

SCR #	Summary	Created Date	Other Agency Cross Reference	Change Type	Team Responsible	Committee Priority	Current Design	Request	Recommendations
CA-211908	Lobby Mgmt: Update Lobby Monitor to send customers back to waiting status	11/14/2019	CV-7341	Enhancement	Online	Yes	Lobby Monitoring allows the users to call Monitors using a call icon and display it on a corresponding computer monitor.	If the customer needs to be seen by more than one worker a new visit must be logged.	Document the content as follows: 1) Allow the visit to return to a waiting status so that another worker can be called through the monitor on the same visit. Update the Reception Log so that Users have an option to trigger a "customized call" on the Lobby Monitor.  Update the Lobby Monitor Detail page to include a new section for custom calling configurations. Counties should be able to configure this at an office level. •Users with appropriate security rights should be able to enter custom text in a text box. •Examples of custom pages could be: •"Now serving the next customer at window number 2." •"Next customer to desk 15."
CA-212494	Lobby Management: Update Lobby Monitor Call Functionality	12/20/2019	CV-101293	Enhancement	Online	Yes	The current Lobby Monitor functionality can only be utilized for a customer who has been checked in and has received a number for their visit. The location on the Lobby Monitor detail page also cannot be sorted in any preferred way.	Expand the Lobby Monitor functionality so that Counties can choose to page a customer who has been checked in and/or page a customer who may not have been checked in yet. There should be no impact to Counties/Users who currently utilize the existing Lobby Monitor system. Counties would like the ability to sort the Reception Location order based on their office needs.	User should be able to preview the audio as well as determine the language(s) of the Audio and Visual text. Update Lobby Monitor Detail page to allow custom sorting of Reception Locations
CA-213363	Redesign lobby applications to support multiple Operating Systems	2/5/2020		Enhancement	Online	Yes	Lobby Management has multiple applications that are used throughout the counties and supported by CAISAWS such as Lobby Kiosk, Lobby Tablet, Lobby Check-in, and Self Service Kiosk. Not all applications have the same functionality which requires counties to choose the application and associated hardware solution that best meets their needs.	Design a browser-based Lobby Check-in and Kiosk application in a framework that supports devices such as Windows, iOS, and Android. The solution should merge existing functionality from the current applications and add additional enhancements which will need to be defined by the Lobby Management committee.	Ensure Kiosk icons are within ADA 48" reach requirement Ask language at beginning of transaction
CA-215293	Lobby Management: Expansion of Available Languages	4/7/2020		Enhancement	Tech Arch		The current Lobby Management solution only offers two languages for on-screen and voice announcement: Spanish and English.	As an example, Alameda has the following languages that are considered threshold (in addition to English): Spanish, Vietnamese, Cantonese, Mandarin, Farsi, Tagalog and Cambodian.	Provide options for applicants and recipients to be able to select their threshold languages from the lobby management kiosks and other mobile devices (FACT tables, iPad, Samsung Galaxy tablets, etc).  Provide on-screen and voice announcements in the client's threshold language for when a ticket is being called for service. Printed receipts should be generated in the customer's preferred language.
CA-215296	Lobby Management: Update Lobby Devices to populate Worker ID	4/7/2020		Enhancement	Tech Arch		The Worker ID field does not populate in the Reception Log when a client checks in using a lobby device. Users must hover over the Visit Status to view the worker who received the notification. Users are also not able to use the Unit filter if the Worker ID is not populated and must look at each entry individually which impacts wait times in the lobby.	Populate the Worker ID field for a visit when a notification has been sent from a lobby device. Counties would like the ability to run the Kiosk application on Lobby Tablet devices without the need for a user to login, similar to the Lobby Kiosk. Running the application this way will provide counties the flexibility to utilize the Lobby Tablet as a customer facing check-in application or as a handheld device for county users.	Remove requirement to enter user login credentials in order to access Kiosk flow. Ensure Kiosk application does not exit due to inactivity.
CA-215311	Create a Kiosk mode for Lobby Tablet devices	4/7/2020		Enhancement	Tech Arch		Current Lobby Tablet devices require a user to login with CAISAWS credentials to run the Kiosk application. The Kiosk application will time out and end the user's session due to inactivity.	The current Reception Log BI dashboards need to be updated to capture and report additional data available in the Reception Log (Specific data elements TBD by committee ad design). •Counties would like the monthly Document Upload Kiosk Activity Report and FACT Activity Report data added to BI to be accessible on-demand.	
CA-220272	Lobby Management: Add/Update Business Intelligence Reports	9/29/2020		Enhancement	Reports		There is currently a Reception Log BI dashboard that provides historical and real-time data. Counties also receive emailed monthly activity reports for each of their lobby devices. These reports are sent from "performance@calaces.org" on the 1st of each month.	*Complete design details TBD by committee "Document Upload Kiosk Activity Report" and "FACT Activity Report" examples attached.	
CA-221164	Expand the "Now Serving" area of the Lobby Monitor	10/22/2020		Enhancement	Online		Currently, the Customer Facing Dashboard has a "Now Serving" area, which is used to display the most recently paged customer number in the order that they have been paged. To the left of the "Now Serving" section, there is an "Ads" section that displays Ads from the county for customer information to be shared in the lobbies. The "Ads" section has a function to be turned off and on, however when the "Ads" section is opted to be turned off, it leaves a blank space where the Ads were previously displayed and is not used when the "Ads" section is opted to be turned off.	Have the "Now Serving" section expand across the full width of the screen, when the "Ads" section is opted to be turned off.	Design considerations: When performing a Monitor Call, the blank space on the Lobby Monitor is used to display the number/location that is currently being called. Counties may need an option on the Lobby Monitor Detail page to disable this feature so that the Now Serving area can be expanded instead.
CA-221218	Lobby Management - Add customizable threshold for appointment check-ins	11/25/2020	CV-103517	Enhancement	Online	Yes	Utilizing the Kiosk, customers have the ability to check in for appointments at anytime and the appointment status is automatically updated. Example: A Customer with an appt scheduled at 12pm can check in at the kiosk at 8am with no restrictions.	Allow the county to determine how many minutes prior to a scheduled appointment time a customer would be allowed to check in. When a customer attempts to check in earlier than the county determined threshold, a validation message should display advising the customer to speak with a receptionist for assistance.	
CA-221223	Add additional threshold feature to Reception Management Dashboard	11/25/2020	CV-102235	Enhancement	Online	Yes	Currently, the Reception Management Dashboard tracks the amount of reception log entries that are reaching the yellow and red thresholds. In order to view the record associated to the alert users need to locate the record in the Reception Log.  Threshold time notifications are based on visit type. When the visit type meets the escalation time, all workers associated to case are notified even when the notification does not apply to a particular worker.	Add an additional feature on the threshold section in which when you click on the yellow or red threshold indicator and it will direct the user to the visit detail page for the record that has exceeded the threshold limit.  Base the threshold notifications off the prefixes, so the notifications will be sent only to the applicable worker. Add the ability to associate workers (portions) to the Threshold configurations so the notifications will be sent only to the applicable worker(s).	
CA-221227	Kiosk Notifications by Program	11/25/2020	CV-101169	Enhancement	Online	Yes	Notifications sent to C/W from the Kiosk are not worker or program specific, even when the customer has selected a specific program they are inquiring about.	When a customer signs into the Kiosk and select a specific program they have a question about (CALWORKS, CalFresh), the notification is sent to all workers associated to the C/W case, instead of just the worker assigned to the program for which the customer has a question about.	Program the Kiosk so when the customer selects a specific program they have a question about, the notification is sent to the worker assigned to that program.
CA-221228	Text Customer when Number is called to Monitor	11/25/2020	CV-100860	Enhancement	Online	Yes	Through the Reception Log the Worker can do a Lobby Monitor call to direct the customer to a location in the office to be served. Many times the lobbies are busy and Customers may not hear or see their number on the monitor screen.	Allow the customer to Opt-in to a text message to be sent when their number is being called through the Lobby Monitor	
CA-221229	Update Kiosk and Reception Log entries for document drop offs	11/25/2020	CV-100699	Enhancement	Online	Yes	When multiple documents are scanned at the Lobby Kiosk for one customer, each document will display as an individual visit on the Reception Log. This is also causing the Business Intelligence reports and Reception Management Dashboard to display inflated customer visit numbers.  The Lobby Kiosk may timeout during the scanning process if scanning exceeds 30 seconds.	The Reception Log should create only one visit purpose entry when the customer has scanned in multiple documents in one session at the Lobby Kiosk.  Modify the Lobby Kiosk timeout to wait until document scanning has been completed.	
CA-221230	Change wording on Kiosk screen	11/25/2020	CV-11962	Enhancement	Tech Arch		There is an option/button in the Kiosk flow that when selected asks the customer: "Is there anything else I can help you with today?" The majority of customers answer "yes" to the question "Is there anything else I can help you with today?" Each time the customer answers "yes" to this question, a new number is created. In the event a customer happens to answer "yes" to this question multiple times, the customer ends up with multiple numbers making it appear on the Reception Log that more customers are in the lobby than there really are.	Change the wording of this question.	Update on screen wording to display "This request is complete. Can I help you with anything else?" Available on screen options should now be "I'm Done, Print Receipt," or "Return to Main Menu" Add instructions for using the updated alpha-numeric keyboard Update the "Back," "Quit" and language toggle buttons (English/Spanish) so that they are larger and stand out.
CA-221231	Add ability to view multiple offices on Reception Management Dashboard	11/25/2020	CV-11961	Enhancement	Online		Reception Management Dashboard does not allow the user to view multiple offices from one worker ID. County managers are unable to view the Reception Management Dashboard for multiple offices within their county unless they are given multiple worker IDs for each of those offices.	include a drop down of office to select from. (possibly security behind drop down). Dashboard should default to last location selected of logged in user.	Update other screens that may need updating at the time of this SCR Increase the font size of assigned number on the tickets, printed on Kiosk and Tablets.
CA-221232	Allow custom county messages to be added to device receipts	11/25/2020	CV-9396	Enhancement	Online		Receipts printed from lobby devices such as Kiosks and Tablets do not have an option to include a custom message/footer.  When a customer uses the Kiosk, the Message Center notification(s) sent to the worker do not indicate which Kiosk/Office initiated the check-in. This can be confusing for workers when a customer checks in at Location A but the worker receives the notification at Location B.	1) Allow the county to create a custom message. The default will continue to display unless the county creates a custom message: Thank you, please have a seat and listen for your number. Have a good day! 2) Create two text boxes for Counties to create their own custom messages in English a) Create two text boxes for Counties to create their own custom messages in Spanish 3) Create a text box to allow the office to update the Header text that says "County Customer Receipt"  NOTE: County to be responsible for the message and its content County responsible for spelling and grammar County responsible for English and Spanish translations	
CA-221236	Display kiosk location in Message Center and Reception Log	11/25/2020	CV-5786	Enhancement	Tech Arch			Provide the worker with office and Kiosk Location.	1. Update the Hover Tool Tip on the reception log to display Kiosk ID and Location information. 2. The customer receipt should show Kiosk ID information.



CA-269150	Add to Reception Log selecting a different office	10/10/2023	CA-266291	Enhancement	Online		<p>CAISAWS will not let you select the office you want to Add to the Reception Log List. You can only add to the office that your Worker ID is set up on the Position Detail page. Our clerical staff is centralized, where clerical staff can assist other offices when short staff. However, they cannot add to the Reception Log because their profile will only allow them to add to the Reception Log based on their position detail. This limitation prevents us from assisting other offices when they are short-staffed.</p>	<p>We request an enhancement to have a drop-down/selection of offices you want to add to the Reception Log Detail page so workers assisting other offices can log entries. If there are any security reasons this can be a button that can be added in the Worker's Position Detail as something they are allowed to do.</p>
CA-269151	Lobby Management: Change Start button to Language Options	10/10/2023	CA-264820	Enhancement	Online		<p>Justification / Request Summary:</p> <p>JUSTIFICATION: The Lobby Kiosk welcome screen requires customers to click the "Start" button which just leads to the actual flow options assigned to the kiosk. The "Start" button does not serve a purpose other than requiring the customer to click to proceed to the actual options.</p> <p>The Language toggle button is not quite prominently placed; the font size is not very large and it is located off to the top right corner of the screen away from the main screen area for the visit option buttons.</p> <p>REQUEST: As part of the Welcome screen, replace the "Start" button with buttons for the various available languages (currently English and Spanish). Instead of a start button that requires a user to perform a click just to go to the options, the first click can perform a function of starting the language preference.</p> <p>Issue:</p> <p>The Lobby Kiosk welcome screen requires customers to click the "Start" button which just leads to the actual flow options assigned to the kiosk. The "Start" button does not serve a purpose other than requiring the customer to click to proceed to the actual options.</p> <p>The Language toggle button is not quite prominently placed; the font size is not very large and it is located off to the top right corner of the screen away from the main screen area for the visit option buttons.</p> <p>CA-222130 includes a request to: Update the "Back", "Quit" and language toggle buttons ("Español/English") so that they are larger and stand out.</p>	<p>As part of the Welcome screen, replace the "Start" button with buttons for the various available languages (currently English and Spanish). Instead of a start button that requires a user to perform a click just to go to the options, the first click can perform a function of starting the language preference.</p> <p>Having the language options on the Welcome screen also provides more space for when more available languages are added. The language toggle button is helpful to switch between languages even after the language preference is selected.</p>
CA-269152	Lobby Management: Reception Dashboard – Display Currently Serving Data Including Reception Location	10/10/2023	CA-264817	Enhancement	Online		<p>[1] Users overseeing lobby movement/activity cannot easily see the individual ticket movements as a whole, especially which tickets are actively being served at which Reception Locations.</p> <p>Reception Locations "actively serving" a customer are considered to be in either the visit status of "Lobby Monitor Call" or "Meeting Started." The Reception Dashboard does not display detailed data for while the meeting is in progress.</p> <p>[2] The "Current Wait Times" widget is the main widget used by staff who oversee lobby movement/activity, but this widget is visually smaller in size/font compared to the other graphical widgets. If staff are viewing this widget on a monitor placed at a distance instead of directly on the computer they are using, it is difficult to read the ticket number/type font.</p> <p>REQUEST:</p> <p>[1] Add a list to the Reception Dashboard displaying the Reception Locations serving which ticket number and for how long whenever a ticket is in the visit status of "Lobby Monitor Call" or "Meeting Started" (similar to the "Current Wait Times" list).</p> <p>Example:  Currently Serving  LocationTypeMinutes  Window 5H22Apply for Benefits23  Window 1H28Drop Off Documents10  Window 8V29Other/Information1  Window 2V32Other/Information1</p> <p>[2] Make the "Current Wait Times" widget size and font larger. The other widgets as visual graphs can be made smaller to compensate for space. (Potentially make the Reception Dashboard customizable?)</p> <p>Issue:</p>	<p>[1] Add a list to the Reception Dashboard displaying the Reception Locations serving which ticket number and for how long whenever a ticket is in the visit status of "Lobby Monitor Call" or "Meeting Started" (similar to the "Current Wait Times" list).</p> <p>Example:  Currently Serving  LocationTypeMinutes  Window 5H22Apply for Benefits23  Window 1H28Drop Off Documents10  Window 8V29Other/Information2  Window 2V32Other/Information1</p> <p>[2] Make the "Current Wait Times" widget size and font larger. The other widgets as visual graphs can be made smaller to compensate for space. (Potentially make the Reception Dashboard customizable?)</p>