



[CA-226701] Create Flexible CW/CF RE Appointment Batch Job for Migration Counties

Issue Type:	SCR	Team Responsible:	Batch/Interfaces	Assignee:	Unassigned
Fix Version/s:	[23.09]	Designer Contact:	Shining Liu	Change Type (SCR):	New Policy
Minor Version:		Expedite Changes:	No	Estimate:	217
Reporter:	Caroline Bui	Regulation Reference:	ACL 21-24	Created:	03/23/2021 03:14 PM
Status:	Committee Review	Impact Analysis:		Outreach Required:	
Policy/Design Consortium Contact:	Caroline Bui	Training Impacted:		Funding Source:	CalSAWS M&E
Project Phase (SCR):	Production	Funding Source ID:			
Other Agency Cross Reference:					

Current Design: Currently when the customer reporting status is updated to Incomplete status, there are incomplete reason that the user will need to select. Two of those options that the user can select are 'Dated Before Last Day of SAR Report Month' and 'Dated Before Last Day of Report Month'.

Currently, there is an RE Appointment scheduling batch job (PBXXC907) for regular telephone interviews only.

Currently, there is an Outbound IVR campaign for Appointment Reminder and Missing Document. The Missing Document campaign checks for missing SAR7s only – there is no equivalent campaign for RE packets. The results of these IVR calls are processed by an Inbound IVR Call Results Reader (PI00M300), where a call log and journal entry are generated.

- Request:**
1. Remove the 'Dated Before Last Day of Report Month' and 'Dated Before Last Date of SAR Report Month' option from the PR - Incomplete Reasons block on the Customer Reporting Detail page and Customer Reporting Detail - Override page.
 2. Create a new batch job to schedule flexible CW/CF RE appointments for Migration Counties.
 3. Regression test the existing packet generation jobs in order to confirm that appointment times are populated as expected.
 4. Update the verbiage for journals and call logs generated for IVR phone messages sent to customers about missing SAR7s.

Note: GEN 102 requirement moved to CA-246603.

- Recommendation:**
1. Update the Customer Reporting Detail and Customer Reporting Detail – Override page to no longer display the 'Dated Before Last Day of SAR Report Month' and 'Dated Before Last Day of Report Month' from the PR - Incomplete Reasons block when the report status is set to Incomplete.
 2. Create a new batch job to schedule flexible CW/CF RE appointments for Migration Counties.
 3. Regression test the existing packet generation jobs in order to confirm that appointment times are populated as expected.
 4. Update the verbiage for journals and call logs generated for IVR phone messages sent to customers about missing SAR7s.

Outreach Description:
Operational Impact: