



California Statewide Automated Welfare System

Design Document

CA-254796

Automated EBT Card Replacement

CalSAWS	DOCUMENT APPROVAL HISTORY	
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Table of Contents

1	Overview	4
1.1	Current Design.....	4
1.2	Requests.....	4
1.3	Overview of Recommendations.....	4
1.4	Assumptions	4
2	Recommendations.....	5
2.1	IVR Application.....	5
2.1.1	Overview	5
2.1.2	Description of Changes	5
2.2	Robotic Process Automation.....	9
2.2.1	Overview	9
2.2.2	Robotic Process Automation Mockup	9
2.2.3	Description of Changes	15
3	Supporting Documents	17
4	Requirements	18
4.1	Project Requirements.....	18
4.2	Migration Requirements.....	18
5	Migration Impacts	19
6	Appendix.....	20

1 OVERVIEW

This robotic process automation (RPA) will allow customers to request an electronic benefits transfer (EBT) card replacement via interactive voice response (IVR). This document covers the IVR call flow in which customers will select the EBT replacement option, their method of delivery and the steps the RPA will take to complete this request within CalSAWS.

1.1 Current Design

There is no automated option to replace an EBT card in the IVR.

1.2 Requests

Add a self-service option in the Inbound IVR to request a replacement EBT card for all 58 counties.

1.3 Overview of Recommendations

1. Modify the County IVR call flows
 - a. EBT Card replacement option
 - b. IVR (via Amazon Connect) checks DynamoDB table to see if county has opted into EBT Card mail delivery and pickup
 - c. IVR (via Amazon Connect) checks DynamoDB table to confirm user has not requested EBT Card within the last 90 days
 - d. EBT Card delivery option
 - i. Mail – Mailed to the customer's mailing address noted in CalSAWS.
 - ii. Pickup – The card is available to be printed at a district office.
 - e. IVR (via Amazon Connect) relays the customer request details (listed) to the RPA by API call.
 - i. Case Id
 - ii. Delivery Method
2. RPA receives the request and reissues the card within CalSAWS.

1.4 Assumptions

1. No core CalSAWS application changes are required. The RPA interacts with the CalSAWS front end webpage.
2. EBT card replacements will be issued for the primary account holder.
3. EBT card replacements can only be requested by the primary applicant on the case
4. The RPA uses the customer's current name and address within CalSAWS. Any changes will require speaking to an agent.
 - a. There is an option in the IVR to verify if the customer's name or address has changed.
5. The customer authentication process will not change.

6. The global case self-service options will be updated to include EBT Replacement
7. If the request is completed successfully, journal entry will be created.
8. If an error occurs with the RPA a Task will be created
9. If the IVR cannot reach the RPA to deliver the EBT request, a standard user-friendly message will notify the customer on the call.
10. Counties will have the ability to opt-in or opt-out. A CRFI will be sent after approval of the design.
11. This change will not include any reporting
12. BIC automated replacement functionality is not part of this SCR
13. The process is the same for all counties. When the reissue button is pressed and the page is saved, a real time Host to Host transaction is sent to the EBT vendor Fidelity Information Services (FIS) to add a new EBT card for the same client. FIS cancels the previous card and issues a new card and sends a success response to CalSAWS with the new EBT card number. When the success response is received by CalSAWS, the previous card is canceled in CalSAWS and the new card (received in the response message) is added in the CalSAWS database. All this happens real-time.

2 RECOMMENDATIONS

2.1 IVR Application

2.1.1 Overview

Update the County IVR Call Flows to include the option to request a replacement EBT Card. That option will send the customer to a new contact flow that will ask the customer some follow up questions and submit the request to replace the EBT through the RPA solution via an API call.

2.1.2 Description of Changes

1. Modify the Case Self Service Page
 - a. Add the Self-Service Option "To request a replacement EBT card, press 4."
 - i. Send the caller to the new "EBT Card" Flow
2. Create a new lambda "calsaws_ivr_shared_services_dynamo_reader" that can query central DynamoDB tables in the shared functions account from county accounts.
3. Create a new DynamoDB table "EBT Card Delivery Options" in the shared functions account that stores information about the county opt-in/out choices for mail delivery and pick-up.

Property	Value	Type
countyCode	<countyCode>	String
mailDelivery	"Yes" or "No"	String
pickUp	"Yes" or "No"	String

4. Create a new DynamoDB table "EBT Card Request History" in the shared functions account that tracks EBT Card requests from the last 90 days.

Property	Value	Type
personId	<personId>	String
requestDate	<Date of EBT Card Replacement Request>	DateTime

5. Create a new contact flow "EBT Card"
 - a. Record the following messages" in all 15 supported languages
 - i. menu_C90_Case_Self_Service_Menu = "To hear current benefits information, press 1. To request a copy of a form or your verification of benefits, press 2. To check the status of a document requested or submitted, press 3. To request a replacement EBT, press 4. To change your IVR PIN, press 5. To speak to an eligibility worker, press 6. To hear these choices again, press 7."
 - ii. msg_C90_EBT_Request = "To request a new EBT card, you will need to confirm a couple questions."
 - iii. menu_C90_EBT_Name = "If your name is the same as it appears on your EBT card, press 1. If your name is different, press 2. To hear these choices again, press 7."
 - i. menu_C90_EBT_Address = "If your mailing address is the same, press 1. If your mailing address has recently changed, press 2. To hear these choices again, press 7."
 - ii. menu_C90_EBT_Delivery = "If you want your new EBT card mailed to your address on file, press 1. If you want to pick up your new EBT card at your local district office, press 2. To hear these choices again, press 7."
 - iii. msg_C90_RPA_Mail_Success = "Thank you. Your EBT card replacement request has been received. Please allow two to three business days for it to be sent to your address on file."

- iv. msg_C19_RPA_Pickup_Success = "Thank you. Your EBT card replacement request has been received. Please allow 2 hours for processing for pickup."
- b. Use the "calsaws_ivr_shared_services_dynamo_reader" lambda to query the "EBT Card Delivery Options" DynamoDB table and check if the county the user is calling from has opted into mail delivery and pick up
 - i. If the county has opted into mail delivery, continue in the call flow
 - ii. If the county has opted out of mail delivery, send them to the CalFresh queue
- c. Use the "calsaws_ivr_shared_services_dynamo_reader" lambda to query the "EBT Card Request History" DynamoDB table and check if the user has requested an EBT card within the last 90 days
 - i. If the user has not requested an EBT card, send them to menu_C90_EBT_Name
 - ii. If the user has requested an EBT card within the last 90 days, send the caller to the CalFresh queue to speak to a representative
- d. Create a Customer Input option that plays menu_C90_EBT_Name
 - i. If the customer selects option 1, send them to menu_C90_EBT_Address
 - ii. If the customer selects option 2, send them to the CalFresh queue
 - iii. If the Customer makes no selection or makes an invalid selection, repeat the menu twice then send them to the General queue
- e. Create a Customer Input option that plays menu_C90_EBT_Address
 - i. If the customer selects option 1, send them to menu_C90_EBT_Delivery
 - ii. If the customer selects option 2, send them to the CalFresh queue
 - iii. If the Customer makes no selection or makes an invalid selection, repeat the menu twice then send them to the General queue
- f. Create a Customer Input option that plays menu_C90_EBT_Delivery
 - i. If the customer selects option 1, set the delivery option to Mail and send caller to "calsaws_ivr_rpa_api_request" Lambda
 - ii. If the customer selects option 2, set the delivery option to Pick up and send caller to "calsaws_ivr_rpa_api_request" Lambda

- iii. If the Customer makes no selection or makes an invalid selection, repeat the menu twice then send them to the General queue
- g. Create a new Lambda "calsaws_ivr_rpa_api_request"
 - i. If the user has selected the pickup option, but the county has not opted into pickup, exit lambda and send to the CalFresh Queue
 - ii. Send the following information as an API Request

Property	Value	Type
Queue	Dev: EBTReplacementProcess_AZ_Connect UAT: EBTReplacementProcess_AZ_Connect Production: EBTReplacementProcess	Dynamic List
Priority	Normal	String
Defer Date	<Time of request>	DateTime
DueDate	<Time of request plus 24 hours>	DateTime
Reference	{{Guid}}_CaseNumber	Text
Case Number	<Case Number>	Text
EBT Replacement	Y	String
Replacement Type	"Pickup" or "Mail"	String
Status	Pending	String

- iii. If the lambda successfully sends the API request, play the message "msg_C90_RPA_EBT_Success" and update the "EBT Card Request History" DynamoDB table with the personId and request date
- iv. If the lambda fails, play the global error message, "We're sorry, we are unable to process your request at this time", and send the caller to the General Queue
- h. For more information see the attached document "CA-254796 – Automated EBT Card Replacement Call Flow"

2.2 Robotic Process Automation

2.2.1 Overview

Implement the RPA to process the EBT replacement card requests from the Inbound IVR. The RPA will automatically navigate CalSAWS and reissue a card using the existing process in the application.

2.2.2 Robotic Process Automation Mockup

A mockup of the CalSAWS login screen. At the top center is the CalSAWS logo. Below it is a text input field labeled "User Name". Underneath the field is a checkbox labeled "Remember my username". Below the checkbox is a blue "LOG IN" button. At the bottom, in small text, it says "C-ID Users Only Please use your C-ID User Name and C-ID Password upon first time login."

Figure 2.2.2.1 – CalSAWS Login Screen

A mockup of the CalSAWS password screen. At the top center is the CalSAWS logo. Below it is the text "Enter password". Underneath is a password input field with a masked password "*****" and a toggle icon on the right. Below the field is a blue "LOG IN" button.

Figure 2.2.2.2 – CalSAWS Password Screen



Figure 2.2.2.3 – CalSAWS Security Screen

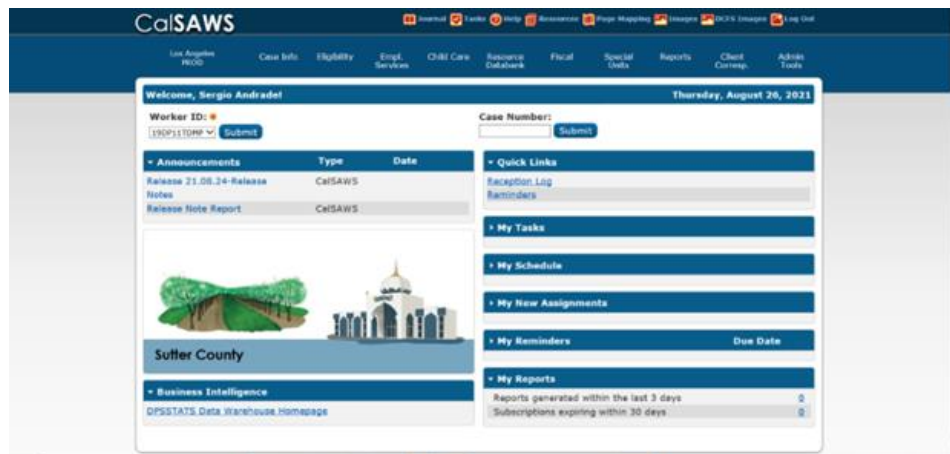


Figure 2.2.2.4 – CalSAWS Home Page

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

Los Angeles PROD

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

Case Summary

Case Number: Go

Person Search

EBT Account Search

Application Registration

Case Summary

Contact

Authorized Representative

Negative Action

New Program

New Person

Hide Person

EBT Account List

Issuance History

Expungement History

Child Support Collections

Time Limit Aid Summary

Case Flag

Case Summary

Case Name County Los Angeles

Companion Cases

Case Number Case Name Add

e-Applications

Display: 10/01/2021 View

Case Flags

CalWORKs

CalFresh

Figure 2.2.2.5 – CalSAWS Case Summary Page

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

Los Angeles PROD

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

Case Summary

Case Number: Go

Person Search

EBT Account Search

Application Registration

Case Summary

Contact

Authorized Representative

Negative Action

New Program

New Person

Hide Person

EBT Account List

Issuance History

EBT Account List

Account Number Primary Cardholder Cash Status CalFresh Status Begin Date End Date

XXXXXXXXXX Active Active 11/20/2015

Add

Add

This Type 1 page took 0.89 seconds to load.

