, the 'Add new message' button is enabled.
2. The currently configured Emergency Message is highlighted.
3. When the user selects a message by pressing a radio button, the 'Edit/View Message', 'Delete Message', and 'Select Emergency Message' buttons are enabled.
4. If no message is selected, these buttons are not enabled.

2.10.2.5 Emergency Message – Messages defined, message selected page mockup

Figure 35 Emergency Message - messages defined and message selected

2.10.2.6 Emergency Message – Messages defined; message selected

In this example, a new message, 'This is a message name 3' is selected. When a message is selected the relevant buttons are enabled to show valid options.

To View/edit a message:

1. User selects a message by pressing the radio button next to the message name and presses the 'View/Edit Message' button. See next section for page mockup and flow.

To Delete a message:

1. User selects a message by pressing the radio button next to the message name and presses the 'Delete Message' button. See next section for page mockup and flow.

To Add a message:

1. User presses the 'Add New Message' button. See next section for page mockup and flow.

To select/change the currently configured Emergency Message:

1. User selects a message by pressing the radio button next to the message name and presses the 'Select Emergency Message' button. See next section for page mockup and flow.

2.10.2.7 Emergency Message – View/Edit Message page mockup : English selected language

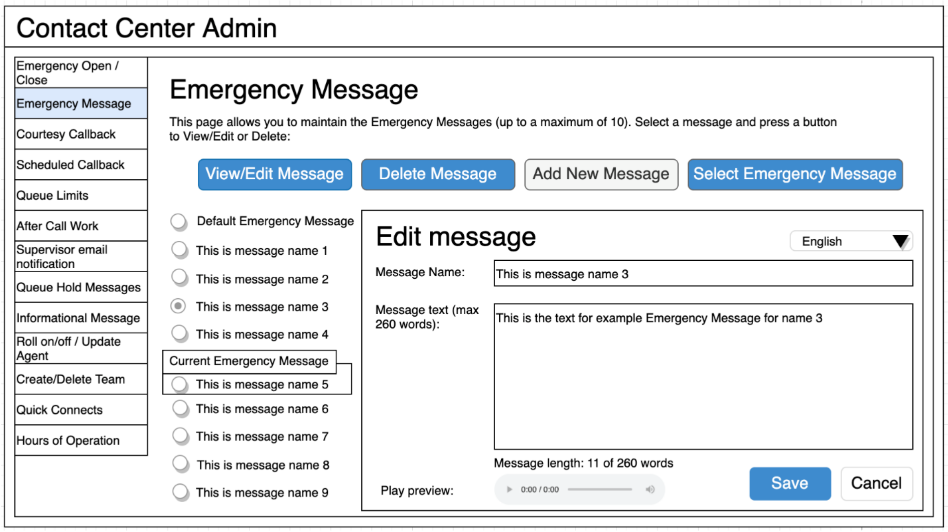


Figure 36 Emergency Message - view/edit message

2.10.2.8 Emergency Message – View/Edit Message page mockup : Language selection dropdown

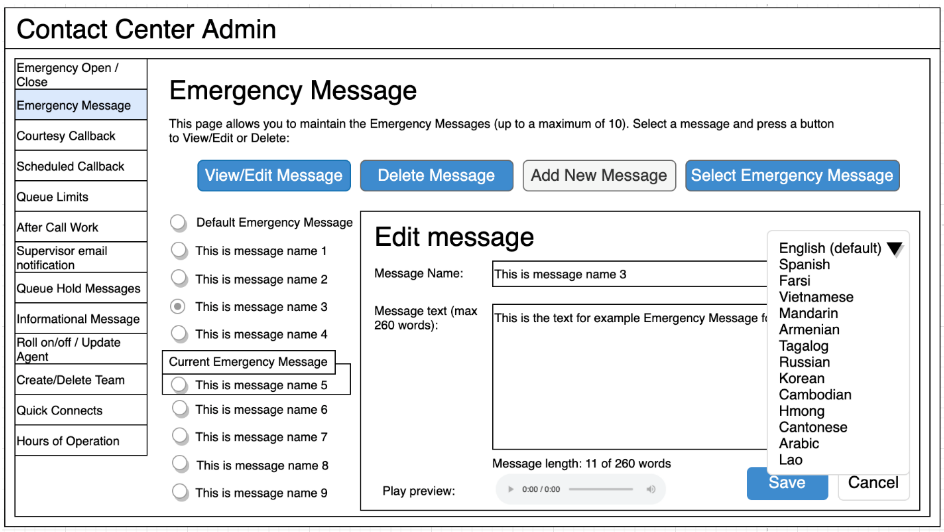


Figure 37 Emergency Message - Language selection dropdown

2.10.2.9 Emergency Message – View/Edit Message

1. User selects an Emergency Message by pressing the radio button next to the message they want to view or edit and presses the 'View/Edit Message' button. The Edit Message dialog is displayed.
2. User changes the Message Name, up to 60 alphanumeric characters.
3. User changes the Message Text, up to 260 words. The current count of entered words in the message is displayed as the user types, for example, "Message length: 11 of 260 words". The user is not allowed to enter more than 260 words.
4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
    a. English (default)
    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

6. Note that the 'Default Emergency Message' cannot be deleted or modified. If the user selects the 'Default Emergency Message' in the list and presses the 'View/Edit' button, the View/Edit dialog is display showing the default message text, but the 'Save' button is disabled.
7. To hear an audio preview of the message text, the user can press the 'play' button on the media control underneath the message text field. This will playback the audio for the entered text.
8. If the user presses "Save", text changes for any of the selected languages are saved and the dialog closes.
9. If the user presses "Cancel", the changes are discarded and the dialog closes.

2.10.2.10 Emergency Message – Delete Message page mockup

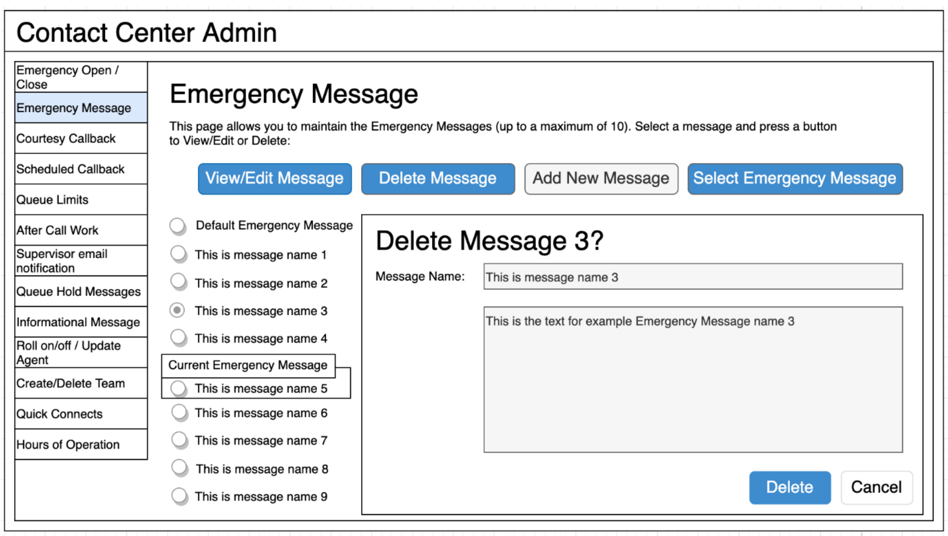


Figure 38 Emergency Message - delete message

2.10.2.11 Emergency Message – Delete Message

1. User selects an Emergency Message by pressing the radio button next to the message they want to delete and presses the 'Delete Message' button. The Delete Message dialog is displayed.
2. If the user presses the 'Delete' button the selected message is deleted. The Delete Message dialog closes. The list of configured messages is updated to display the remaining messages.
3. Deleting an Emergency Message is permanent. To add back the same message, the Admin user adds a new message following the page flow in section 2.10.2.12.
4. When a message is deleted, all language translations for that selected message are deleted at the same time.
5. Note that the 'Default Emergency Message' cannot be deleted or modified. If the user selects the 'Default Emergency Message' in the list and presses the 'Delete message' button, a warning dialog is displayed with the following error message:

   "The Default Emergency Message cannot be deleted or modified. Please select one of the other custom messages."

6. If the user presses the 'Cancel' button the Delete Message dialog is closed and no action is taken.

2.10.2.12 Emergency Message – Add New Message page mockup

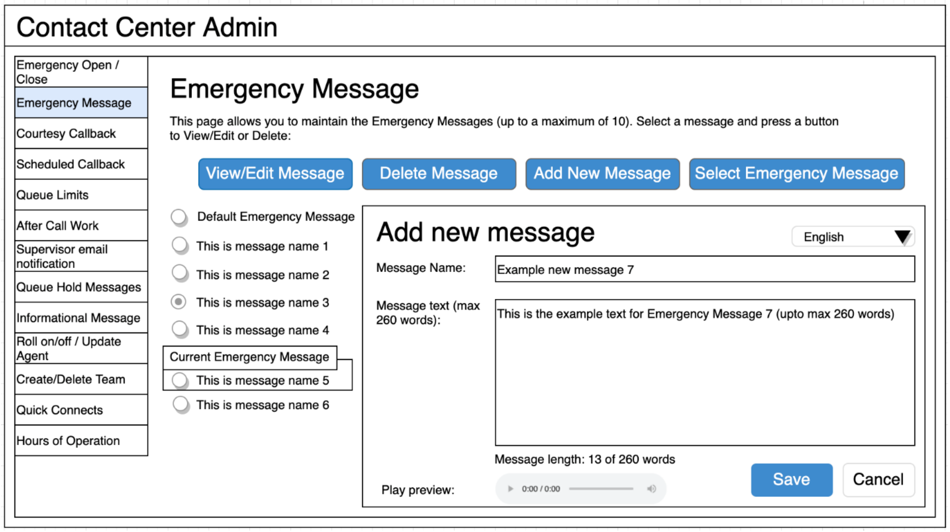


Figure 39 Emergency Message - Add new message

2.10.2.13 Emergency Message – Add New Message

If there are less than 10 Emergency Messages currently defined, the user can press the 'Add New Message' button to create a new message.

1. User presses the 'Add New Message' button. The Add New Message dialog is displayed.
2. The user enters the Message Name, up to 60 alphanumeric characters.
3. The user enters the Message Text, up to 260 words. The current count of entered words in the message is displayed as the user types, for example, "Message length: 13 of 260 words". The user is not allowed to enter more than 260 words.
4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
    a. English (default)
    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

6. To hear an audio preview of the message text, the user can press the 'play' button on the media control underneath the message text field. This will playback the audio for the entered text.
7. If the user presses "Save", the new Message is saved and the dialog closes. The displayed list of messages is updated to show the new Message Name for the newly added message.
8. If the user presses "Cancel", the changes are discarded and the dialog closes.

2.10.2.14 Emergency Message – Select Emergency Message page mockup

Figure 40 Emergency Message - Select message

2.10.2.15 Emergency Message – Select Emergency Message

The user can only select a new Emergency Message if there is at least 1 message defined. The 'Select Emergency Message' button is enabled if there is at least 1 message defined.

If there are no Emergency Messages configured or if a message has not yet been selected as the current Emergency Message, a default message is played when the Contact Center is closed using the Emergency Open/Close feature:

"The Contact Center is currently closed due to an emergency. Please call back later."

This default message cannot be changed and is only used in the scenario as described above.

To select a current Emergency Message:

1. If the current Emergency Message was last changed more than 1 minute ago, the User is allowed to select a new message. If less than 1 minute has elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. User selects one of the configured Emergency Messages by pressing the radio button beside a message.
3. If the user selects the currently configured Emergency Message, then 'Select Emergency Message' button is disabled.
4. If the user selects a different message than the currently configured Emergency Message, the 'Select Emergency Message' button is enabled.
5. User presses the 'Select Emergency Message' button and the Select Emergency Message dialog is displayed.
6. The dialog shows the currently configured Emergency Message and the new message selected by the user. The dialog shows two buttons, 'Confirm' and 'Cancel'.
7. If the user presses the 'Confirm' button, the selected message is configured as the new Emergency Message. The Select Emergency Message dialog is closed, the list of configured messages is updated to show the newly selected Emergency Message.
8. If the user presses the 'Cancel' button the Select Emergency Message dialog is closed and there is no change to the currently configured Emergency Message.

2.10.3 Assumptions

1. Only 1 message can be selected as the current Emergency Message.

2. The emergency message will play following the customer requesting to speak to a worker/agent when the call center is closed due to emergency. The customer will not be transferred into a queue.
3. This functionality will be disabled for Regional Call Center (RCC) only Counties.

2.11 Informational Message

2.11.1 Overview

The Informational Message feature allows an Admin user to maintain the Informational Messages. This page allows the Admin user to view and edit messages, delete messages, add new messages, and select the current Informational Message.

The configuration page allows the Admin user to select one Informational Message as the currently enabled message.

The default language for each message is English. Each message can optionally have translated versions of the message in any of the supported languages. The caller's preferred language determines which language version is played. If a translated version for the caller's preferred language is not available then the default English message is played.

2.11.2 Description of Changes

2.11.2.1 Informational Message – page mockup

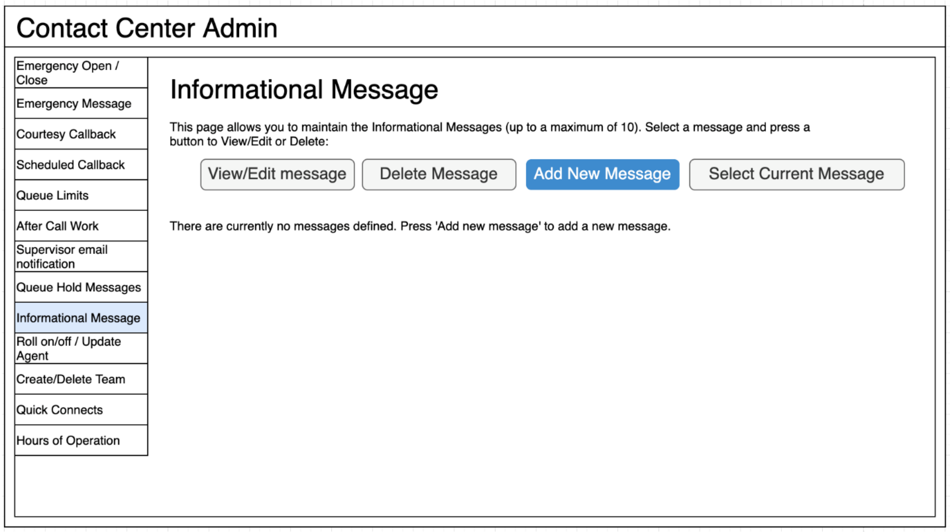


Figure 41 Informational Message - no messages defined

2.11.2.2 Informational Message – No messages defined

1. When there are no Informational Messages defined, the only enabled button is 'Add New Message'.
2. If user presses 'Add New Message', see following section for page mockup and page flow.

2.11.2.3 Informational Message – Messages defined, no message selected page mockup

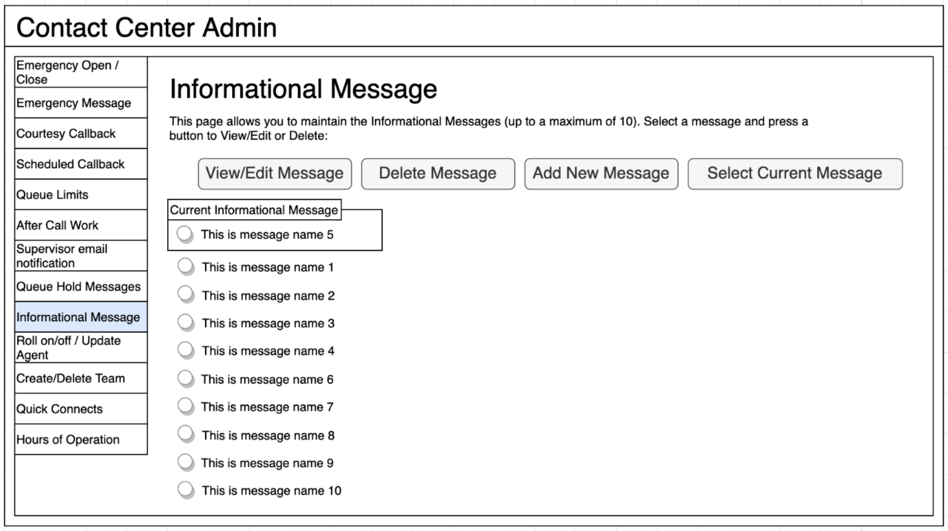


Figure 42 Informational Message - no message selected

2.11.2.4 Informational Message – Messages defined

1. Up to a maximum of 10 messages can be defined. When less than 10 messages are currently defined, the 'Add new message' button is enabled.
2. The currently configured Informational Message is highlighted.
3. When the user selects a message by pressing a radio button, the 'Edit/View Message', 'Delete Message', and 'Select Current Message' buttons are enabled.
4. If no message is selected, these buttons are not enabled.

