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OCAT System Change Request (SCR):

# OP-2589 Share Feature Questions to Chatbot Response Enhancement

Provided to:

SAWS Consortium

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Ernst & Young LLP

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## Documents Revision Table

Version	Date	Author	Rationale
1.0	01/24/2024	Ernst & Young LLP	Initial approach discussed July 2023 at WTW Committee Meeting; Updated and reviewed again January 2024; this is the result and initial draft of SCR for first review

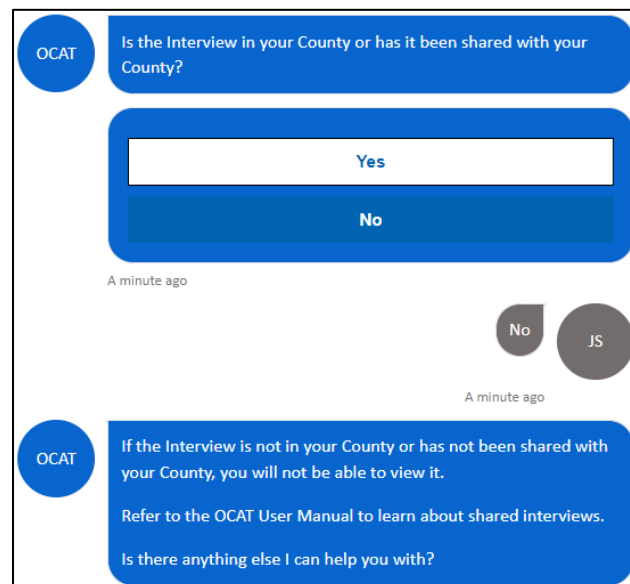
# 1 Introduction

When referring to accessing a completed ASR that is not in their county or has not been shared with their county, the OCAT Chatbot currently refers Users to the OCAT User Manual. The User Manual does not provide the information needed to request the sharing of a completed ASR by another county. This OCAT System Change Request (SCR) documents the enhancement of the response regarding the intra-county ASR share feature in the Chatbot to reference the Users to the OCAT Help Desk for more information.

## 1.1 Current Design

The OCAT Chatbot is a prompt-based, business rules driven response tree to support Users with navigating the OCAT application. It provides menu-driven options for users to select responses and communicate the issues they're experiencing without the need to enter text. The Chatbot is integrated with the OCAT application and available through the OCAT Help Page.

### *Exhibit 1: Current Chatbot Response for Share Feature*



Currently, the Chatbot will ask the User if the interview is in their county or has been shared with their county. If the User responds "No", it will refer Users to the OCAT User Manual for more information regarding the intra-county ASR share feature. The User Manual does not provide the information needed to request the sharing of a completed ASR by another county.

## 1.2 Overview of Change Request

This change request will enhance the response regarding the OCAT intra-county ASR share feature in the Chatbot to reference the OCAT Help Desk for more information instead of the User Manual.

## 2 Proposed Design

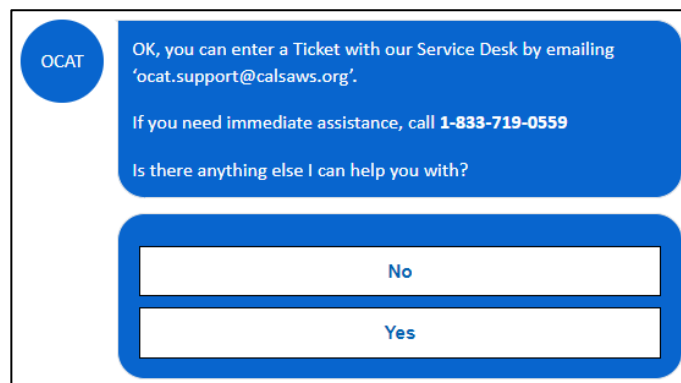
This section details the recommended design for this change request.

### 2.1 Chatbot Response to Share Feature Enhancement

We propose an enhancement to the Chatbot’s response regarding the OCAT intra-county ASR share feature. Instead of referring Users to the OCAT User Manual, the Chatbot response should be updated to refer Users to the OCAT Help Desk for more information regarding the OCAT intra-county ASR share feature.

There is an existing Chatbot response that refers Users to the OCAT Help Desk (Exhibit 2). The Chatbot can be updated to give this response after a User answers “No” to “Is the Interview in your County or has it been shared with your County?”.

#### *Exhibit 2: Future Response Referring User to Help Desk*



#### 2.1.1 Functional Design

Instead of referring Users to the OCAT User Manual, the Chatbot response will be updated to refer Users to the OCAT Help Desk for more information regarding the OCAT intra-county ASR share feature. The response will be updated to the existing Chatbot response which will refer Users to the Help Desk.

##### 2.1.1.1 *Description of Change*



When a User responds “No” to “Is the Interview in your County or has it been shared with your County?”, the Chatbot response will be updated to the response shown in Exhibit 2.

### **2.1.1.2**     *User Access and Management*

The OCAT Chatbot is accessible by all Users. Implementing this change will not change any User access requirements and should be seamless such that Users will not notice a change has been made other than the response regarding the intra-county ASR share feature has been changed.

### **2.1.1.3**     *Assumptions*

None listed.

## **2.1.2 ADA Compliance**

The OCAT design implements accessibility checks for visual accessibility, code quality, and keyboard navigation. The EY team will utilize accessibility code checking development tools such as WAVE and AXE, paired with hands-on human evaluation to ensure the OCAT web pages are accessible.

The design will utilize colors, font, and text from the OCAT Style Guide to provide a consistent, modern, and ADA Compliant user experience.

Describe any additional efforts to ensure ADA compliance.

## **2.1.3 Technical Design**

Describe the technical design of the SCR. Additional sub-sections can be added as needed.

### **2.1.3.1**     *Application Architecture*

Application architecture will remain the same since the change will be made to the chatbot’s response data set.

### **2.1.3.2**     *Infrastructure Architecture*

The infrastructure architecture will remain the same since the change will be made to the chatbot’s response data set.

### **2.1.3.3**     *Assumptions*

The primary assumption is that the other chatbot flows will remain the same once the SCR is completed.



## 3 Testing

This section will provide information on the different testing efforts that will be needed for this SCR.

### 3.1 System Test

This enhancement will be tested by validating the Chatbot operates as designed and validating that the new and existing responses align with the Chatbot Response Flow specifications listed in the appendix. There will be one test case that validates the Chatbot functionality and response flow.

### 3.2 Interface Test

No interface testing is required for this change.

### 3.3 User Acceptance Test

UAT testing will occur in the UAT environment by the Consortium. The Chatbot will be updated in the UAT environment prior to UAT testing and ForgeRock IDs will be remediated for all testers.

### 3.4 Regression Test

No regression test is planned for this change request since no code deployment for OCAT will be needed. The changes being implemented are localized within the Chatbot.

### 3.5 Performance Test

No OCAT application performance test will be executed.



## 4 Proposed Release

This section will include proposed dates for the implementation of this SCR.

### 4.1 Release Timeline

#### 4.1.1 Proposed Dates

The tentative release timeline for the implementation of this SCR is shown below.

#### *Exhibit 3: Proposed Release Timeline*

Task	Timeline
Design	January 2024
Draft SCR	January 2024
Approve SCR	February 2024
Development	February/March 2024
System Test	March 2024
UAT	March 2024
Release	March 2024

#### 4.1.2 Communication

##### 4.1.2.1 *User Communication*

The EY team will draft a Maintenance Notification to be distributed to the CaISAWS Help Desk. The notification will inform Users of the day and time of the OCAT maintenance window and that the Chatbot will be updated. The maintenance window will occur after business hours to ensure there is no disruption to Users who may be accessing reports.

## 5 Impacts and Risks

This section will describe the impacts and risks to implementing this SCR.

### 5.1 Impacts

#### 5.1.1 Documentation Updates

Implementation of this SCR will require updates to the documents below.

##### 5.1.1.1 Deliverable Updates

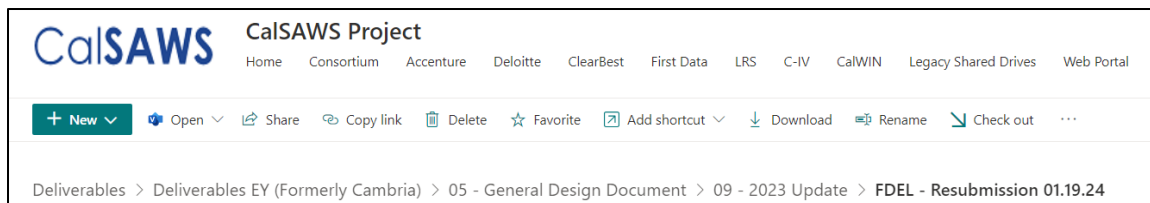
The deliverables that will need to be updated with the implementation of this SCR include the:

- ▶ OCAT General Design Document

##### 5.1.1.2 Specifications Updates

The specifications that will need to be updated with the implementation of this SCR are as follows:

- ▶ **Specifications:** [04. OCAT Chatbot Flows\\_2023 GDD FDEL\\_01.19.24.vsdX](#) see where this file is located below:



The above supplemental materials will be submitted separately as Appendix items upon approval of this SCR.

##### 5.1.1.3 Training Material Updates

No updates to the Training Materials will be needed, as there are no references to the Chatbot.

### 5.2 Risks

No risks are associated with this SCR update. The previous response flow did not guide Users to a resource that had the information needed. The updated response will guide them to a resource that can help them with navigating the share feature, along with providing other information as needed.



## 6 Level Of Effort

This section will detail the hours and roles needed to support all phases of the implementation of this SCR.

### 6.1 Staff Resources and Hours

The following resources will be needed to design, develop, test, and implement this change.

#### *Exhibit 4: Roles, Responsibilities, and Estimated Hours*

Role	Responsibilities	Est. Hours
Business Analyst	<ul style="list-style-type: none"><li>▶ Design</li><li>▶ Test Support</li><li>▶ Deliverable Updates</li><li>▶ Communication</li></ul>	8 hrs.
Tester	<ul style="list-style-type: none"><li>▶ Execute System Test</li><li>▶ UAT Execution or Support</li></ul>	8 hrs.
Developer(s)	<ul style="list-style-type: none"><li>▶ Development</li><li>▶ Bug Fixes</li><li>▶ Deliverable Updates</li></ul>	8 hrs.
Project Manager	<ul style="list-style-type: none"><li>▶ PM Tasks (internal QA, status reporting, and escalations)</li></ul>	3 hrs.

## 7 Appendix

The following supplemental materials will be submitted separately as Appendix items upon approval.

- **Specifications:** [04. OCAT Chatbot Flows\\_2023 GDD FDEL\\_01.19.24.vsdX](#) see where this file is located below:

