

CalSAWS | Notes from IVR/Contact Center Committee Meeting

Date: April 5, 2023	Notes Location: Microsoft Teams	
Time: 9:00 am – 12:00 pm	Meeting Called by: Darcy Alexander	
Attendees:	R1 <input checked="" type="checkbox"/> Karen Elizondo R1 <input checked="" type="checkbox"/> Celeste DuBay R1 <input checked="" type="checkbox"/> Nancy Rodriguez R1 <input checked="" 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"/> 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 checked="" type="checkbox"/> Dylan Sampson R3 <input type="checkbox"/> Yvonne Braga R3 <input checked="" type="checkbox"/> Julia Foster R4 <input checked="" type="checkbox"/> David Mata R4 <input type="checkbox"/> Monica Vega	R4 <input checked="" type="checkbox"/> Brian Bumpus R4 <input type="checkbox"/> Puninder (Roni) Dhillon R4 <input checked="" type="checkbox"/> Mark McAlister R5 <input type="checkbox"/> Cori Robertson R5 <input checked="" type="checkbox"/> Frank Guerrero R5 <input checked="" type="checkbox"/> Briyit Carbajal R5 <input checked="" 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 checked="" type="checkbox"/> Jacqueline Larios-Becerra R6 <input checked="" type="checkbox"/> Karina Estrada R6 <input checked="" type="checkbox"/> Narine Tervartanyan R6 <input type="checkbox"/> Jason Reyes
		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

Notes Taken By: Region # 4 Responsible for Meeting Notes – Brian Bumpus - Stanislaus

Agenda Topic:	Important Points
Welcome/New Members: Monica Vega – Kings County – Region 4	<ul style="list-style-type: none"> • Introduction done for new members. • Menti used for attendance and reminders given throughout meeting.
Meeting Notes: <ul style="list-style-type: none"> • Region #4 Identified as the one responsible for taking notes. 	<ul style="list-style-type: none"> • Region #4 – Brian Bumpus - Stanislaus • Notes are due to the Contact Center Facilitator on April 12, 2023.
<ul style="list-style-type: none"> • SCR-CA-254796 – Automated EBT Replacement - Revised <ul style="list-style-type: none"> ○ Discussion/Vote 	<ul style="list-style-type: none"> • 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. • Ad-Hoc Committee Meeting scheduled for April 5, 2023, from 9:30 to 11:00 am to bring updated design to the Committee for review and voting. • Committee to receive updated design document on Monday April 3, 2023, for the Counties to review individually prior to Committee Meeting

- Update to design, Counties will not be able to opt out entirely from this SCR but can only opt out of having cards picked-up in the county office.
- San Bernardino stated they already had an EBT IVR Call flow and asked if this would change what they have in place now? Response yes, it will follow the new design SCR CA-254796.
- Request made for homeless option which Jared updated and added an option 3 to transfer homeless customers to worker.
- Change requested to add county specific exit reason when customers have exceeded EBT Issuances to direct all the worker or EBT Vendor based on County Preference.
- Request made to adjust language for end of day pickups. Example: Offices close at 5, our last EBT pick-up is at 4:30. If customer calls at 4:30 can they be told pick-up is the next day. Jared agreed to adjust the language for this.
- Request made to reword "msg_C19_RPA_Mail_Success" to state that the counties need two to three days processing time prior to the card being mailed out. Jared said he had no issue with these changes.

Committee met again on April 5, 2023, with updates made to design and call flow to again ask for a Committee Vote since complete tie above. Five Regions voted Yes. One Region has voted No. SCR has passed since majority of regions voted to approve SCR with changes.

Design changes include counties can opt out for pick-up of EBT Cards, Card Issuance is sent to worker if another EBT card has been issued within 90 days, County Specific to choose exit reason for homeless customers.

- CRFI will be sent with the following options:
 1. Counties can opt out of have pick-up of EBT cards as an option.
 2. County Specific Exit Reason to be chosen for Homeless Customers.
- Vote retaken to approve SCR, all Regions voted Yes, except region 5 who voted No.
- SCR was approved with a majority of votes.
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- **SCR CA-255969 – Voice Bot**
 - **Design Discussion/Vote**

- Contact Center Team
- All counties will receive a Authentication Bot and a Welcome Bot and will be placed in the Global

Agenda Topic:

Important Points

Settings for all counties so placement in the counties call flow will be the same for all.

- English and Spanish only languages supported initially. Other languages may be supported later.
- Daily reports will be provided.
- Committee requested Call Flow be sent out with Design and voting to be done by email. Committee told these should be email to them by Friday April 7th with the votes due by April 21st.

Walk-on Topics/Questions:

- there are some Text messaging SCRs from the state that will be sending to them as FYIs. Also, we will be sending them a reminder on how to turn off text messages (via automated actions) in the next week or so to share with their regions.

- Contact Center Team
- Text Messaging SCRs coming from the State. Committee told these would be sent to the Committee as an FYI as well as information on how to turn off/on these text messages.

Action Items:

Action Items

Action Items	Due Date	Responsible Party
1 SCR CA-255969 call flow information to be sent to counties for review.	April 7, 2023	Darcy
2 Counties will review SCR CA-255969 and be ready to vote by April 21 st .	April 21, 2023	RCM's
3		

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

Region 5 will be responsible for meeting notes.

Proposed Monthly Meeting Schedule:

Meeting Date	Meeting Time	Cancelled/Scheduled
April 5, 2023	9:30 AM – 11:00 AM	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