2.11.2.5 Informational Message – Messages defined, message selected page mockup

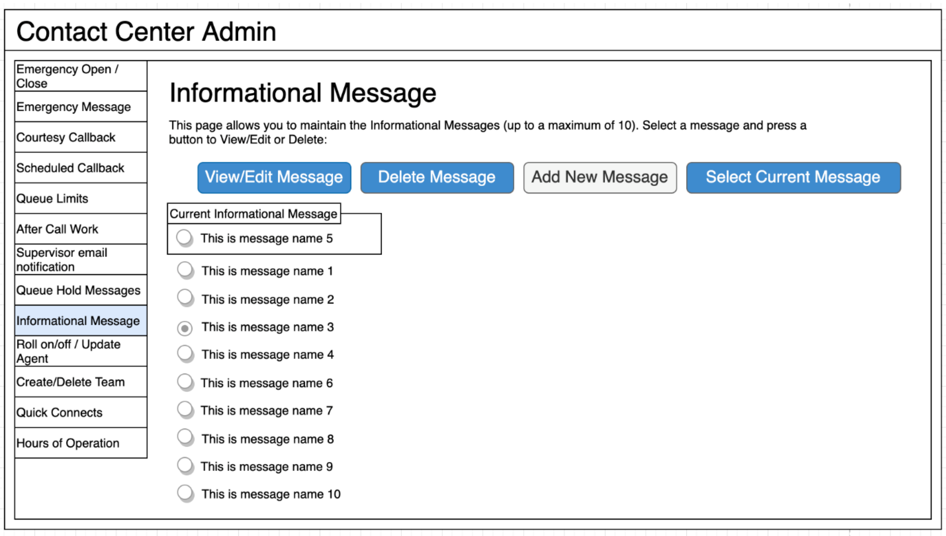


Figure 43 Informational Message - message selected

2.11.2.6 Informational Message – Messages defined, message selected

In this example, a new message, 'This is a message name 3' is selected. When a message is selected the relevant buttons are enabled to show valid options.
To View/edit a message:

1. User selects a message by pressing the radio button next to the message, and presses the 'View/edit message' button. See next section for page mockup and flow.

To Delete a message:

1. User selects a message by pressing the radio button next to the message, and presses the 'Delete message' button. See next section for page mockup and flow.

To Add a message:

1. User presses the 'Add New Message' button. See next section for page mockup and flow.

To select/change the currently configured Informational Message:

1. User selects a message by pressing the radio button next to the message, and presses the 'Select Current Message' button. See next section for page mockup and flow.

2.11.2.7 Informational Message – View/Edit Message page mockup: selected language: English

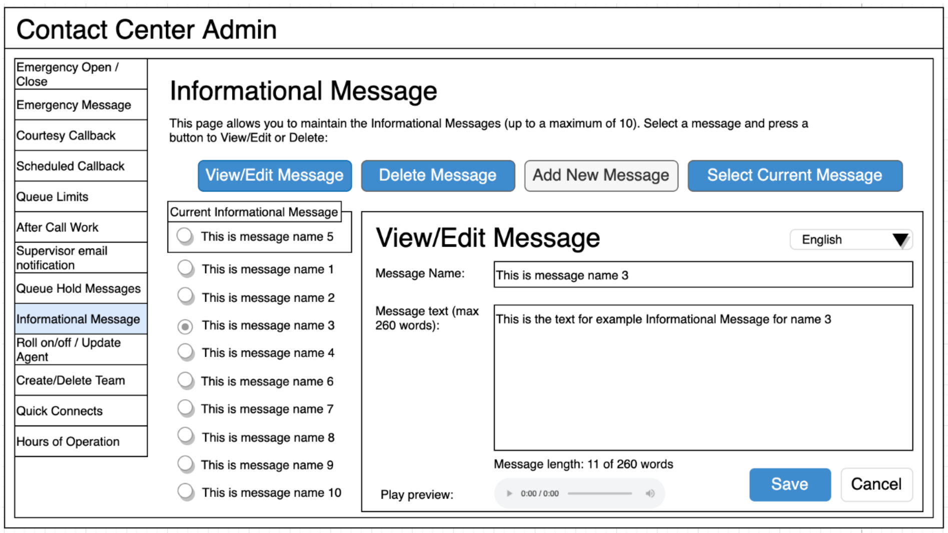


Figure 44 Informational Message - View/Edit Message

2.11.2.8 Informational Message – View/Edit Message page mockup: Language selection dropdown

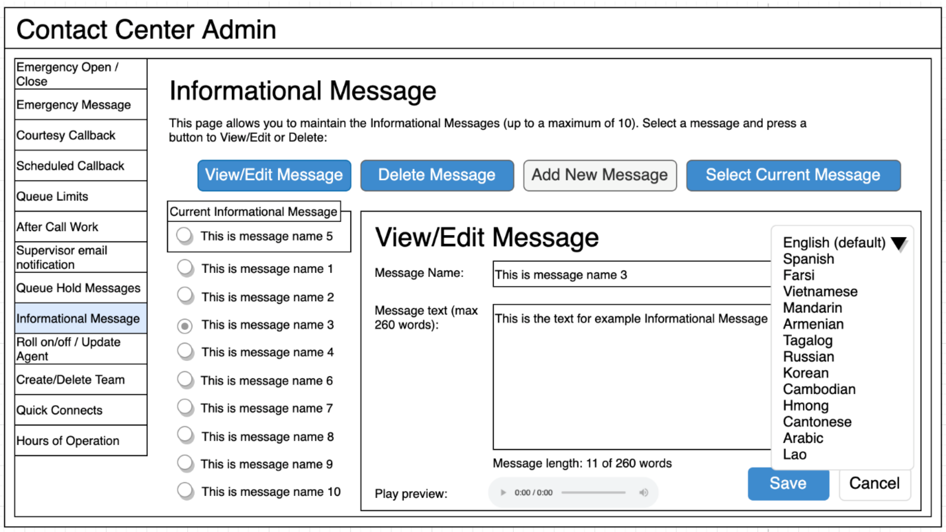


Figure 45 Informational Message - Language selection

2.11.2.9 Informational Message – View/Edit Message page mockup: selected language: Spanish

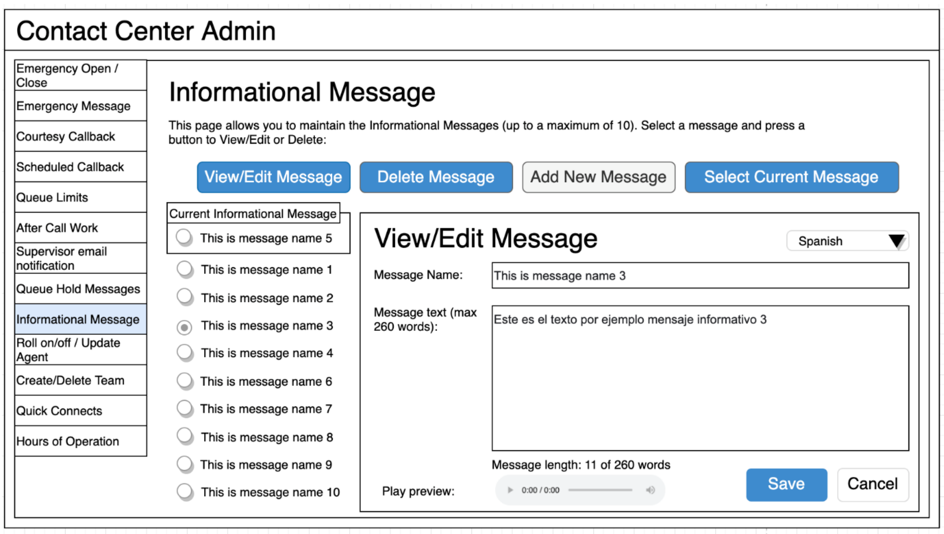


Figure 46 Informational Message - Spanish language

2.11.2.10 Informational Message – View/Edit Message

1. User selects an Informational Message by pressing the radio button next to the message to view or edit and presses the 'View/Edit Message' button. The View/Edit Message dialog is displayed.
2. User changes the Message Name, up to 60 alphanumeric characters.
3. User changes the Message Text, up to 260 words. The current count of entered words in the message is displayed as the user types, for example, "Message length: 11 of 260 words". The user is not allowed to enter more than 260 words.
4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
    a. English (default)
    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

6. To hear an audio preview of the message text, the user can press the 'play' button on the media control underneath the message text field. This will playback the audio for the entered text.
7. If the user presses "Save", changes to the text for any of the languages selected from the Languages dropdown are saved and the dialog closes.
8. If the user presses "Cancel", all changes are discarded and the dialog closes.

2.11.2.11 Informational Message – Delete Message page mockup

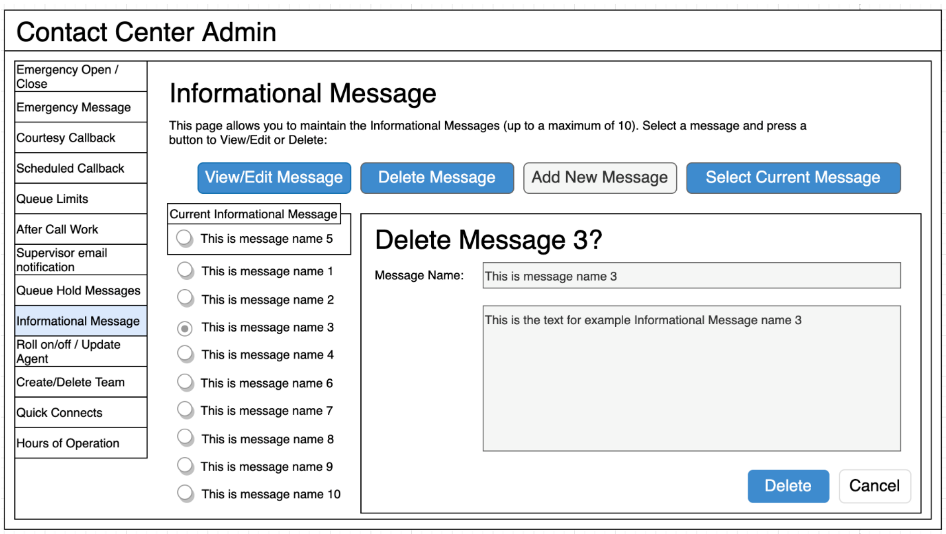


Figure 47 Informational Message - Delete Message

2.11.2.12 Informational Message – Delete Message

1. User selects an Informational Message by pressing the radio button next to the message they want to delete and presses the 'Delete Message' button. The Delete Message dialog is displayed.

2. If the user presses the 'Delete' button the selected message is deleted. The Delete Message dialog closes. The list of configured messages is updated to display the remaining messages.
3. Deleting an Informational Message is permanent. To add back a message the Admin user creates a new message following the page flow in section 2.11.2.12.
4. If the user presses the 'Cancel' button the Delete Message dialog is closed and no action is taken.

2.11.2.13 Informational Message – Add New Message page mockup

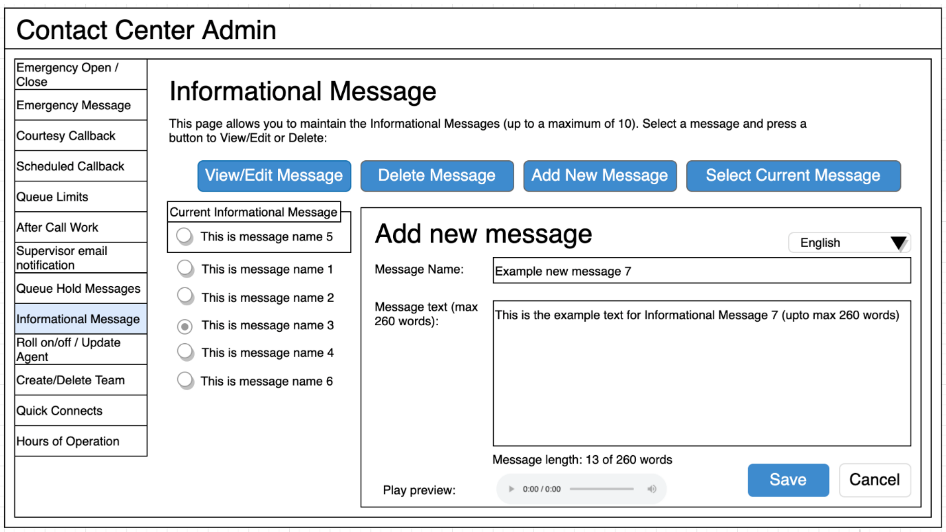


Figure 48 Informational Message - Add New Message

2.11.2.14 Informational Message – Add New Message

If there are less than 10 Informational Messages currently defined, the user can press the 'Add New Message' button to create a new message.

1. User presses the 'Add New Message' button. The Add New Message dialog is displayed.
2. The user enters the Message Name, up to 60 alphanumeric characters.
3. The user enters the Message Text, up to 260 words. The current count of entered words in the message is displayed as the user types, for example, "Message length: 13 of 260 words". The user is not allowed to enter more than 260 words.

4. The English version of the message is required.
5. The user can optionally enter translated versions of the text for any of the supported languages using the language dropdown menu. The supported languages are:
    a. English (default)
    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
6. To hear an audio preview of the message text, the user can press the ‘play’ button on the media control underneath the message text field. This will playback the audio for the entered text.
7. If the user presses “Save”, the new Message is saved and the dialog closes. The displayed list of messages is updated to show the new Message Name for the newly added message.
8. If the user presses “Cancel”, the changes are discarded and the dialog closes.

2.11.2.15 Informational Message – Select Informational Message page mockup

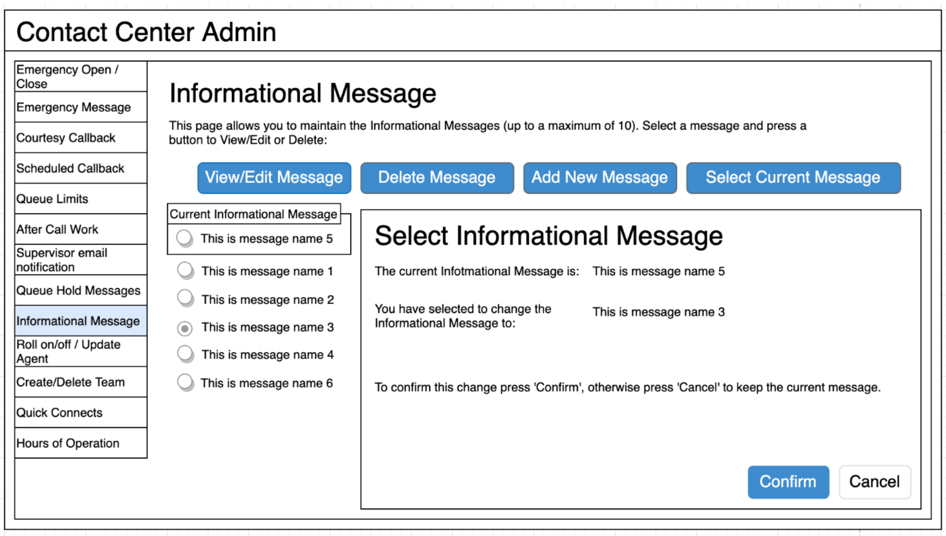


Figure 49 Informational Message - Select Message

2.11.2.16 Informational Message – Select Informational Message

The user can only select a new Informational Message if there is at least 1 configured message. The 'Select Current Message' button is only enabled if there is at least 1 message defined.

1. If the current Informational Message was last changed more than 1 minute ago, the User is allowed to make new changes. If less than 1 minute has elapsed since the last configuration change (Cool-down period), display a dialog informing the user that they need to wait 1 minute before making additional changes (as shown in Section 2.2).
2. User selects one of the configured Informational Messages by pressing the radio button beside a message.
3. If the user selects the currently configured Informational Message, then 'Select Current Message' button is disabled.
4. If the user selects a different message than the currently configured Informational Message, the 'Select Informational Message' button is enabled.
5. User presses the 'Select Current Message' button and the Select Information Message dialog is displayed.

6. The dialog shows the currently configured Informational Message and the new message selected by the user. The dialog shows two buttons, 'Confirm' and 'Cancel'.
7. If the user presses the 'Confirm' button, the selected message is configured as the new Informational Message. The Select Informational Message dialog is closed, the list of configured messages is updated to show the newly selected Informational Message.
8. If the user presses the 'Cancel' button the Select Informational Message dialog is closed and there is no change to the currently configured Informational Message.

2.11.2.17 Assumptions

1. The informational message will play following language selection in the counties inbound IVR.
2. If there are no informational messages defined and/or there is no currently selected message, no informational messages are played during calls.
3. If a message is deleted, all language versions of that message (e.g. English and Spanish) are deleted at the same time.
4. If an alternative language version for a message is not needed, leaving the message text blank means there is no version of the message in that language.
5. This functionality will be disabled for Regional Call Center (RCC) only Counties.

2.12 Supervisor Email Notification

2.12.1 Overview

The Supervisor Email notification page allows an Admin user to define thresholds and notifications for Contact Center metrics. If the threshold is exceeded for a specific metric, the system sends a notification email to the specified email address(es).

The Admin user can turn on or off all notifications, or enable any combination of the notifications that apply for their County.

Enabling or disabling any of the notifications is immediately changed within the system.

2.12.2 Description of Changes

2.12.2.1 Supervisor Email Notification – all notifications off, page mockup

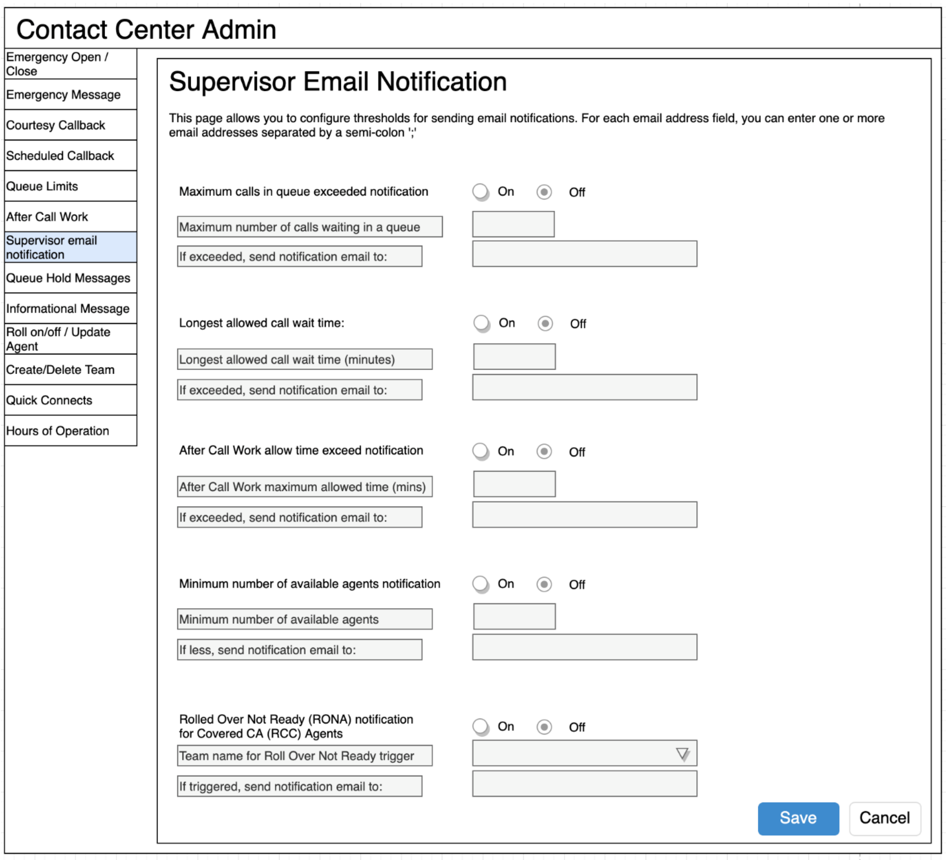


Figure 50 Supervisor Email Notification - Notifications Off

2.12.2.2 Supervisor Email Notification – all notifications off

1. User opens the Supervisor Email Notification page.
2. Configurable values for each notification are disabled unless the notification is enabled.

3. If user turns ‘on’ a notification, the configurable values for that notification are enabled. See details in following page mock ups and page flows.

2.12.2.3 Supervisor Email Notification – selective notifications on, page mockup

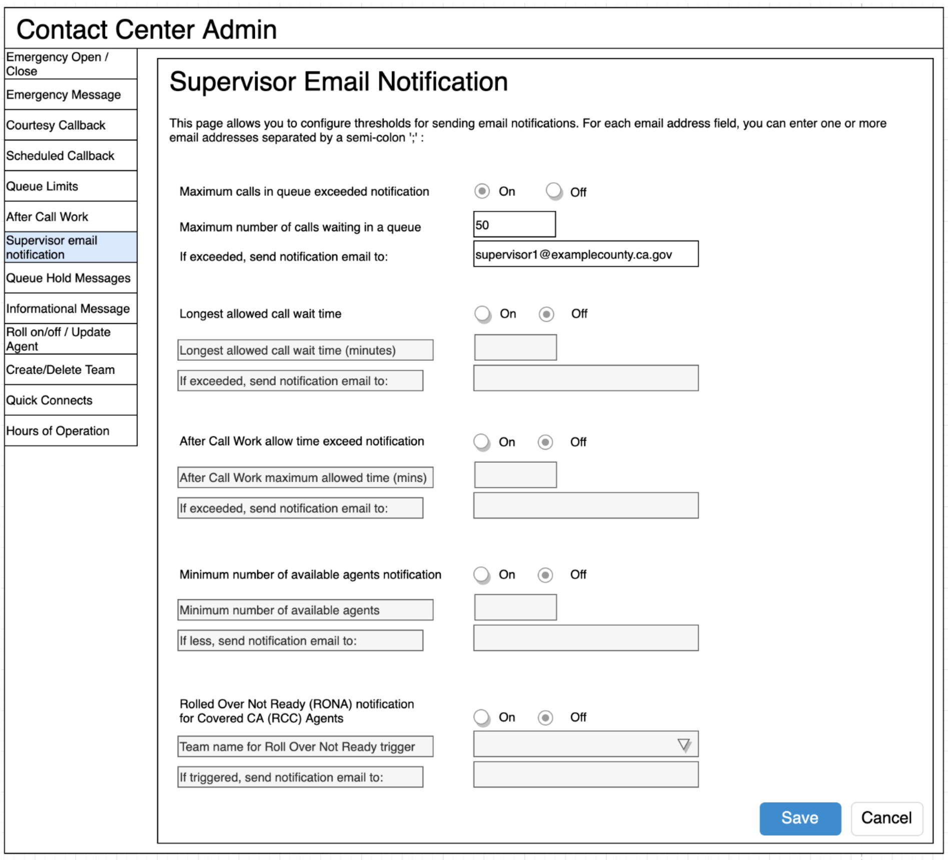


Figure 51 Supervisor Email Notification - one enabled notification

2.12.2.4 Supervisor Email Notification – selective notifications on

1. When the user enables a notification option, the configurable values are enabled.

2. The page mockup shows the 'Maximum calls in queue' notification is enabled and the 'Maximum number of calls waiting in queue' and 'If exceeded, send notification to' entry fields are enabled.
3. User enters values for 'Maximum calls in queue' and 'If exceeded, send notification to' email field. The user can enter multiple email addresses separated by a semi-colon (';'). For example: *admin1@county1.ca.gov; admin2@county1.ca.gov*

4. If other notifications are enabled, valid values and ranges are defined in the following table "Valid values for notification options"
5. If user presses 'Save', the changed values are saved.
6. If the user presses 'Cancel', all changed values are discarded. The currently configured values for enabled notifications are displayed. No actions are taken.

2.12.2.5 Supervisor Email Notification – Valid values for notification options

Configurable option / Email trigger threshold	Email trigger event	Unit type / value	Minimum valid value	Maximum valid value
Maximum number of calls waiting in queue	Number of calls in queue exceeds the specified value	Integer	1	500
Longest allowed call wait time	Any queue waiting in queue exceeds the specified value	Integer, minutes	1	480
After Call Work maximum allowed time	Any agent spending longer than specified value on 'After Call Work'	Integer, minutes	5	480
Minimum number of available agents	When number of available agents is less than the	Integer	1	500

	specified value			
Covered CA (RCC) Agents that is enabled for monitoring the 'Rolled Over Not Ready' state	If Covered CA agent in team becomes 'Rolled Over Not Ready' for then email notification is sent	Name of team	n/a	n/a

2.12.2.6 Supervisor Email Notification – all notifications enabled, page mockup

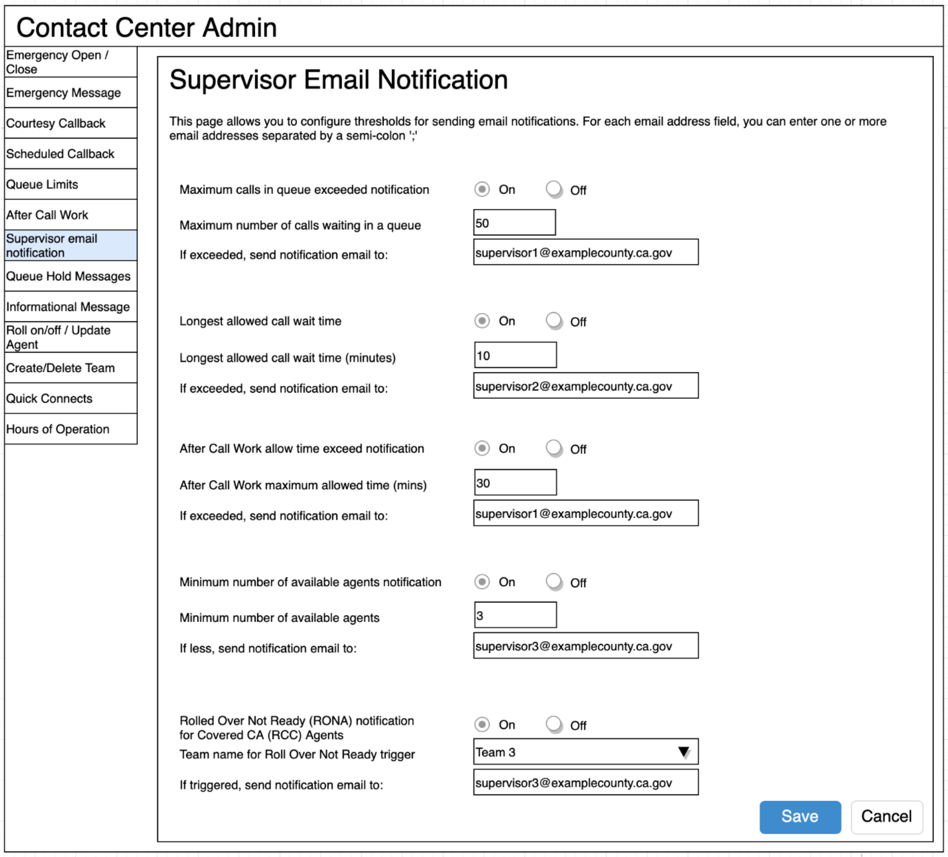


Figure 52 Supervisor Email Notification - all notifications enabled

2.12.2.7 Supervisor Email Notification – all notifications enabled

1. If all notification options are enabled, the user can enter and/or change all values for all listed notifications.
2. If user presses 'Save', changes are saved.
3. If the user presses 'Cancel' any changes are discarded. The displayed values are reverted back to their original saved values.

2.12.2.8 Notification Email Template

When a threshold is exceeded, the system sends a notification email to each listed email address for that metric.

Each email notification template is customizable for each County by the CalSAWS Contact Center operations team.

The emails sent will use the following template:

Email from: cc.support@calsaws.org
Email to: [list of contact emails for this notification type]
Subject: Contact Center Supervisor Notification: [Notification threshold name]
This is a system generated email to notify you that [Notification threshold name] was exceed at [date/time].
[Additional detail for specific threshold]

Where applicable, each notification can include an additional line of detail. For example, for the 'Maximum calls in queue' notification, an additional line of detail is included:

The Maximum Calls in Queue limit is currently 50. Queue name [example-queue-name] currently has 52 calls in queue.

2.12.2.9 Assumptions

1. The supported mechanism for sending the notification is via an email to the configured list of email addresses for each of the configured thresholds. There are no other supported alert mechanisms.
2. This functionality will be disabled for Regional Call Center (RCC) only Counties.

2.13 Create/Delete/Edit Team

2.13.1 Overview

The Create/Delete/Edit Team page allows an Admin user to create and delete teams (groups of Contact Center Agents and Admins).

Adding and removing Agents to/from teams is performed using the Roll-on/off Agent edit page (not using the Create/Delete/Edit Teams page).

2.13.2 Description of Changes

2.13.2.1 Create/Delete/Edit Team – No teams defined page mockup

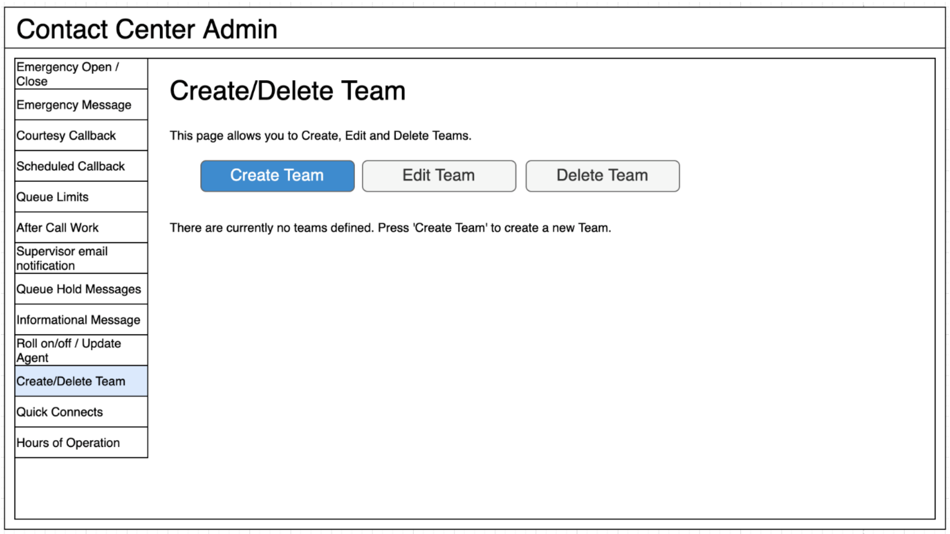


Figure 53 Create/Delete Team = no teams defined

2.13.2.2 Create/Delete/Edit Team – No teams defined

1. If there are no teams currently defined, a message is displayed "There are currently no teams defined. Press 'Create Team' to create a new team".
2. The 'Create Team' button is enabled.
3. The 'Edit Team' button is disabled.
4. The 'Delete Team' button is disabled.
5. If the user presses the 'Create Team' button, the 'Create New Team' dialog is displayed. See following section for page mockup and page flow.