Figure 2.2.2.6 – CalSAWS EBT Account List Page

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

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

Case Summary

Case Number: Go

Person Search

EBT Account Search

Application Registration

Case Summary

Contact

Authorized Representative

Negative Action

New Program

New Person

Hide Person

EBT Account List

EBT Repayment List

EBT Card Transaction Search

Issuance History

Expungement History

Child Support Collections

Time Limit Aid Summary

EBT Account Detail

Add Card Close

Account Number: Begin Date: 11/20/2015 End Date:

Card Holder: * Card Access Type: * Cash & CalFresh Card Status: Issued

Cash

Status: Active Balance: \$30.01

CalFresh

Status: Active Balance: \$12.57

EBT Account History

Current Cards

Name	Recipient Type	Card Number	Access Type	Status
<input type="text"/>	Primary	<input type="text"/>	Cash & CalFresh	Issued

Figure 2.2.2.7 – CalSAWS EBT Account Detail Page

CalSAWS Case Name: Case Number: Journal Tasks Help Resources Page Mapping Images DCFS Images Log Out

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

Case Summary

Case Number: Go

Person Search

EBT Account Search

EBT Card Detail

*- Indicates required fields

Reissue Edit Close

Card Number: Account Number:

Card Information

Figure 2.2.2.8 – CalSAWS EBT Card Detail Page

CalSAWS

Case Name:

Case Number:

Journal

Tasks

Help

Resources

Page Mapping

Images

DCFS Images

Log Out

Los Angeles

Case Info

Eligibility

Case

Child Care

Resource

Fiscal

Special

Reports

Client

Admin Tools

Journal Search - County of Los Angeles - CalSAWS - Work - Microsoft Edge

https://sys1.calsaws.net/c-iv/utilities/Journal/search?Y3R4Q2FzZUIk=ODE0MTkwMDk3t&Y3R4Q2FzZU51bWJlcg=QjlyTEwyMw==j&Y3R4Q2FzZU5hbWU=Q2FzZSBOYW1h&Y3R...

Journal Search

Case Number:

Resource ID:

Category:

Type:

Initiated By:

Keyword:

Date From:

To:

Results per Page: 25

Search

Search Results Summary

Results 1 - 2 of 2

Case - - Case Name

Template: Classic Add Entry

Date	Type	Description
<input type="checkbox"/> 03/16/2021	Interfaces	
<input type="checkbox"/> 03/11/2021	Interfaces	

Print

With Details

Without Details

Template: Classic Add Entry

Journal Detail

*- Indicates required fields

Case Number:

Case Name:

Case Name

Entry Information

Journal Category: *

Journal Type: *

All

Interfaces

Initiated By:

Method of Contact:

User

Short Description: *

Long Description:

Append:

<<

Append

(03/16/2021 12:51 PM, Alva D Atherton, 19DP15U10R, Eligibility Worker III)

Figure 2.2.2.9 – CalSAWS Journal Detail Page

Journal Search - County of Los Angeles - CalSAWS - Work - Microsoft Edge
 https://sys1.calsaws.net/c-iv/utilities/Journal/search?Y3R4Q2FzZUIk=ODE0MTkwMDk3t&Y3R4Q2FzZU51bWJlZG=QjlyTEwyMw==&Y3R4Q2FzZU51bWJlZG=Q2FzZS80YV11h&Y3R4U3B1Y2lhbENpcnN1bXl

Journal Search

Search

Case Number: Resource ID:

Category: Type:

Initiated By: Keyword:

Date From: To:

Results per Page: Search

Search Results Summary

Results 1 - 2 of 2

Case - - Case Name

Template: Add Entry

Date	Type	Description
<input type="checkbox"/> 03/16/2021	Interfaces	<input type="text"/>
<input type="checkbox"/> 03/11/2021	Interfaces	<input type="text"/>

Print ☐ With Details ☐ Without Details

Template: Add Entry

This Type_1 page took 0.43 seconds to load.

Journal Detail

* - Indicates required fields

Case Number: Case Name:

Entry Information

Journal Category: Journal Type:

Initiated By: Method of Contact:

Short Description:

Long Description:

Classic

<< Preview Save Cancel

(Martina Pennant, 19DP11TDMP, Principal Information Systems Analyst)

This Type_1 page took 0.26 seconds to load.

Figure 2.2.2.10 – CalSAWS Journal Entry Information Page

Entry Information

Journal Category: Journal Type:

Eligibility

Batch EDBC

Initiated By: Method of Contact:

User

Contact Center

Short Description:

EBT Replacement

Long Description:

Classic

Customer authenticated on IVR. EBT Replacement Card requested and issued via mail. Transaction completed by BOT. |

Figure 2.2.2.11 – CalSAWS Journal Detail Page

Journal Search - County of Los Angeles - CalSAWS - Work - Microsoft Edge

https://sys1.calsaws.net/c-h/utilities/journal/search?Y3R4Q2FzZUlk=ODE0MTkwMDk3Y3R4Q2FzZU51bWJlZG=QjlyTEwyMw==&Y3R4Q2FzZU51bWJlZG=Q2FzZSBOYWIth&Y3R4U3B1Y2IhbENpcnN1bXl

Journal Search **Journal Detail**

* Indicates required fields

Case Number: [] Resource ID: []

Category: [All] Type: [All]

Initiated By: [All] Keyword: []

Date From: [03/01/2021] To: [09/01/2021]

Results per Page: [25] Search

Search Results Summary Results 1 - 2 of 2

Case - [] - Case Name

Template: * Classic Add Entry

Date	Type	Description
03/16/2021	Interfaces	[] Append
03/11/2021	Interfaces	[]

Print With Details Without Details

Template: * Classic Add Entry

This Type_1 page took 0.43 seconds to load.

Journal Detail

Case Number: [] Case Name: []

Entry Information

Journal Category: * Eligibility Journal Type: * Batch EDBC

Initiated By: User Method of Contact: Contact Center

Short Description: * EBT Replacement

Long Description: *

Classic

Customer authenticated on IVR. EBT Replacement Card requested and issued via mail. Transaction completed by BOT.

<< Preview **Save** Cancel

(Martina Pennant, 19DP11TDMP, Principal Information Systems Analyst)

This Type_1 page took 0.26 seconds to load.


2.2.3 Description of Changes

The RPA will take the following steps when the IVR requests an EBT Card replacement

1. Access CalSAWS - <https://web.calsaws.net/c-h/utilities/Homepage/view>
 - a. See Figure 2.2.2.1
2. Enter the RPA Account username
3. Click the "Log In" button
 - a. See Figure 2.2.2.2
4. Enter the RPA Account Password
5. Click the "Log In" button
 - a. See Figure 2.2.2.2
6. Click on the Accept button
 - a. See Figure 2.2.2.3
7. Click on Case Number Field
8. Enter Case Number
9. Click "Submit" button
 - a. See Figure 2.2.2.4
10. Click on "EBT Account List"
 - a. See Figure 2.2.2.5
11. Click on Account number hyperlink
 - a. See Figure 2.2.2.6
12. Click on Card Number hyperlink
 - a. See Figure 2.2.2.7
13. Click the Reissue Button
 - a. See Figure 2.2.2.8

14. Click the Journal tab
 - a. See Figure 2.2.2.9
15. Click Add Entry
 - a. See Figure 2.2.2.9
16. Populate Journal Entry details
 - a. See Figure 2.2.2.10
17. Click Save on Journal Entry
 - a. See Figure 2.2.2.11

3 SUPPORTING DOCUMENTS

Number	Functional Area	Description	Attachment
1	IVR Application	Call Flow Updates to county inbound IVR	 CA-254796 - Automated EBT Carc

4 REQUIREMENTS

4.1 Project Requirements

REQ #	REQUIREMENT TEXT	How Requirement Met

4.2 Migration Requirements

DDID #	REQUIREMENT TEXT	Contractor Assumptions	How Requirement Met

5 MIGRATION IMPACTS

SCR Number	Functional Area	Description	Impact	Priority	Address Prior to Migration?

6 APPENDIX
