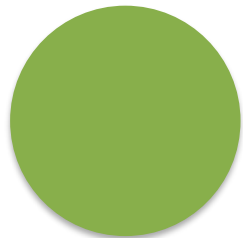


CalSAWS | Lobby Management Committee



March 23, 2023

Agenda

- ① Roll Call / Meeting Notes
- ② CA-257479: Add County Specific Visit Purpose to Reception Log
- ③ CA-250651: Reception Log – Created By Information
- ④ CA-250516: Update how OCR handles case context mis-match
- ⑤ CA-221945: Add page to Track Special Circumstances Details and Update Special Circumstance Indicator
- ⑥ Open Discussion



Roll Call / Meeting Notes



CA-257479: Add County Specific Visit
Purpose to Reception Log



Add County Specific Visit Purpose to Reception Log

Region #: 1

County: San Mateo

Submitter's Name: Edmund Zheng

Request: San Mateo, San Francisco, Monterey
 All Counties are required to use a global list of Visit Purposes, but there may be county-specific purposes that are not included in the list. Because of this, counties must sometimes re-purpose available options that may be confusing to staff and impact the counties' service level and the customer experience. In addition, there are county specific needs to streamline our lobby customer flow and triage tickets to the appropriate staff. For example, the visit purpose 'Talk to Eligibility Worker' may be too general for our county as not all eligibility workers serve all programs. For San Mateo, we have a special unit of eligibility workers for CAPI that serve only the CAPI program. As such, the county needs to do workarounds or re-purpose available options even though they are not easily identifiable as they do not exist in the global list. When we are trying to make the global list of visit purposes work for our county business process, there is a training concern for having to impose too many work arounds that are not intuitive and will impact customer service.

Recommendation: Give counties the ability to add Visit Purposes and Detail options that are only visible to users within their county. Include these county-added Visit Purposes and Detail options in the Reception Management Dashboard and other reports related to Lobby, only visible to the logged-in county. Allow counties to pull this data to create Ad-hoc reports using all Visit Purposes.
 Some suggestions:
 • Add button to the Visit Purpose List page (Admin Tools > Office Admin > Lobby Management > Visit Purpose page) to allow counties to add/edit/deactivate county-specific options.
 Questions for Lobby Facilitator:
 • How might this change impact Appointment Scheduling (i.e. List of Categories and Appointment Types)? Or is Visit Purpose unrelated?

Priority/Implementation Consideration(s): Priority/Implementation should consider the following:
 • Monterey is currently in CalSAWS
 • San Mateo County will migrate to CalSAWS as part of Wave 4 on July 3rd, 2023.
 • San Francisco County will migrate to CalSAWS as part of Wave 6 on October 30th, 2023.
 Some of these may be County-specific; however, existing global list of Visit Purpose does not meet our County Needs for the following Visit Purposes:
 • CAPI
 • Child Care
 • Update "GROW Worker" to "GA/GR Worker" since the GROW program is LA Specific
 • CalWORKS
 At minimum, these Visit Purposes will need to be added for San Mateo prior to Wave 4 Go Live.

Visit Purpose List

▼ Refine Your Search Search

Office: Select Search

| Visit Purpose | Prefix | Thresholds | |
|------------------------------------|--------|------------|-------------------|
| Agency Partners | | | Edit |
| Apply for Benefits | | | Edit |
| Appointment | | | Edit |
| Collections | | | Edit |
| Drop Off Document | | | Edit |
| EBT | | | Edit |

Visit Purpose Detail

Edit Close

Office: Visit Purpose: Agency Partners

| Prefix | Description |
|--------|-------------|
| | |

| Threshold Type | Minutes | Email Address |
|----------------|---------|---------------|
| First (Yellow) | | |
| Second (Red) | | |

Edit Close

Voting Card

CA-257479: Add County Specific Visit Purpose to Reception Log





CA-250651: Reception Log – Created By
Information

Reception Log – Created By Information

Reception Log Detail

* - Indicates required fields

Print Number Full Page Generate Referral Generate CW 31 Edit Close

Case Number: 2311452 Application Number: Person Name: * Case, Test 67F Office: Administration Date: 03/22/2023

Description: Individual Type: Emergency Requests: Language:

| Visit Information | | | | | | | | | |
|-------------------|-------------|--------|------------|---------|----------|-----------------|------------|-------------------|----------|
| Initial Time | Purpose * | Detail | Appt. Time | Program | Status | Number Assigned | Worker ID | Additional E-mail | Location |
| 6:34 PM | Appointment | | | CF | Complete | A3 | 33AS18PT02 | | Window B |