2.13.2.3 Create/Delete/Edit Team – Teams defined page mockup

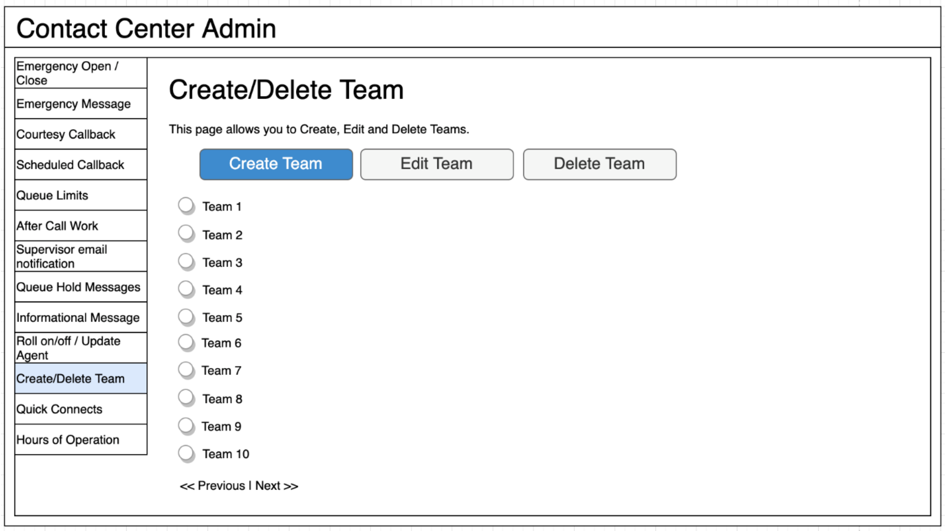


Figure 54 Create/Delete Team = teams defined

2.13.2.4 Create/Delete/Edit Team – Teams defined

1. Teams currently defined are listed on the page, up to 10 at a time.
2. The maximum number of teams per County is ~~250~~500.
3. If there are more than 10 teams to display, "<< Previous" and "Next >>" pagination buttons are displayed at the bottom of the page.
4. If the user is on the first page, the "<< Previous" link is disabled.
5. If the user is on the last page, the "Next >>" link is disabled.
6. If there are teams to show before and after the current page of Teams, both links are enabled.

2.13.2.5 Create/Delete/Edit Team – Create Team page mockup

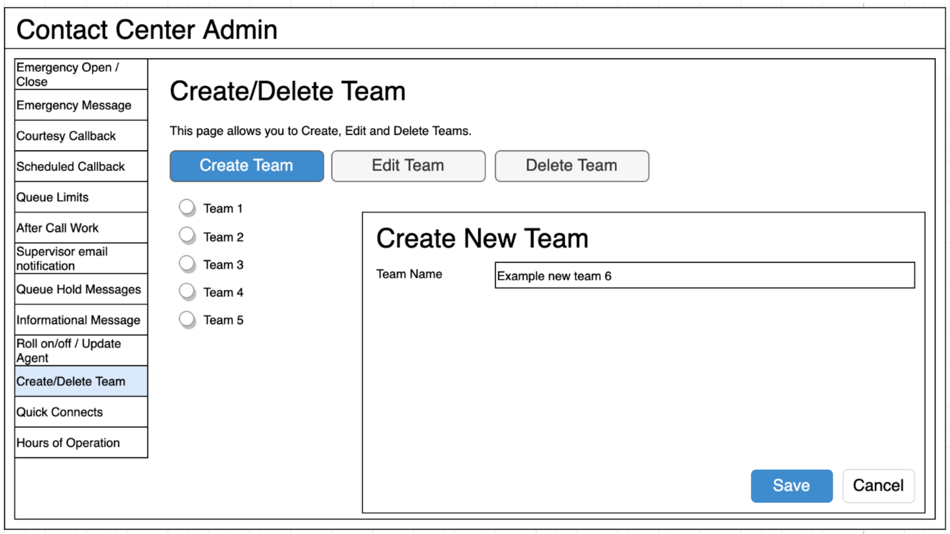


Figure 55 Create/Delete Team - Create New Team

2.13.2.6 Create/Delete/Edit Team – Create Team

1. User can add new teams up to a maximum of 250 per County.
2. If there are less than 250 teams defined for the current County and the user presses the ‘Create Team’ button, the Create New Team dialog is displayed,
3. User enters name for the new team, up to 60 alphanumeric characters.
4. If user presses the ‘Save’ button, the new team is created. The Create New Team dialog closes, and the displayed list of teams is updated to display the new team.
5. If the user pressed the ‘Cancel’ button, the Create New Team dialog is closed and no action is taken.

2.13.2.7 Create/Delete/Edit Team – Edit Team page mockup

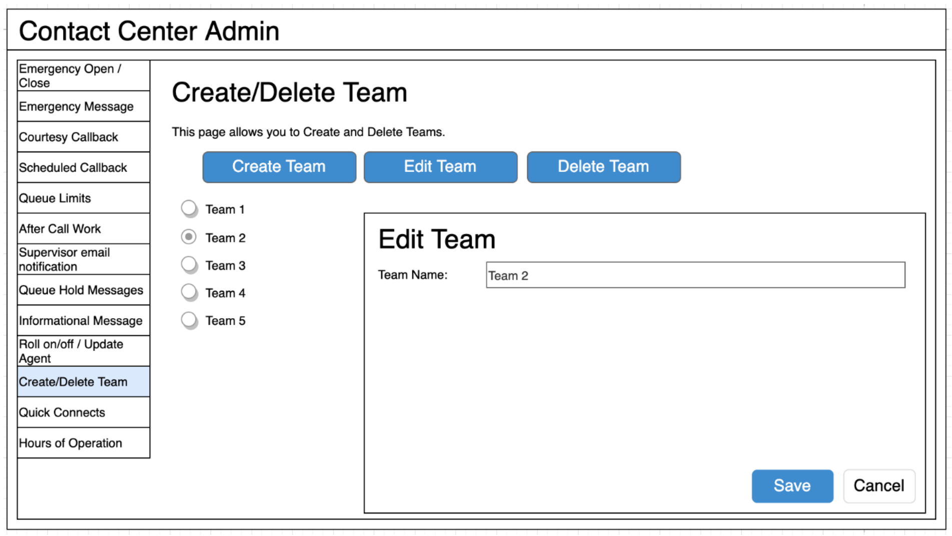


Figure 56 Create/Edit/Delete Team - Edit Team page

2.13.2.8 Create/Delete/Edit Team – Edit Team

1. If the user selects a team from the displayed list of teams and presses the 'Edit Team' button, the 'Edit Team' dialog is displayed.
2. The user can edit and change the current name for this team.
3. If the user presses the 'Save' button, any changes are saved and the dialog is closed.
4. If the user presses the 'Cancel' button, any changes are discarded and the dialog is closed.

2.13.2.9 Create/Delete/Edit Team – Delete Team page mockup

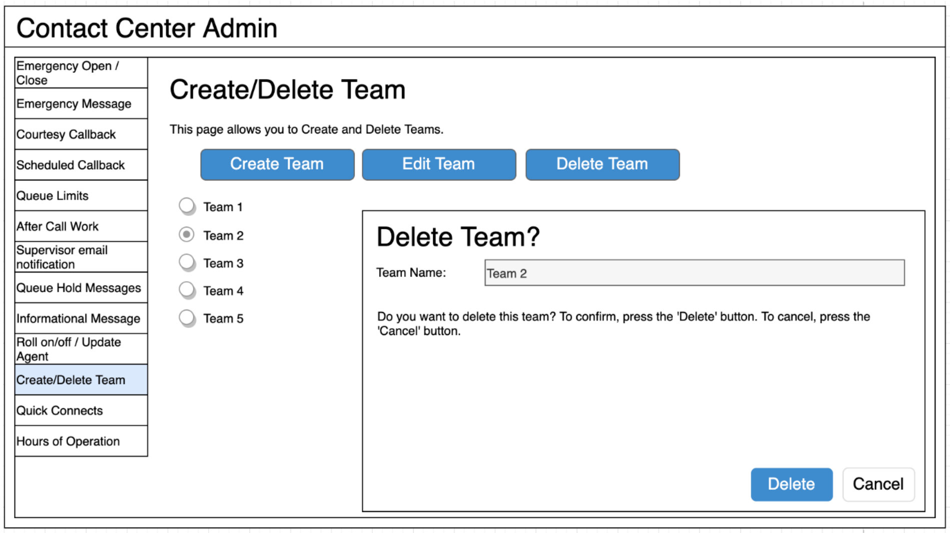


Figure 57 Create/Delete Team - Delete Team

2.13.2.10 Create/Delete/Edit Team – Delete Team

1. User selects a team to delete by pressing the radio button next to the team, and presses the 'Delete Team' button. The Delete Team dialog is displayed.
2. The Delete Team dialog asks the user to confirm deletion of the selected team.
3. If the user presses 'Delete':
    a. The team is deleted. The dialog closes and the displayed team list is updated to remove the deleted team.
    b. County staff that were assigned to the team are unassigned from the deleted team.
4. Deleting a team is permanent. To add back a team, the Admin user creates a new team following the page flow in section 2.13.2.6.

2.14 Quick Connects

2.14.1 Overview

The Quick Connects page allows the Admin user to maintain the list of available Quick Connects for their County.

To use a Quick Connect, it must be associated with a queue. This page also allows the user to assign and remove Quick Connects from one or more queues.

2.14.2 Description of Changes

Add a new panel to the Administration page that allows the Admin user to list, add, edit and delete available Quick Connects.

2.14.2.1 Quick Connects – no Quick Connects defined mockup

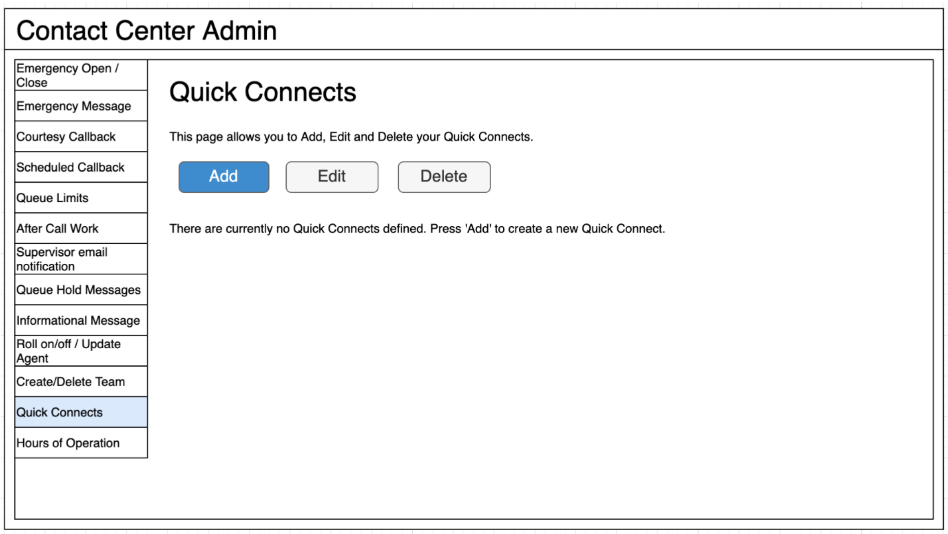


Figure 58 Quick Connects: No connects defined mockup

2.14.2.2 Quick Connects – No Quick Connects defined

1. If there are no Quick Connects currently defined, a message is displayed "There are currently no Quick Connects defined. Press 'Add' to create a new Quick Connect".
2. The 'Add' button is enabled.
3. The 'Edit' button is disabled.
4. The 'Delete' button is disabled.
5. If the user presses the 'Add' button, the 'Add New Quick Connect' dialog is displayed. See following sections for page mockup and page flow.

2.14.2.3 Quick Connects – Quick Connects defined mockup

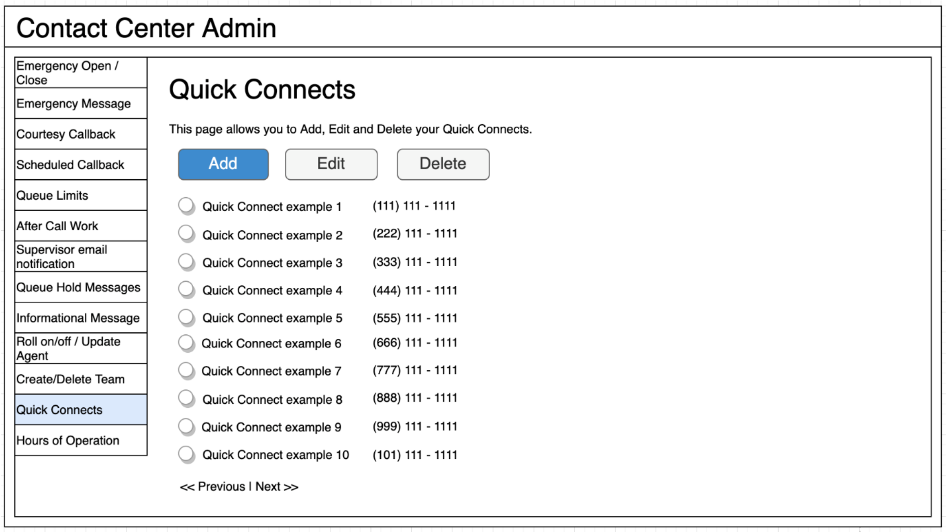


Figure 59 Quick Connects: Quick Connects defined mockup

2.14.2.4 Quick Connects – Quick Connects defined

1. Currently defined Quick Connects are listed on the page, up to 10 at a time.
2. Quick Connects are displayed in alphabetical ascending order by the Name.
3. The maximum number of Quick Connects per County is 100.
4. If there are more than 10 Quick Connects to display, "<< Previous" and "Next >>" pagination buttons are displayed at the bottom of the page.
5. If the user is on the first page, the "<< Previous" link is disabled.
6. If the user is on the last page, the "Next >>" link is disabled.
7. If there are Quick Connects to show before and after the current page of Teams, both links are enabled.

2.14.2.5 Quick Connects – add new Quick Connect mockup showing Quick Connect type

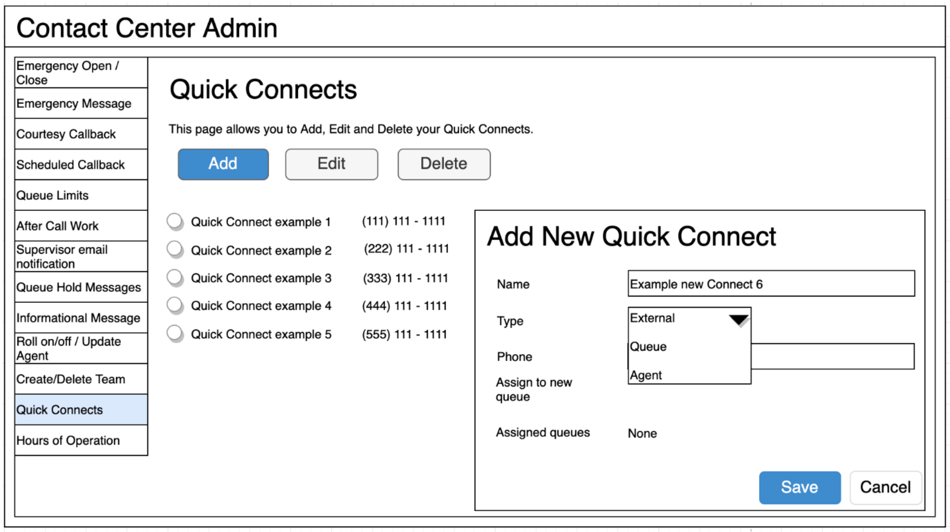


Figure 60 Quick Connects: Add new Quick Connect type dropdown menu

2.14.2.6 Quick Connects – add new Quick Connect - External type mockup

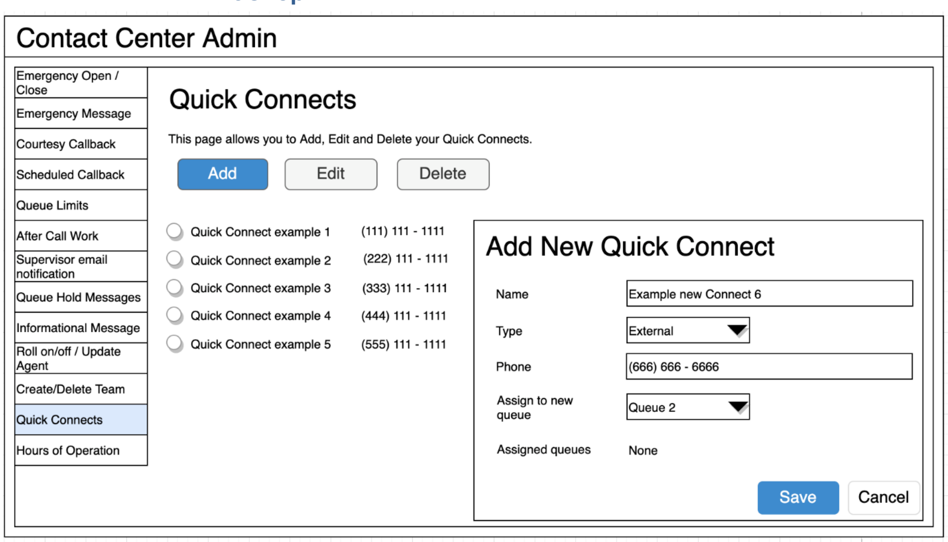


Figure 61 Quick Connects: Add new Quick Connect - External type

2.14.2.7 Quick Connects – add new Quick Connect - Queue type mockup

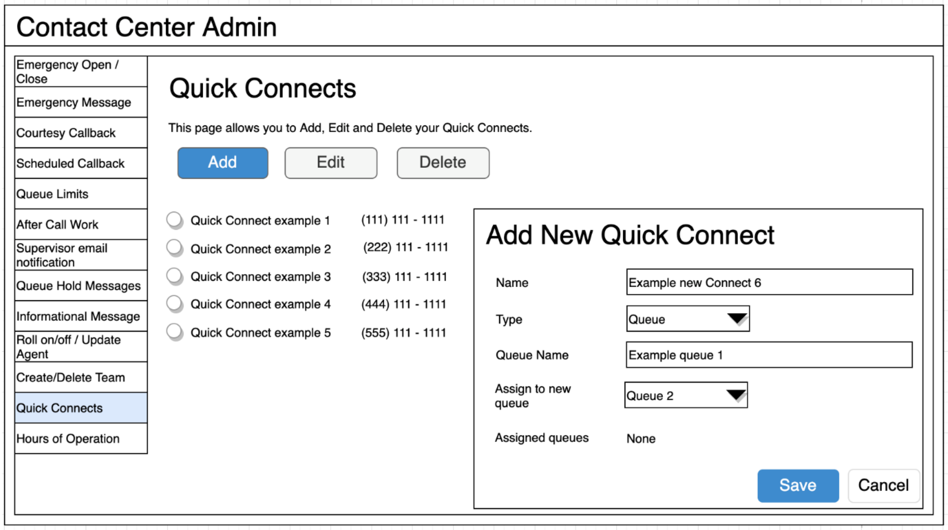


Figure 62 Quick Connects: Add new Quick Connect - Queue type

2.14.2.7 Quick Connects – add new Quick Connect - Agent type mockup

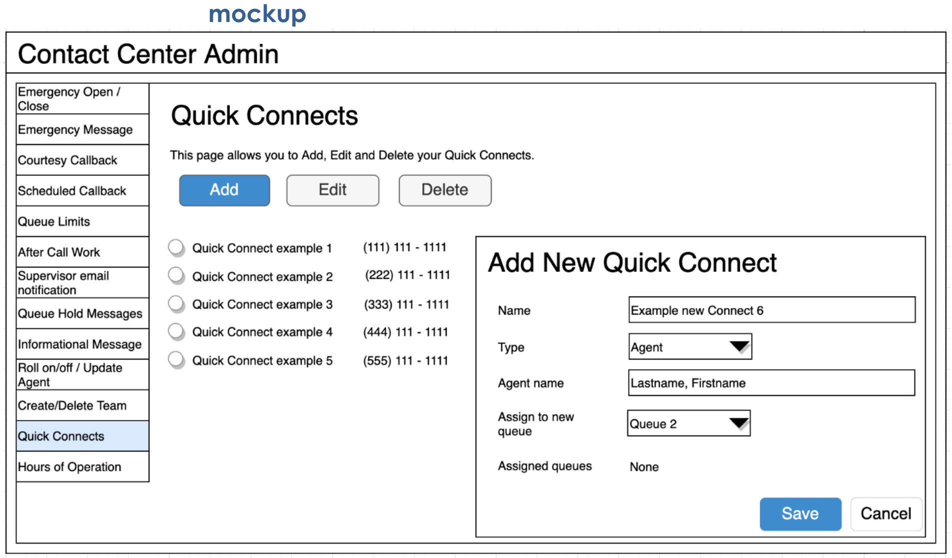


Figure 63 Quick Connects: Add new Quck Connect - Agent type

2.14.2.8 Quick Connects – add new Quick Connect – assign to new queue mockup

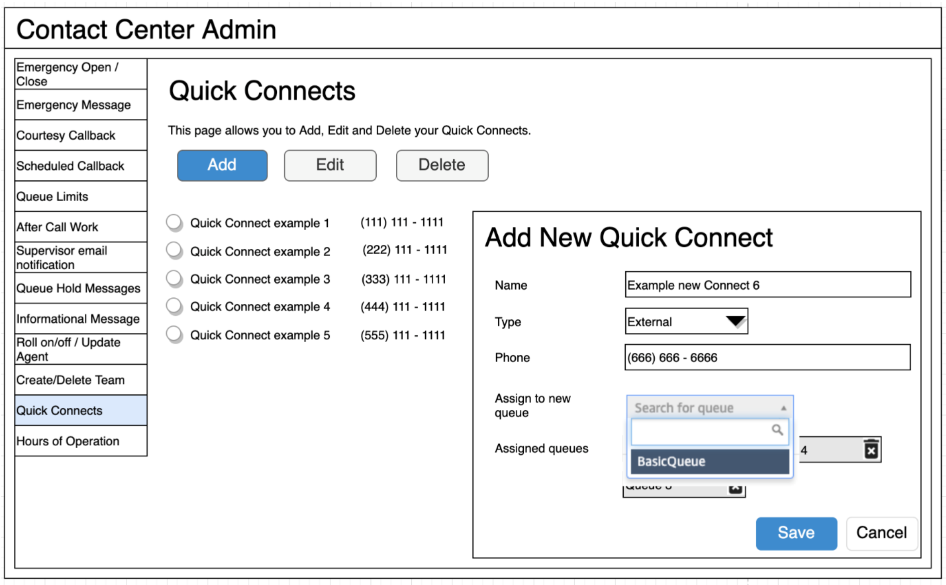


Figure 64 Quick Connects - assign to new queue mockup

2.14.2.9 Quick Connects – add new Quick Connect

1. User can add new Quick Connects up to a maximum of 100 per County.
2. If there are less than 100 Quick Connects defined for the current County and the user presses the 'Add' button, the Add New Quick Connect dialog is displayed.
3. User enters name for the new Quick Connect, up to 60 alphanumeric characters.
4. There are 3 types of Quick Connect that can be defined. The Admin user selects the Quick Connect type with the 'Type' dropdown that shows the 3 options:
   a. External: to transfer a caller to another phone number
   b. Agent: to call another Agent within the Contact Center
   c. Queue: to transfer the caller to a specific queue.
5. If the user selects 'External' type, the following input options are displayed (shown in Figure 61)
   a. Phone – the phone number to transfer the caller to

b. Assign to new Queue – the Queue Name this Quick Connect is assigned to

6. If the user selects 'Queue' type, the following input options are displayed (shown in Figure 62)
   a. Queue Name – the Queue Name callers are transferred to when this Quick Connect is used
   b. Assign to new Queue – the Queue Name this Quick Connect is assigned to
7. If the user selects 'Agent' type, the following input options are displayed (shown in Figure 63)
   a. Agent Name – the Agent the caller is transferred to when this Quick Connect is used
   b. Assign to new Queue – the Queue Name this Quick Connect is assigned to
8. The 'Assign to new Queue' field is a searchable dropdown list. The displayed list of queues is filtered by the characters typed into the field. For example, if the user types 'A' the displayed list is updated to list Queue Names beginning with 'A'.
9. When a Queue Name is selected from the list it is displayed in the list of associated queue names underneath the field.
10. If user presses the 'Save' button, the new Quick Connect is created. The Add New Quick Connect dialog closes, and the displayed list of Quick Connects is updated to display the newly added Quick Connect.
11. If the user pressed the 'Cancel' button, the Add New Quick Connect dialog is closed and no action is taken.

Each Quick Connect must be assigned to a queue. When Agents using the Enhanced CCP select to transfer a call using a Quick Connect, they are shown a list of Quick Connects assigned to the current queue they are working. Selecting the Quick Connect will then transfer the caller to either the external number, a queue, or another Agent, depending on the Quick Connect type.

2.14.2.9 Quick Connects – edit Quick Connect mockup

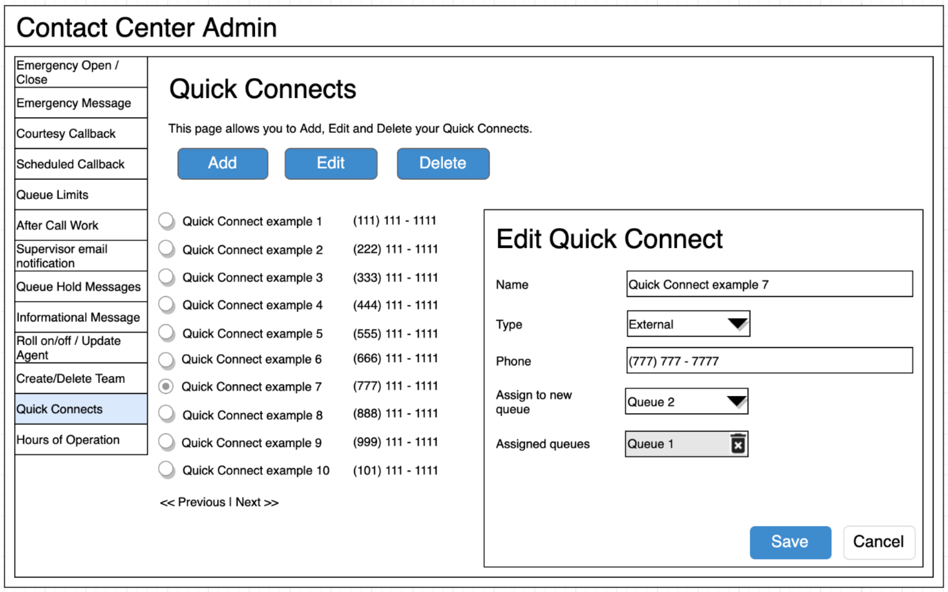


Figure 65 Quick Connects: Edit Quick Connect mockup

2.14.2.11 Quick Connects – edit Quick Connect

1. If the user selects a Quick Connect from the displayed list of Quick Connects and presses the 'Edit' button, the 'Edit Quick Connect' dialog is displayed.
2. The user can edit and change the current name and the Quick Connect type. If the Quick Connect type is changed, the displayed fields are updated to display the relevant fields for that type (as described in the Add New Quick Connect section).
3. The user can add and remove the Queues this Quick Connect is assigned to by selecting new Queues from the dropdown. To remove the association with a queue, the user presses the 'X' icon beside the queue name to delete the association to that queue.
4. If the user presses the 'Save' button, any changes are saved and the dialog is closed.
5. If the user presses the 'Cancel' button, any changes are discarded and the dialog is closed.

2.14.2.10 Quick Connects – delete Quick Connect mockup

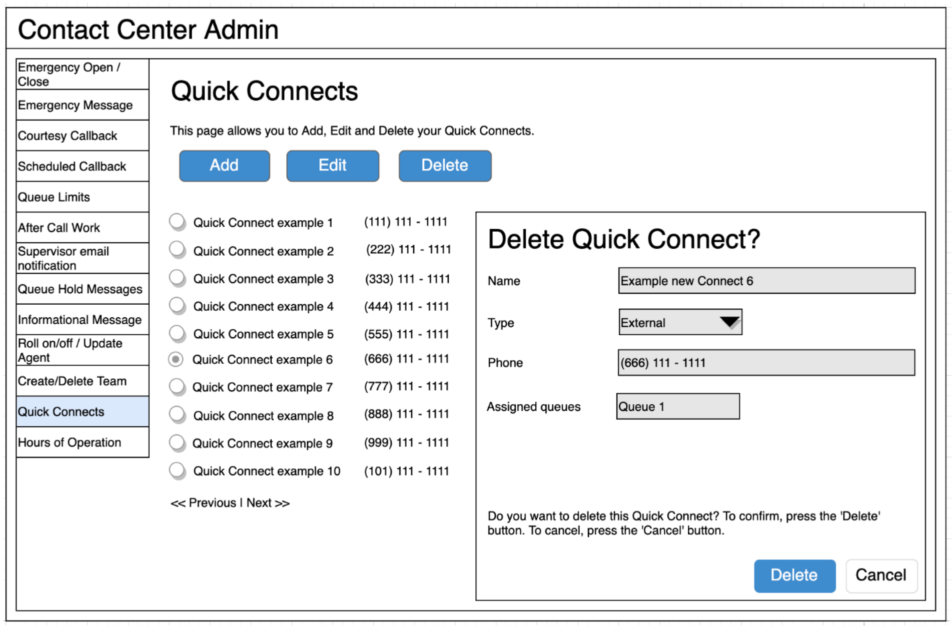


Figure 66 Quick Connects: delete Quick Connect mockup

2.14.2.13 Quick Connects – delete Quick Connect

1. User selects a Quick Connect to delete by pressing the radio button next to the name, and presses the 'Delete' button. The Delete Quick Connect dialog is displayed.
2. The Delete Quick Connect dialog asks the user to confirm deletion of the selected Quick Connect.
3. If the user presses 'Delete':
   a) The Quick Connect is deleted. The dialog closes and the displayed list is updated to remove the deleted Quick Connect.
4. Deleting a Quick Connect is permanent. To add back a Quick Connect, the Admin user can add a new Quick Connect following the page flow in section 2.14.2.6.

2.14.3 Assumptions

1. The maximum number of Quick Connects per County (per AWS Connect instance) is currently limited to a maximum of 100. This is an AWS Connect limitation.
2. This functionality will be enabled for RCC

2.15 Display Office Hours

2.15.2 Overview

This page displays the currently configured Hours of Operation for the current user's County. The page displays four tabs the include times and dates for:

- Contact Center office hours
- Holidays
- RCC office hours
- RCC holidays

2.15.3 Description of Changes

Add a new panel to the Admin Page that displays the currently configured Hours of Operation.

This page is display only; the values cannot be changed.

2.15.3.9 Hours of Operation mockup: Office hours

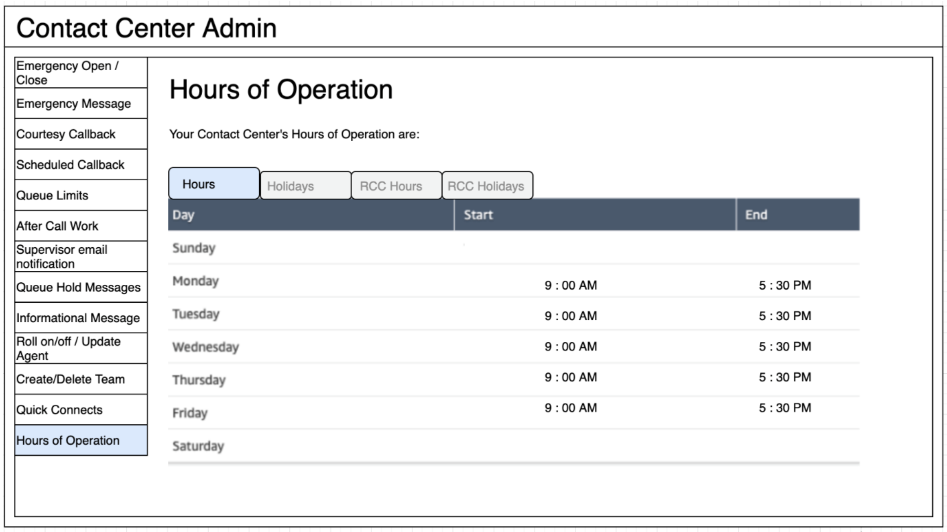


Figure 67 Hours of Operation mockup

2.15.3.10 Hours of Operation

The Hours of Operation panel on the Admin page displays currently configured Hours of Operation for each day of the week.

If the Contact Center is closed for a specific day, the Start and End times are shown as blank.

2.15.3.11 Hours of Operation mockup: Holidays

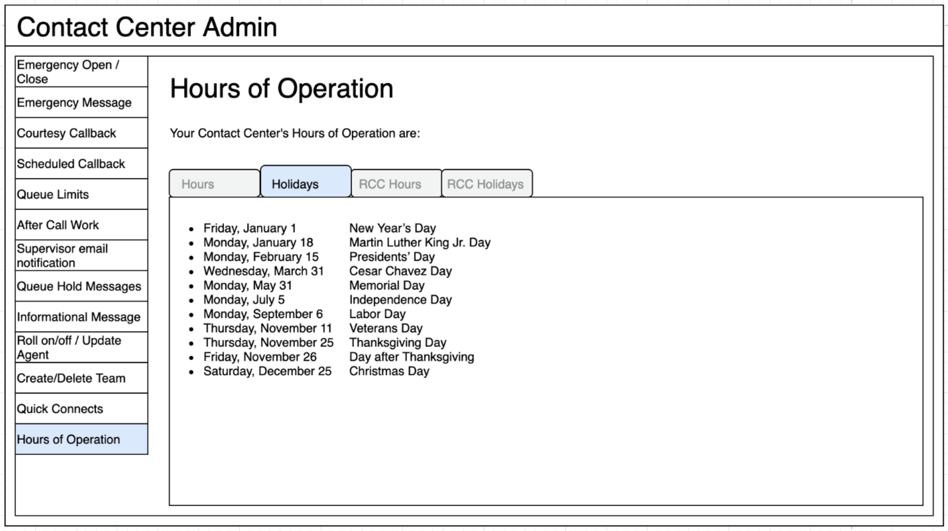


Figure 68 Hours of Operation: Holidays

2.15.3.12 Hours of Operation: Holidays

The holidays tab shows the county holiday dates observed for the current calendar year.

2.15.3.13 Hours of Operation mockup: RCC Hours

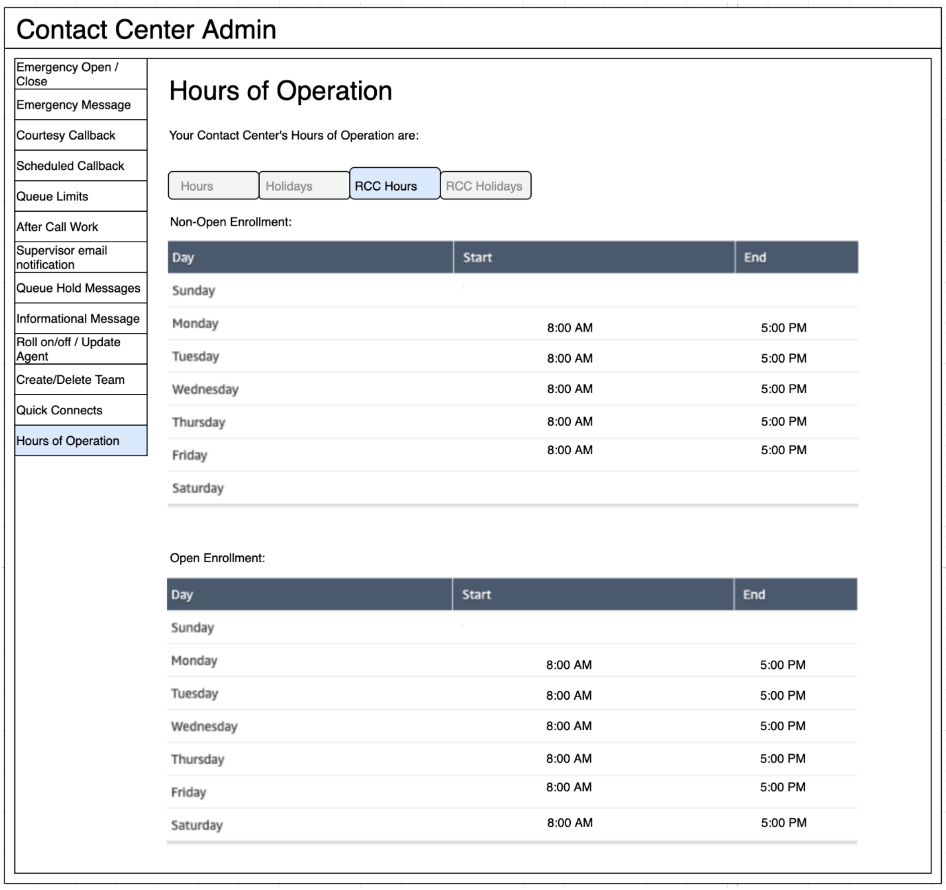


Figure 69 Hours of Operation: RCC Hours

2.15.3.14 Hours of Operation: RCC Hours

The RCC hours tab shows the office hours for Regional Call Centers, for during Open Enrollment and non-Open Enrollment.

2.15.3.15 Hours of Operation mockup: RCC Holidays

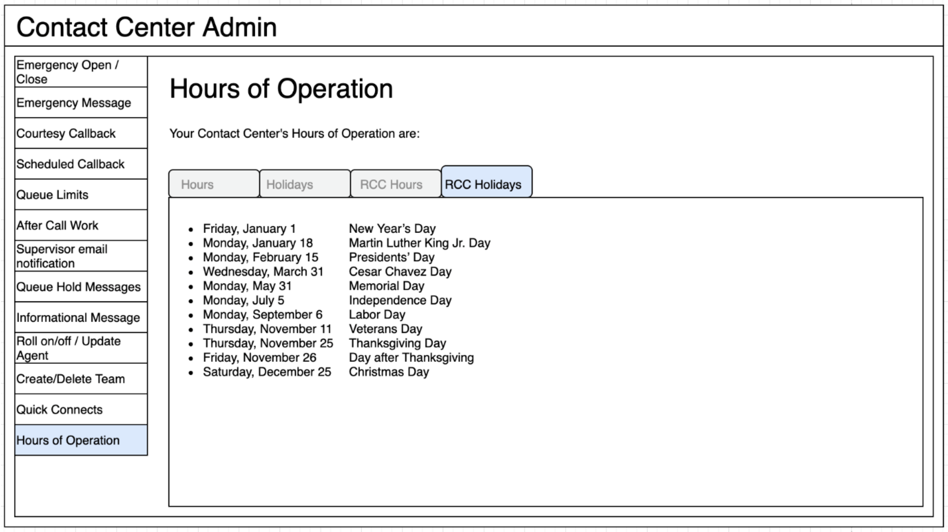


Figure 70Hours of Operation: RCC Holidays

2.15.3.16 Hours of Operation: RCC Holidays

The RCC Holidays tab shows holiday dates for the Regional Call Centers.

2.15.4 Assumptions

1. AWS Connect currently only supports APIs to retrieve Hours of Operation but not to update, therefore this page is only display only. Normal Contact Center Operations processes will be used to request a change to the current hours.
2. This page is enabled for RCC

2.16 Configuration Change Audit

2.16.2 Overview

The Administration pages allow an Admin user to change important configuration options for the Contact Center. Each time any of these features are changed, the changes are logged to an Audit database to ensure there is an audit trail.

This feature is included for each of the Administration page features described in the previous sections.

2.16.3 Description of Changes

1. Build a shared service that logs Administration page configuration changes to a single database.
2. Each time a user makes a change, for example, uses the Emergency Open/Close page to perform an Emergency Close or Open, the following fields are logged to the Audit database:
   a. CalSAWS User Id for user who made the change
   b. Date/timestamp of change
   c. Type of Change
   d. Changed value

Valid combinations of Type of Change and Changed Value are:

Type of Change	Changed Value – valid options	Additional values
Emergency Open/Close	Open Close	None
Queue Hold Message	Message added Message deleted Message edited	Message id
Courtesy Callback	Enabled Disabled Minutes changed Time slot range changed	None
Scheduled Callback	Enabled Disabled Time slot added Time slot deleted Callbacks changed	None
Queue Limits	Queue length changed	None
After Call Work Limit	Limit changed	None
Roll-on / Roll-off	Search performed Agent updated Roll-on agent Roll-off agent	Search value Agent id
Emergency Message	Message added Message deleted	Message id

	Message edited Current message changed	
Informational Message	Message added Message deleted Message edited Current message changed	Message id
Supervisor Email Notification	Notification enabled Notification disabled Notification email changed	Changed email address
Create/Delete Team	Create new team Edit team name Delete team	Team id
Quick Connects	Add new Quick Connection Edit Quick Connect Delete Quick Connect	Quick Connect id / name

3. SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1			
2			
3			
4			

4. REQUIREMENTS

4.14 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2222	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.	Section 2.12: Supervisor Email Notification configuration through Administration page
2284	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.	Section 2.6: Scheduled Callback configuration through Administration page Section 2.7: Queue Limit configuration through Administration page
2169/2291	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: The Counties will be responsible for the management of the following:	Agent Routing Profiles: - Section 2.9: Routing profile is configured for an Agent as part of Roll-on Resource roll-on/roll-off - Section 2.9

	- Work force management - Agent routing profiles - Use of the reporting solution - Resource roll-on/roll-off - Create/Delete/Edit Teams CalSAWS will be responsible for the management of the following: - IVR changes - Direct database access - IVR build - Adding/removing queues The Counties and CalSAWS will both have the ability to independently access the following: - Emergency closure - Queue hold messages - Office hour changes - Queue limits - After call work time limit - Informational messages - Emergency messages - Supervisor email notifications - Remote closure of the county Customer Service Center - Amazon Quick Connects	Create/Delete/Edit Teams - Section 2.13 Create / Delete Team Independently access the following: Emergency closure - Section 2.3 Queue hold messages - Section 2.4 Office hour changes - Section 2.15Administration page Queue limits - Section 2.7 After call work time limit - Section 2.8 Informational messages - Section 2.11 Emergency messages - Section 2.10 Supervisor email notifications - Section 2.12 Remote closure of the county - Section 2.3 Amazon Quick Connects - Section 2.14Administration page
2687	The CONTRACTOR shall configure the CalSAWS Application to have a Customer Service Center Administration Page. This page will	Sections 2.1.2.2 – 2.1.2.4: Administration page Security

	have a separate security right associated to it. There is one level of security permissions to the administration page.	
2688	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: - First Name - Last Name - County Email Address - Windows Login ID - Team - Role	Section 2.9: Roll-on/off / Update Agent through Administration page
2689	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.	Section 2.3: Emergency Closure through Administration page
2690	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: - English - Spanish	Custom Queue Hold Messages - Section 2.4

	- Farsi - Vietnamese - Mandarin - Armenian - Tagalog - Russian - Korean - Cambodian - Hmong - Cantonese - Arabic - Lao	
2691	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.	Section 2.5: Courtesy Callback configuration through Administration page
2692	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.	Section 2.5: Courtesy Callback configuration through Administration page
2693	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.	Section 2.7: Queue Limits configuration through Administration page
2694	The CONTRACTOR shall configure a Customer Service Center administration page within CalSAWS to give Customer Service Center	Section 2.8: After Call Work Limit configuration through Administration page

	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	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.	Section 2.10: Emergency Message configuration through Administration page

2696	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.	Section 2.11: Informational Message configuration through Administration page

5. APPENDIX

5.14 Emergency Open/Close Status – Data Model

Data element	Type	Example values
County Code	Number	19
Emergency Closure Status	String	Open, Closed
Last Update	Date	2021-03-01T09:00:00

5.15 Queue Hold Message Data Model

Data Element Name	Type	Example Values
countyId	Integer	19
messageId	Integer	1 … 10
messageName	String	Name of the message
messageText	String	The text for the Queue Hold message

5.16 Courtesy Callback Data Model

Data Element Name	Type	Example Value
countyId	Integer	19
courtesyCallbackEnabled	Boolean	True | false

5.17 Courtesy Callback Configuration Data Model

Data Element Name	Type	Example Value
countyId	Integer	19
minutesBeforeCallbackOffered	Integer	30
mondayStartTime	String	09:00:00
mondayEndTime	String	17:00:00
tuesdayStartTime	String	09:00:00
tuesdayEndTime	String	17:00:00
wednesdayStartTime	String	09:00:00
wednesdayEndTime	String	17:00:00
thursdayStartTime	String	09:00:00

thursdayEndTime	String	17:00:00
fridayStartTime	String	09:00:00
fridayEndTime	String	12:00:00

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-226837 | DDID 2699, 2210, 2705, 2706, 2707, 2708, 2709, 2710, 2711, 2712, 2713, 2714, 2715

CalSAWS Inbound IVR

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Dheeraj Muralidara
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
03/18/2021	V0.1	Draft	

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1 OVERVIEW

The CalSAWS Interactive Voice Response (IVR) system will use the Amazon Connect platform for customers to call in to the County Contact Center. Currently, a customer can call into the IVR and obtain general information. Unauthenticated customers or non-primary applicants are routed to an agent. Meanwhile customers that are successfully authenticated and are primary applicants, can perform the following actions: obtain benefit program information, select a form to request, check on the status for a submitted documentation, and change their IVR PIN.

1.1 Current Design

The existing C-IV functionality migrated to CalSAWS with (SCR CA-207026). The CalSAWS Amazon Connect Contact Center Solution communicates with the CalSAWS application Database for self-service information.

1.2 Requests

Create Los Angeles and CalWIN counties individual call flows in the Amazon Connect environment.

1.3 Overview of Recommendations

1. Inbound IVR to include a customized call flow for each county that includes prompts, menus, queues, program selection, and call transfers supported for supported languages listed below:
    a. English
    b. Spanish
    c. Farsi
    d. Vietnamese
    e. Mandarin
    f. Tagalog
    g. Russian
    h. Korean
    i. Cambodian
    j. Hmong
    k. Arabic
    l. Lao
    m. Cantonese
    n. Armenian
    o. Portuguese
2. Inbound IVR to include customer authentication via phone number and SSN, phone number and DOB, and voice print authentication.
3. Inbound IVR to include a self-service program menu to give customers the ability to receive benefit amounts.
4. Inbound IVR self-service information for the CalWORKs and CalFresh programs.
5. Inbound IVR self-service information for the Medi-Cal program.
6. Inbound IVR self-service information for the Welfare-to-Work (WTW) programs.

7. Inbound IVR to allow the customer to select previously generated/sent forms to be re mailed.
8. Inbound IVR to give the customer a dynamic set of options based on which forms are relevant to their case.
9. Inbound IVR to give the customer the ability to request a new IVR PIN to be mailed to them.
10. Inbound IVR to allow the customer to enter their zip code and request office hours and address.
11. Route calls to workers based on language and program selected by the customer in the IVR

1.4 Assumptions

1. Any re-mailing of documents will go to the same address as the original documents were mailed to.
2. Individual county call flows will be determined during individual county sessions
3. LA County and CalWIN county Inbound IVRs will go live with their individual county SCRs at a later date.

2 RECOMMENDATIONS

2.1 Inbound IVR Call Flow

2.1.1 Overview

The inbound IVR call flow is customized for all contact center counties including Los Angeles and the CalWIN counties. All inbound IVR call flows contain self-service menu options and the ability to speak to a worker/agent. Self-service menus are limited to customers that complete the authentication process.

2.1.2 Description of Changes

The verbiage for different languages supported in the inbound IVR will be translated and recorded by professional voice talent. Supported Languages:

- English (default)
- Spanish
- Farsi
- Vietnamese
- Mandarin
- Tagalog
- Russian
- Korean
- Cambodian
- Hmong
- Arabic

- Lao
- Cantonese
- Armenian
- Portuguese

Create self-service options, menus and prompts for Los Angeles and the CalWIN counties.

Note: Individual call flows will be customized including queues and call transfer options during the individual county sessions.

For callers who are successfully authenticated in the IVR, the system plays the self-service options if the caller is a primary applicant. One of the self-service options included provides benefit information for CalWORKs, CalFresh, Medi-Cal and Welfare to Work (WTW) programs. This information is provided dynamically based on the customers active programs.

2.1.2.1 Self-Service Option for CalWORKs and CalFresh Programs

For the CalWORKs Program and CalFresh Program, the IVR will play back the following:

- Program Status
- Total Amount issued for this month and next month.
- The system will notify the customer if benefits are on hold.
- IVR plays back both the current and upcoming benefits for CalWORKs and CalFresh programs.
- The Held status is only set when a worker manually updates an issuance and selects the 'Held' status.
- It means the customer hasn't received the benefit because the county is holding on to the warrant/check.

Callers can also check the document status of their CalWORKs status report, CalFresh Status Report, CalWORKs, and CalFresh Redetermination Packet.

Commented [DA1]: Please make sure the bullet points and text line up with bullet points and text shown below so formatting is the same.

2.1.2.2 Self-Service Option for the Medi-Cal Program

For the Medi-Cal program, the IVR will play back the following:

- Program Type (Medi-Cal Service Benefit)
- Program Status
- Share of cost information for each eligible member aided

Callers can also check the document status of their Medi-Cal Redetermination Packet

2.1.2.3 Self-Service Option for Welfare-to-Work (WTW) Program

For the Welfare to Work program, the IVR will play back the following:

- Program Status
- WTW reimbursement amount for each person participating in the program
- Sanction Status/Reason

2.1.2.4 Self-Service Option for Forms

The system gives the caller a dynamic set of options based on which forms are relevant to their case. They may select a form to request, based on the options available in this dynamic menu: Semi-annual report (SAR7), Transitional Medi-Cal Status report, or Verification of Benefits. The forms can be re-sent to the originally mailed address.

2.1.2.5 Self-Service Option to Request New IVR PIN

The system gives the customer the ability to change their IVR PIN. IVR PINs, such as 111111 or 123456, or non-numeric IVR PINs are not acceptable. Customers must input the same IVR PIN twice and they must match. Changes to the IVR PIN immediately take effect.

In the existing C-IV functionality, customers have a 4-digit IVR PIN that will be migrated to CalSAWS. When a new IVR PIN number is requested or generated, the system will mail a letter to the customer with a new 6-digit IVR PIN number.

2.1.2.6 Self-Service Option to Request Office Information

Callers will be prompted to enter their zip code into the IVR and the IVR will play back their County office hours and address.

2.2 Inbound IVR Authentication

2.2.1 Overview

Customers use authentication methods in the inbound IVR to access self service features. SSN/DOB/Phone Number combinations are some of the more widely used authentication methods. Additional methods of authentication include the use of an IVR PIN and/or Voice Print Authentication.

1. Phone number and SSN or DOB and IVR PIN
2. Voice print authentication

2.2.2 Description of Changes

During voice print authentication, the system asks the caller to speak their passphrase, “my voice is my password, please verify me.” The passphrase is streamed to a Voice Biometric Security server to compare the passphrase with previously enrolled voice prints. On a successful match, the caller will be routed to the self-service options. Voice Authenticate is included in SCR CA-226843.

New Cases generated in CalSAWS will contain letters as well as numbers. Customers will no longer be able to enter their case number if it contains letters, so the IVR will no longer prompt them to enter it.

The IVR will now prompt the customer to enter their phone number and their social security number. If the customer does not have or doesn’t know their social security number they will be prompted for their date of birth, and/or their IVR PIN. A customer will only be prompted for their date of birth or IVR PIN if the IVR is unable to narrow down the customer to a single person in the CalSAWS database.

Note: Customers issued a 4-digit IVR PIN in C-IV will be able to authenticate using their existing PIN. All IVR PINs generated in CalSAWS will be 6 digits. When a customer resets their existing 4-digit PIN migrated from C-IV the new PIN will be 6 digits.

If a caller selects to login with their social security number (SSN) and Date of Birth (DOB), the system matches the SSN and DOB combination before routing to the self-service options. Unauthenticated callers will be routed to the program menu.

2.3 Route to An Agent

2.3.1 Overview

If the caller decides to speak to a worker, the call is routed to a worker based on the program and language selected in the IVR.

2.3.2 Description of Changes

Calls are routed based on routing profiles and queues available in the county. Customers may be offered Courtesy Callback or Scheduled Callback based on the county administration of these features. Administration page features are included in SCR CA-226672

2.3.2.1 Courtesy Callback

The Courtesy Callback feature reduces the time callers must wait in queue. The feature allows the system to offer callers the option to be called back by the system when it is the caller's turn to speak to an available agent.

This option can be limited to callers who meet certain criteria. For example, callers with the possibility of being in queue for more than X minutes.

If the caller decides to be called back by the system, they will input their phone number. When the system determines that an agent is available, then a call is placed back to the caller.

2.3.2.2 Scheduled Callback

The "Scheduled Callback" feature is one where a customer will call the CalSAWS Call Center for a specific county and be placed into a queue. The system will then check if the call center is either closed or if it has reached the maximum limit of customers waiting in queue. In these cases, the customer will be offered callbacks for the next day at specified times. The Scheduled Callback functionality will be implemented with SCR CA-229573

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	AWS Inbound IVR Detailed Call Flow	Visio diagram represents inbound call flow, AWS inbound IVR Detailed Call Flow.pdf	

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
2699	The CONTRACTOR shall configure the Customer Service Center solution to route calls to workers based on language and program selected by the customer in the IVR.	Section 2.3
2210	The CONTRACTOR shall configure the Customer Service Center solution to utilize call routing to	Section 2.3

	queue calls to agents specifically by language and program.	
2705	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	Section 2.1.2
2706	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	Section 2.2
2707	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: - CalWORKs - CalFresh - Welfare to Work The CONTRACTOR shall configure the self-service program menu to give customers the	Section 2.1.2

	ability to receive active or inactive status for Medi-Cal.	
2708	The CONTRACTOR shall configure the CalSAWS Inbound IVR self-service information for the CalWORKs and CalFresh programs as stated below: - Program Status - Total Amount received for this month - If benefits are on hold, the system will notify the customer - If benefits are not on hold, the customer will be notified for what they are eligible to receive in the upcoming month.	Section 2.1.2.1
2709	The CONTRACTOR shall configure the CalSAWS Inbound IVR self-service information for the Medi-Cal program as stated below: - Medi-Cal Program Type - Status - Share of Cost - Medi-Cal Service Benefit	Section 2.1.2.2
2710	The CONTRACTOR shall configure the CalSAWS Inbound IVR self-service information for the Welfare-to-Work (WTW) programs as stated below: - Upcoming Activities - WTW Reimbursement Amount - Sanction Status/Reason	Section 2.1.2.3
2711	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: -Semi-annual report -Transitional Medi-Cal Status report -Passport to services form	Section 2.1.2.4
2712	The CONTRACTOR shall configure the CalSAWS Inbound IVR 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:	Section 2.1.2.1 and 2.1.2.2

	- CalWORKs status report - CalWORKs or CalFresh Redetermination packet - CalFresh status report - CalFresh Redetermination packet - Transitional Medi-Cal status report - Medi-Cal Redetermination packet	
2713	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.	Section 2.1.2.5
2714	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.	Section 2.1.2.5
2715	The CONTRACTOR shall configure the CalSAWS Inbound IVR to allow the customer to enter their zip code and request office hours and address.	Section 2.1.2.6

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-242088

Prevent CW/CF/GR(LA) Discontinuances if GEN 201 is not marked as 'Received'

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Howard Suksanti, Tom Lazio
	Reviewed By	

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
04/05/2022	1.0	Initial Draft	Howard Suksanti Tom Lazio
04/14/2022	2.0	Updated GA as impacted program	Tom Lazio
04/22/2022	3.0	Updated on Batch section 2.2	Howard Suksanti
05/10/2022	4.0	The following sections have been updated based on Region 6 feedback: - Updated Section 1.1 wording for generating the GEN 201 form and include RCA program. - Updated 1.3 Overview of Recommendations wording for 1 and 2. - Added assumption # 4 in Section 1.4. - Added RCA in Section 2.1.1 Overview and Section 2.1.3 Programs impacted.	Tom Lazio
07/13/2022	5.0	Content Revision: Remove RCA program from SCR due to being unable to test fail reason ''Failed to Comply with IFDS' with RCA program and no RCA cases could be found in CalSAWS that failed for this reason	Tom Lazio

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2.2.8 Failure Procedure/Operational Instructions 6
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1 OVERVIEW

CalSAWS will be updated to not auto discontinue program when GEN 201 FORM is not marked as Received.

1.1 Current Design

Currently, when a GEN 201 is auto-generated by CalSAWS, when the IFDS abstract is received or generated by user and sent out on a case with CalWORKS (CW), CalFresh (CF) or Los Angeles General Assistance/General Relief (GA) CalSAWS will discontinue the programs if this is not marked as "Received". The functionality around state form GEN 201 was derived from ACL 20-84 which does not instruct for these discontinuances to occur. Based on the language in ACL 20-84, workers are still required to allow for third party verification of income before any discontinuances take place, and discontinuance should not be automated.

1.2 Requests

Disable EDBC logic that automatically discontinues the CW, CF and GA program and program person when the GEN 201 form (formerly PA 2418B form) is not received timely.

Turn off PB19E432 (GEN 201 Controlled Form) batch job. This batch triggers regular Batch EDBC when GEN 201 form is past due date. This job runs monthly on the Batch 10-day cutoff date.

1.3 Overview of Recommendations

1. Update EDBC logic to not automatically discontinue the CW, CF and GA program and program person when an EDBC is ran and the GEN 201 form is past due date. This logic is also applicable to individuals who reapply for aid after the programming change has taken place.
2. Turn off PB19E432 (GEN 201 Controlled Form) batch job. This batch triggers regular Batch EDBC when GEN 201 form (regardless of how it was generated via IEVS IFDS Abstract page or Template Repository Search page) is past due date. This job runs monthly on the Batch 10-day cutoff date.

1.4 Assumptions

1. This SCR will not be updating existing EDBCs. However, if EDBC is re-run for one of those months after this SCR is implemented, the functionality introduced with this SCR should take affect (assuming no other factors have changed on the case).
2. The worker will still have the option of denying or discontinuing CW, CF or GA programs with the program reason of 'Failed to Comply with IFDS' through manual or override EDBC.

3. SCR CA-243421 has been created to add functionality to use Eligibility Non-Compliance when GEN 201 Form is past due date.
4. The current CalSAWS logic to auto-generate the GEN 201 when IFDS abstracts are loaded to CalSAWS remains unchanged.

2 RECOMMENDATIONS

2.1 Update EDBC Logic – Forms Tracking

2.1.1 Overview

The EDBC program forms tracking logic automatically discontinues the CW, CF, and GA programs when the past due GEN 201 (Income Verification) form has not been received. The consensus from the consortium is that this automation should not be occurring, and that any discontinuance of this type based on a GEN 201 needs to be manual and allow for time for third party verification.

2.1.2 Description of Changes

1. Update EDBC forms tracking logic to disable automatically setting the program and program person status of 'Denied' or 'Discontinued' with program and program person status reason of 'Failed to Comply with IFDS' when the past due GEN 201 (formerly PA 2418B) has not been received.

2.1.3 Programs Impacted

CF

CW

GA

2.2 Turn off PB19E432 (GEN 201 Controlled Form) batch job

2.2.1 Overview

PB19E432 (GEN 201 Controlled Form) batch triggers Batch EDBC when GEN 201 form is past due date. As part of this SCR, the batch job will be turned off.

2.2.2 Description of Change

Submit a BSCR to turn off PB19E432.

2.2.3 Execution Frequency

N/A.

2.2.4 Key Scheduling Dependencies

N/A.

2.2.5 Counties Impacted

Los Angeles County

2.2.6 Category

Core job.

2.2.7 Data Volume/Performance

N/A.

2.2.8 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…)

3 REQUIREMENTS

3.1 Project Requirements

REQ #	Requirement Text	How Requirement Met
2.8.1.1	The LRS shall fully automate and perform all aspects of the eligibility determination process and benefit level calculations for all categories of public assistance in a single pass without manual intervention.	Updating GEN 201 EDBC sweep job.

CalSAWS

California Statewide Automated Welfare System

Design Document

CA-246406

Office Schedule Accessibility Updates

CalSAWS	DOCUMENT APPROVAL HISTORY	
	Prepared By	Andrea Rodriguez
	Reviewed By	Michael Wu

DATE	DOCUMENT VERSION	REVISION DESCRIPTION	AUTHOR
6/14/2022	1.0	Initial	Andrea Rodriguez
7/13/2022	2.0	Content Revision Added Figures 2.1.4 and 2.1.5, Sections 2.1.3.1.a.i, 2.1.3.1.a.ii, and 2.1.3.1.c	Andrea Rodriguez

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1 OVERVIEW

1.1 Current Design

The CalSAWS application's base code was created prior to certain accessibility requirements for visually impaired users.

1.2 Requests

Update areas in the CalSAWS application that do not meet the Accessibility Guidelines as discovered during the Accessibility Audit.

1.3 Overview of Recommendations

1. On the Office Schedule page, the only way to visually see what type the availability would be is to look at the legend. Update the Office Schedule page to notify the user what the availability colors mean when they are navigated to by the keyboard alone and when hovered over using a mouse.

1.4 Assumptions

1. All other functionalities remain unchanged unless specifically called out by this document.
2. Other pages needing similar enhancements will be addressed in a future SCR.

2 RECOMMENDATIONS

This SCR will update areas in the CalSAWS application that do not meet the Accessibility Guidelines as discovered during the Accessibility Audit. The Office Schedule page will be updated to identify what the availability colors mean when they are navigated to by the keyboard alone and when hovered over using a mouse.

2.1 Office Schedule

2.1.1 Overview

Currently, the Office Schedule page does not notify the user what the availability colors mean when they are navigated to by the keyboard alone. The only way to visually see the type of availability would be to look at the legend.

This SCR will update the Office Schedule page to include a text label hover when selected by the keyboard or when hovered over using a mouse.

2.1.2 Office Schedule Mockup

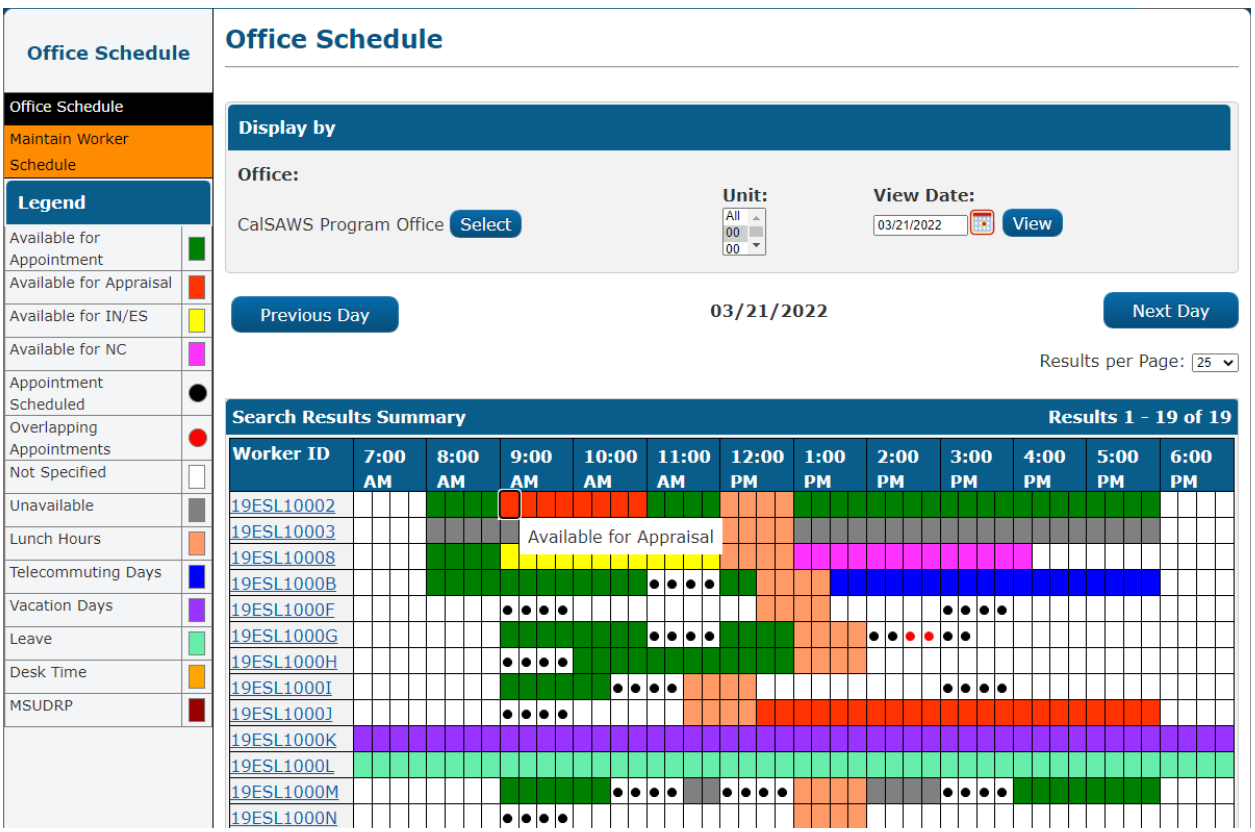

Figure 2.1.1 – "Available for Appraisal" Tool Tip when highlighted by keyboard

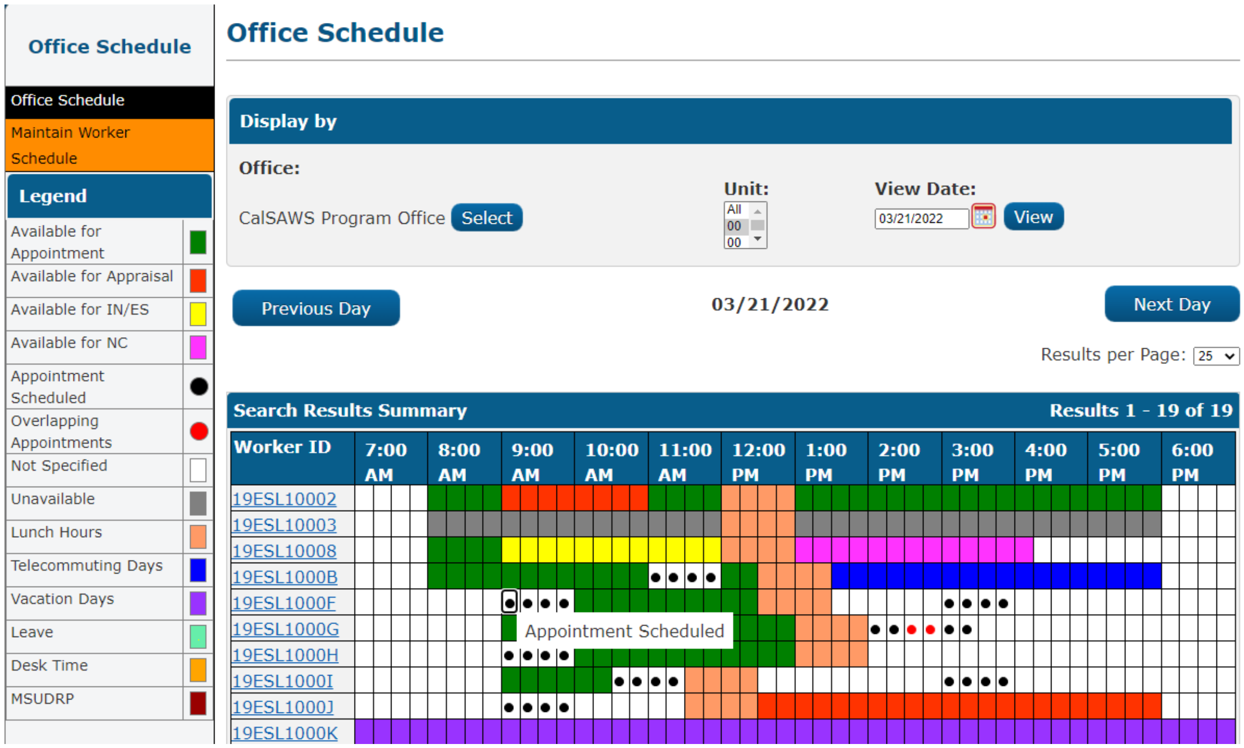

Figure 2.1.2 – “Appointment Scheduled” Tool Tip when highlighted by keyboard

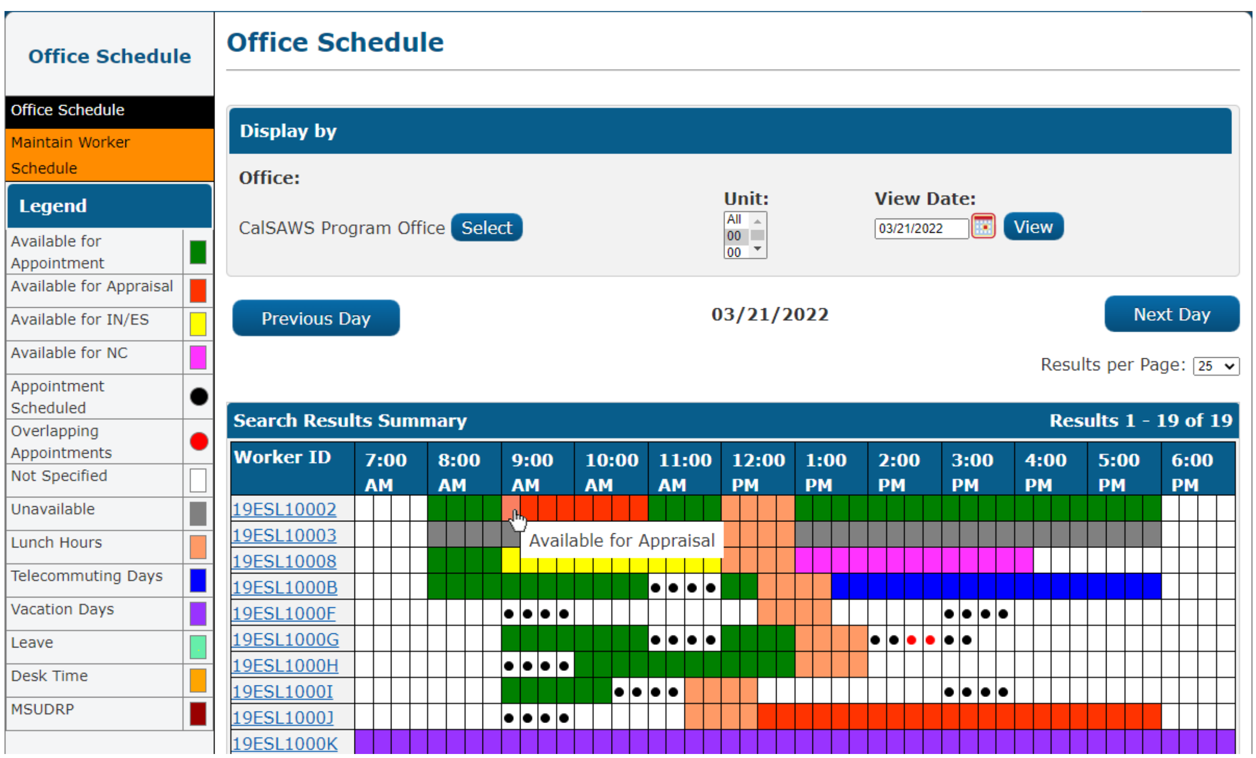

Figure 2.1.3 – “Available for Appraisal” Tool Tip when hovered over by mouse

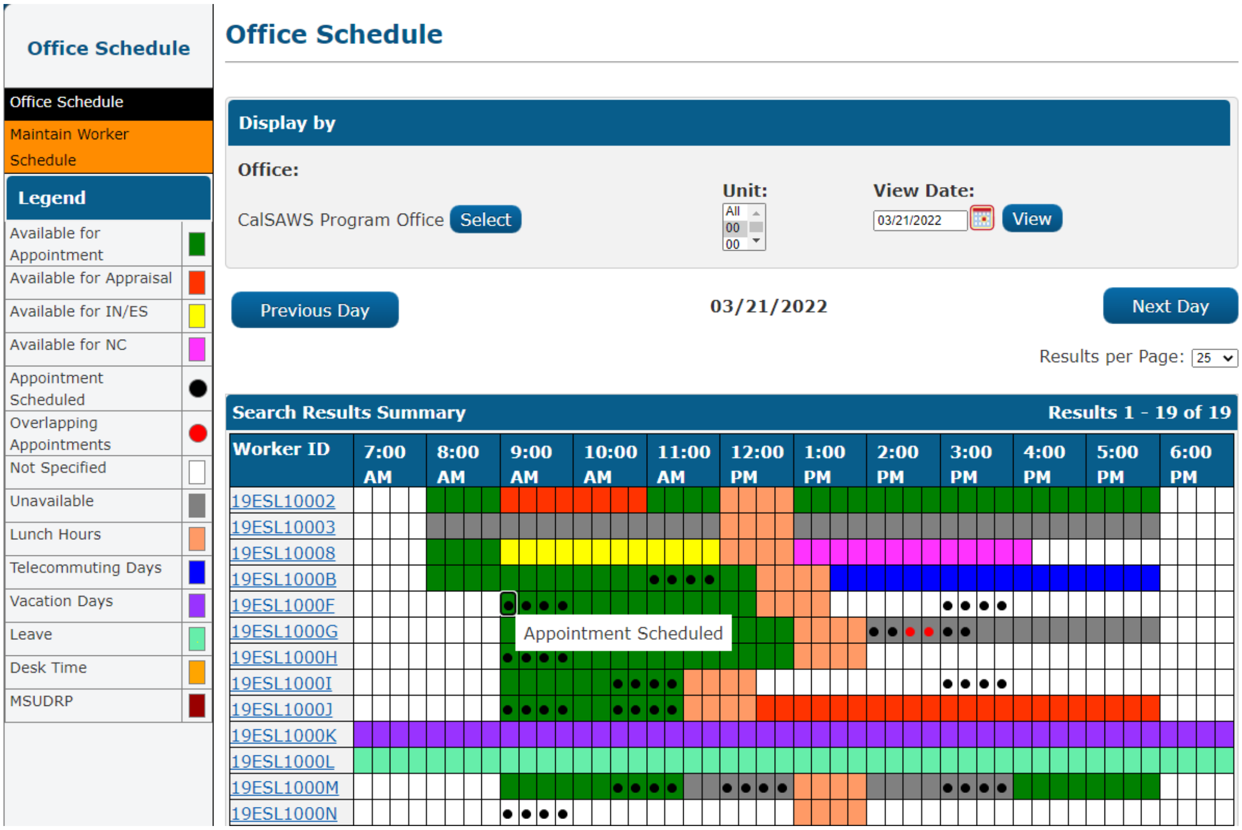

Figure 2.1.4 – "Appointment Scheduled" Tool Tip when highlighted by keyboard

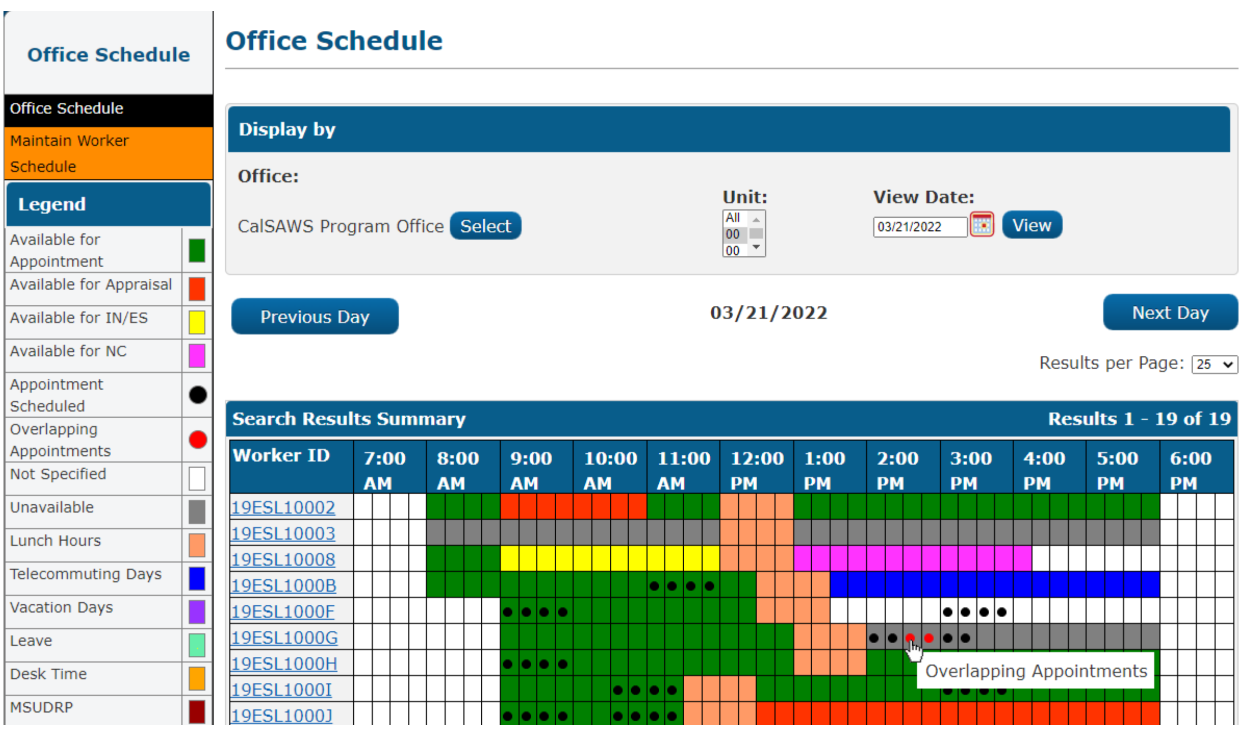

Figure 2.1.5 – "Overlapping Appointments" Tool Tip when hovered over by mouse

2.1.3 Description of Changes

1. Add a Tool Tip hover that will appear when a time block link is either highlighted by pressing the tab key (as shown in Figure 2.1.1 and 2.1.2) or hovered over by the mouse (as shown in Figure 2.1.3).
    a. The text will display the type of availability attributed to the time block.
        i. When there is both a black appointment scheduled dot and another availability type attributed to the same time block, the text will display "Appointment Scheduled" only (as shown in Figure 2.1.4).
        ii. When there is both a red overlapping appointment dot and another availability type attributed to the same time block, the text will display "Overlapping Appointment" only (as shown in Figure 2.1.5).
    b. The text in the hover will match the respective text for that availability in the legend.
    c. The size of the time blocks will remain the same and the tool tip hover will appear over the blocks (not within the blocks) as shown in Figures 2.1.1 to 2.1.5.
2. Add Screen Reader Accessible Alt Text attributes to each time block.
    a. The text will display the type of availability attributed to the time block.
    b. The text in the attribute will match the respective text for that availability in the legend.

2.1.4 Page Location

- **Global:** Admin Tools
- **Local:** Office Schedule

2.1.5 Security Updates

N/A

2.1.6 Page Mapping

N/A

2.1.7 Page Usage/Data Volume Impacts

N/A

3 REQUIREMENTS

3.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met
3.2.4.7	The LRS shall comply with the following accessibility and readability standards and guidelines, and any addendums and other revisions thereof, including: a. Section 508 of the Rehabilitation Act of 1973, as newly enacted in 1998; and b. Priority 1 and 2 level checkpoints of the Web Content Accessibility Guidelines 1.0 (WCAG 1.0 AA Conformance Level) developed by the W3C.	This SCR will update the Office Schedule page to meet accessibility requirements.