# CalSAWS

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

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

| 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<br>UAT: EBTReplacementProcess_AZ_Connect<br>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



**Figure 2.2.2.1 – CalSAWS Login Screen**



**Figure 2.2.2.2 – CalSAWS Password Screen**

**Figure 2.2.2.3 – CalSAWS Security Screen**
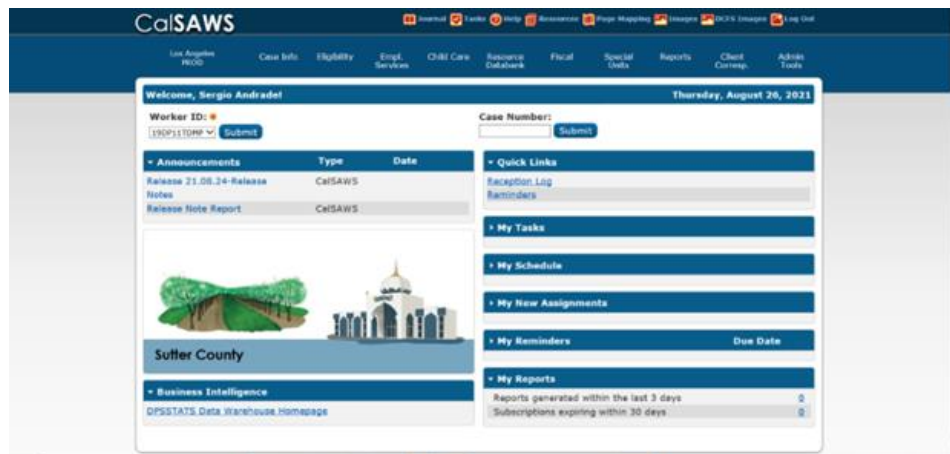


**Figure 2.2.2.4 – CalSAWS Home Page**

**Figure 2.2.2.5 – CalSAWS Case Summary Page**



**Figure 2.2.2.6 – CalSAWS EBT Account List Page**

**Figure 2.2.2.7 – CalSAWS EBT Account Detail Page**



**Figure 2.2.2.8 – CalSAWS EBT Card Detail Page**

**Figure 2.2.2.9 – CalSAWS Journal Detail Page**

**Figure 2.2.2.10 – CalSAWS Journal Entry Information Page**



**Figure 2.2.2.11 – CalSAWS Journal Detail Page**

## 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-iv/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 | PDF<br>CA-254796 - Automated EBT Card |
| | | | |

# 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