Reception Log Detail

* - Indicates required fields

Print Number

Case Number: 2311452 Appli: Description: Individ: Lang:

| Time | Status | Notified Worker | Message | E-mail | Created By |
|---------|---------------------|-----------------|---------|--------|-------------------|
| 6:34 PM | Waiting | | | | Best Receptionist |
| 6:34 PM | Worker Notified | 33AS18PT02 | Yes | Yes | Best Receptionist |
| 6:35 PM | Worker Acknowledged | | | | Erick Arreola |
| 6:36 PM | Lobby Monitor Call | | | | Erick Arreola |
| 6:37 PM | Lobby Monitor Call | | | | Erick Arreola |
| 6:37 PM | Meeting Started | | | | Erick Arreola |
| 6:38 PM | Complete | | | | Erick Arreola |

| Initial Time | Purpose * | Detail | Appt. Time | Program | Status | Number Assigned | Worker ID | Additional E-mail | Location |
|--------------|-------------|--------|------------|---------|----------|-----------------|------------|-------------------|----------|
| 6:34 PM | Appointment | | | CF | Complete | A3 | 33AS18PT02 | | Window B |

Region #: 1

County: Napa

Submitter's Name: Shanna Gardner

Request: Information is not available to identify who created a Reception Log Detail page. This prevents the ability to contact the worker who completed the page if necessary. It also limits the county's ability to conduct quality improvement reviews. Utilizing the "Last Updated" functionality that other pages offer would be insufficient in that as soon as a worker who works the reception log makes the update, the original information would be removed.

Recommendation: On the Reception Log Detail page, create a created by field or date/time stamp at the bottom of the page that includes the worker's ID and or link to the Worker Detail Page.

Voting Card

CA-250651: Reception Log – Created By
Information





CA-250516: Update how OCR handles
case context mis-match



CA-250516: Update how OCR handles case context mis-match

System Change Request released in March 2023 (23.03) modified imaging document routing logic for barcoded documents sent to OCR.

- Scenario: A Kern document is scanned using a San Bernardino kiosk or a worker in Placer County scans in a document from Sacramento)
- Issue: When another county's barcoded document was imaged, the case information changed to match the other county's case.
- Update: When another county's barcoded document is imaged, the case information used at the point of capture is retained and the document is sent to the County Exception queue.

*Imaging - Invalid Reason field will be set to "Case Context Mismatch"

CA-221945: Add page to Track Special
Circumstances Details and Update
Special Circumstance Indicator



CA-221945: Add page to Track Special Circumstances Details and Update Special Circumstance Indicator

System Change Request released in January 2023 (23.01)

- Per AB2030, update the Special Circumstance case flag indicator to notify the case worker once an applicant or recipient case file is initiated that the case person has requested special accommodation due to disability.

Case Name: Test Case
Case Number: 2311452

Journal Tasks Help Resources Page Mapping Imaging Log Out

Case Info Eligibility Empl. Services Child Care Resource Databank Fiscal Special Units Reports Client Corresp. Admin Tools

Special Circumstances Detail

*- Indicates required fields

Edit Close

Name:
Case, Test 67F

Special Circumstances

Behavioral Service Animal
Hearing Impairment Speech Impairment
Literacy Visual Impairment
Physical Disability Other
Psychiatric or Mental Health Disability

Accommodation Preferences

ADA Rooms Language Line/Inter
ADA Seating Large Print
Audio CD Phone Interview
Braille Short Window Time
Data DVD Other Alternate Form

Notes:

Save Remove Cancel

*- Indicates required fields

Case Number: 2311452 Application Number: Person Name: * Case, Test 67F Office: Administration Date: 03/22/2023
 Interpreter
 Hide From Monitor
 Special Circumstances

Description: Individual Type: Emergency Request: Visual Impairment

Language:

Visit Information

| Initial Time | Purpose | Detail | Appt. Time | Program | Status | Prefix | Number | Worker ID | Additional E-mail | Location |
|----------------------------------|-------------|--------|------------|---------|---------|--------|--------|-----------|-------------------|----------|
| <input type="checkbox"/> 7:13 PM | Appointment | | | CF | Waiting | A | 4 | | Select | Window B |
| <input type="checkbox"/> | | | | | | | New | | Select | Window B |

Add



Open Discussion

*Next Meeting - June 22nd, 2023

