

CalSAWS | Notes from IVR/Contact Center Committee Meeting

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|---------------------------------|---|--|
| Date: March 22, 2023 | Notes Location: Microsoft Teams | |
| Time: 9:00 am – 12:00 pm | Meeting Called by: Darcy Alexander | |
| Attendees: | <div> <div> R1 <input checked="" type="checkbox"/> Karen Elizondo R1 <input type="checkbox"/> Celeste DuBay R1 <input checked="" type="checkbox"/> Nancy Rodriguez R1 <input type="checkbox"/> Monica Castillo R1 <input checked="" type="checkbox"/> Norma Feters R2 <input checked="" type="checkbox"/> Cathy Collins R2 <input checked="" type="checkbox"/> Shawna Reed R2 <input type="checkbox"/> Gina Arthurs R2 <input checked="" type="checkbox"/> Chris Craig R2 <input checked="" type="checkbox"/> Ilda Torrez R2 <input checked="" type="checkbox"/> Stacy Bruemmer R3 <input checked="" type="checkbox"/> John Edwards R3 <input type="checkbox"/> Dylan Sampson R3 <input type="checkbox"/> Yvonne Braga R3 <input type="checkbox"/> Julia Foster R4 <input checked="" type="checkbox"/> David Mata </div> <div> R4 <input type="checkbox"/> Monica Vega R4 <input checked="" type="checkbox"/> Brian Bumpus R4 <input type="checkbox"/> Aurora De Jesus R4 <input checked="" type="checkbox"/> Puninder (Roni) Dhillon R4 <input checked="" type="checkbox"/> Monique Micenheimer R4 <input checked="" type="checkbox"/> Mark McAlister R5 <input checked="" type="checkbox"/> Cori Robertson R5 <input checked="" type="checkbox"/> Briyit Carbajal R5 <input type="checkbox"/> Cecilia Montano R5 <input type="checkbox"/> Norma Meza R5 <input type="checkbox"/> Casey Bartolomucci R5 <input checked="" type="checkbox"/> Jason Garrett R6 <input type="checkbox"/> Tracy Kinshasa R6 <input type="checkbox"/> Jacqueline Larios-Becerra R6 <input checked="" type="checkbox"/> Karina Estrada R6 <input checked="" type="checkbox"/> Narine Tervartanyan R6 <input checked="" type="checkbox"/> Jason Reyes </div> <div> CS <input checked="" type="checkbox"/> Jared Kuester CS <input checked="" type="checkbox"/> Stacey Xiong CS <input checked="" type="checkbox"/> Logan Pratt CS <input checked="" type="checkbox"/> Danielle Benoit CS <input type="checkbox"/> Gerald Limbrick CS <input type="checkbox"/> Matt Lower CS <input checked="" type="checkbox"/> John Dray CS <input type="checkbox"/> Rhiannon Chin CS <input type="checkbox"/> Erick Arreola CS <input checked="" type="checkbox"/> Kimberly Sinclair CS <input type="checkbox"/> Don Coffey CS <input type="checkbox"/> Jacob Olson CS <input type="checkbox"/> Carlos Cuenca CS <input type="checkbox"/> Julie Conwell – RM Sponsor CS <input type="checkbox"/> CDSS </div> </div> | |

Notes Taken By: Region # 3 Responsible for Meeting Notes – John Edwards - Shasta

| Agenda Topic: | Important Points |
|--|--|
| Welcome/New Members: | <ul style="list-style-type: none"> • Introduction done for new members. • Monica Vega – Kings County – Region 4 • Menti used for attendance and reminders given throughout meeting. |
| Meeting Notes: <ul style="list-style-type: none"> • Region #3 Identified as the one responsible for taking notes. | <ul style="list-style-type: none"> • Region #3 – John Edwards – Shasta County • Notes are due to the Contact Center Facilitator on March 29, 2023. |
| <ul style="list-style-type: none"> • Migration Updates: <ul style="list-style-type: none"> ◦ Wave 2 | <ul style="list-style-type: none"> • Contact Center Team • Wave 2 is Live in CalSAWS • Lessons learned: training disseminated; model office can be updated/improved. • Wave 3 update will happen in our May meeting. • For call center counties: the subsequent waves will likely happen in a similar fashion – cut-over weekend beginning on a Friday at about 3pm • Most enhancement requests CERs won't be able to be done until after the migration. |

Agenda Topic:

Important Points

- **CER CA-257851 - Change the Courtesy Call Back Customer Return Call Attempts**

- Contact Center Team
- Submitted by Placer County
- Change the global limit of courtesy call back attempts from three down to two.
- Question – can courtesy call back feature be set by time of day to stop offering call backs in the IVR; Yes. The call back attempts will still go through after the call backs are no longer available to new customers in the IVR.
- For secondary or tertiary call back attempts, etc., a customer's call back attempt will still be put at the top of the agent list.
- A customer's voicemail counts as a successful call back attempt.
- The vote to move this to an SCR for design discussion. All Regions voted to move this CER to an SCR.

- **CER CA-257832 – Change the Telephonic Signature Recording Time Limit to 15 Minutes**

- Contact Center Team
- Telephonic signature through the CalSAWS app
- Currently the system times out at 10 minutes and ends the call. This would extend the time out limit to 15 minutes.
- The vote to move this to an SCR for design discussion. All Regions voted to move this CER to an SCR.

- **CER CA-257298 – Change the IVR Language for WTW from Reimbursement to Issuance**

- Contact Center Team
- Changing language on the IVR for WTW from reimbursements to payments
- The vote to move this to an SCR for design discussion. Majority of Regions voted to move this CER to an SCR.
- Committee Agrees to change verbiage from Issuance to Payment but will finalize verbiage during design phase.

- **CER CA-252438 – Change Admin Page to Update CCB by Queue**

- Contact Center Team
- Currently the courtesy call back queue feature is either 'on' or 'off' for all queues; this design would provide the option to set the courtesy call back feature per queue.
- The vote to move this to an SCR for design discussion. Majority of Regions voted to move this CER to an SCR.

Agenda Topic:

Important Points

- **SCR-CA-254796 – Automated EBT Replacement**
- **Voting Results/Discussion**

- Contact Center Team
- Committee has requested the design be redone and the counties be given an opt in/opt out option per a CRFI. Time frame in flow would be 90 days and any EBT replacement requested more than once would go to worker.
- Committee to receive updated design document on Friday March 31, 2023, for the Counties to review individually prior to Committee Meeting on April 5, 2023.
- Person ID used to track if the individual has previously requested an EBT card within the last 90 days. If yes, the request would be moved to a worker for review.
- Counties could still maintain an opt-out of the pick-up option of the EBT card.
- Committee told a CRFI will be sent to all counties requesting they opt-in/opt-out of the pick-up option. Informally, all regions prefer to add this to the design as an option.
- New meeting for 04/05 9:30am was decided to continue discussion for a reworked design.
- A formal vote was not made on this SCR.

- **ECCP Update:**

- Contact Center Team
- Danielle has sent out to all formerly C-IV counties and has sent timeline to them for cutover to eCCP from Custom CCP. First Phase is RCC Only Counties which is Merced and San Joaquin.
- First Wave in May 2023, Second Wave in July 2023, Third Wave in September 2023, and Fourth Wave is December 2023 including San Bernardino.

- **Walk-on Topics/Questions:**
 - **SCR CA-251878 – Supervisor Email Notification in Admin Page - Let the Committee know this will be emailed to Committee for voting.**
 - **SCR CA-255445 Enhance Text Messaging Functionality for MC RE Packets.**

- Contact Center Team
- **SCR CA-251878** Multiple email addresses can be entered on the Contact Center Admin page, including distribution list email addresses. Security permission can be set to admin roles. 251878 will be sent out shortly as an email vote.
- **SCR CA-255445** this is an FYI issue from the MC committee.

Action Items:**Action Items**

| Action Items | | Due Date | Responsible Party |
|--------------|--|----------|-------------------|
| 1 | | | |
| 2 | | | |
| 3 | | | |

Darcy will schedule a new meeting for April 05, 2023, 9:30 AM – 11 AM to continue the discussion, and possible voting, on SCR-CA-254796 (IVR EBT replacement):

Darcy will send the updated SCR design prior to the meeting, as well as the new meeting invitation.

Next Scheduled Meeting – Teams – May 24, 2023, 9:00 AM – 12:00 PM:

Region 4 will be responsible for meeting notes.

Proposed Monthly Meeting Schedule:

| Meeting Date | Meeting Time | Cancelled/Scheduled |
|--------------------|--------------------|---------------------|
| May 24, 2023 | 9:00 AM – 12:00 PM | Scheduled |
| July 26, 2023 | 9:00 AM – 12:00 PM | Scheduled |
| September 27, 2023 | 9:00 AM – 12:00 PM | Scheduled |
| November 15, 2023 | 9:00 AM – 12:00 PM | Scheduled |
| January 24, 2024 | 9:00 AM – 12:00 PM | Scheduled |