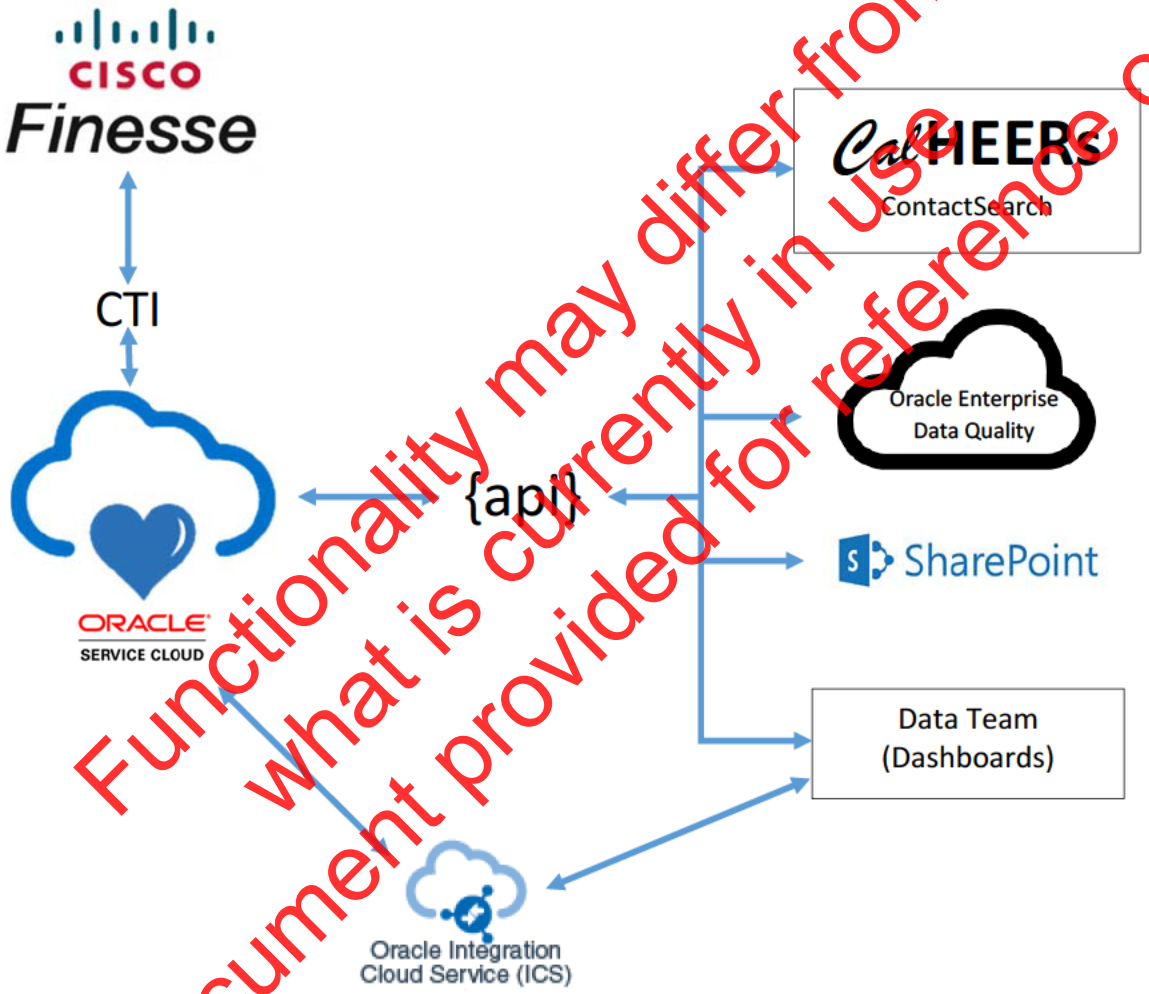
Covered California Oracle Service Cloud Integrations



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CTI Functional Design

Version 1.0

CalHEERS Service Center
Functional Design Document

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2 Target Audience

This document is intended for the following audiences:

- CRM Administrators
- CRM QA

3 Overview

SCRs (Service Center Representatives) will use a softphone to handle all incoming and outgoing phone calls. A softphone is an application installed on the agent's desktop that allows the agent to register their physical desktop phone with the router and receive calls transferred from the IVR.

Information about the call will be stored in RightNow with an association to the incident that the phone call was regarding, the contact who called in and the agent that handled the call. Additional statistics about the call will be stored once the call ends. Agent status information will also be sent to the softphone from RightNow to allow agents to quickly change their status without switching to the softphone application.

A .NET add-in will be created to manage the transfer of information between RightNow and the softphone. This add-in will be implemented as a status bar add-in and will listen for events from the softphone to initiate actions in RightNow.

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3.1 Process Flow

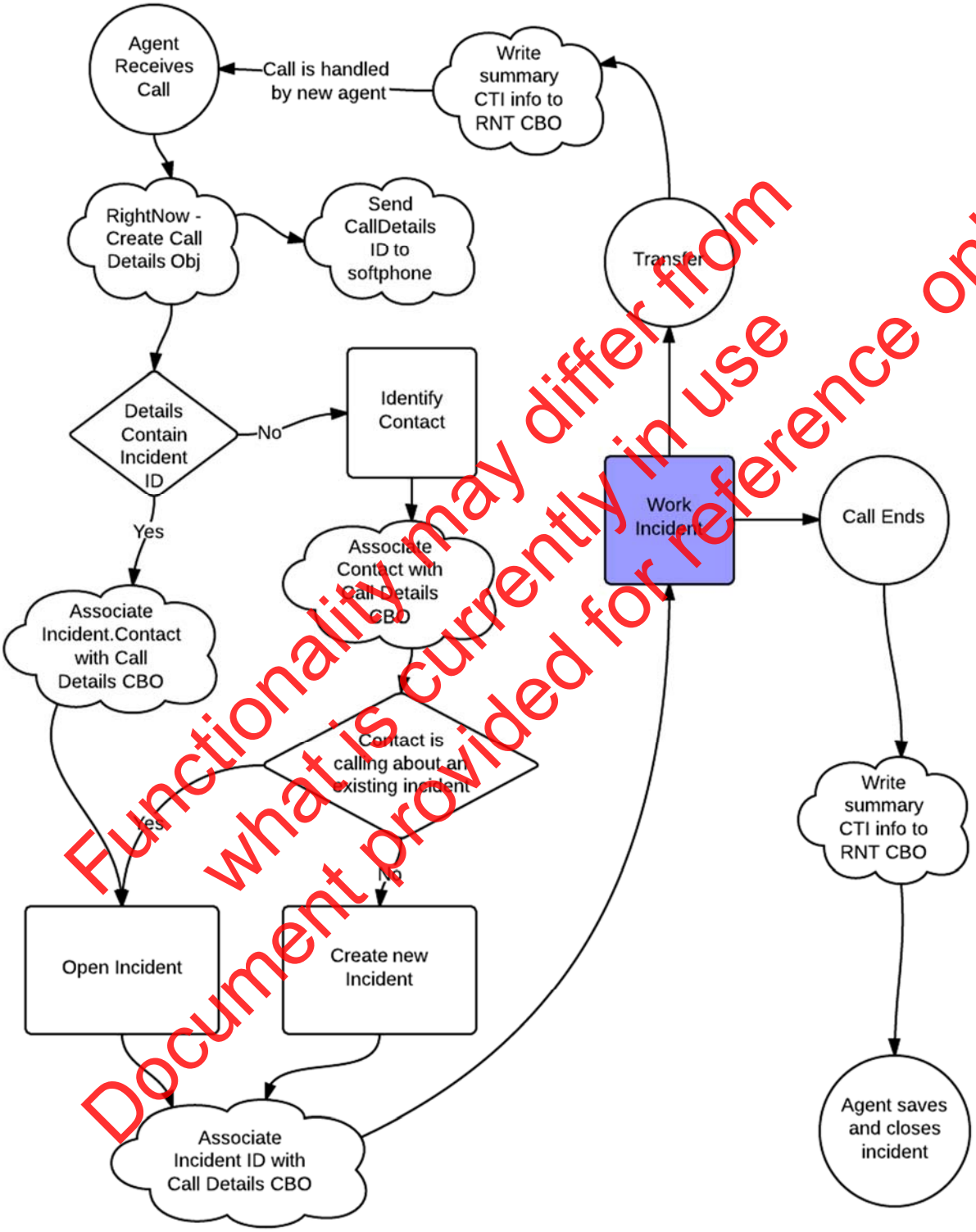

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Figure 1 - Call Management Flow

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4 Call Detail

Call detail information, received from the softphone, will be stored in a set of RightNow Custom Business Objects (CBOs). A relationship to the associated incident, contact and agent will be stored to track historical changes. This information will be available via standard reporting and analytics.

5 User Interfaces

All agent interactions like associating a contact or creating an incident will be handled by workflow in RightNow. A status bar add-in will be created to handle the message transfer between RightNow and the softphone, but will not display much beyond status information. However, it will also be responsible for creating and populating the CallDetail objects and opening the correct workspace/workflow.

5.1 CallDetail Workflow

Below is a representation of the workflow agents will traverse when receiving a phone call.

Figure 2 - CallDetail Workflow & Workspaces

- If the incident ID is populated they will be sent directly to the Incident Workspace
- The contact search workspace will allow the agent to search for the appropriate contact and verify their identity (this will be pre-populated in the case that there is a contact with a matching ANI). The agent can create a new contact if the contact cannot be found.
- Once a contact has been associated a list of incidents associated with the contact will be shown. Only open incidents or those closed within the re-open window will be displayed. The agent can create a new incident if the contact is not calling about an existing one.

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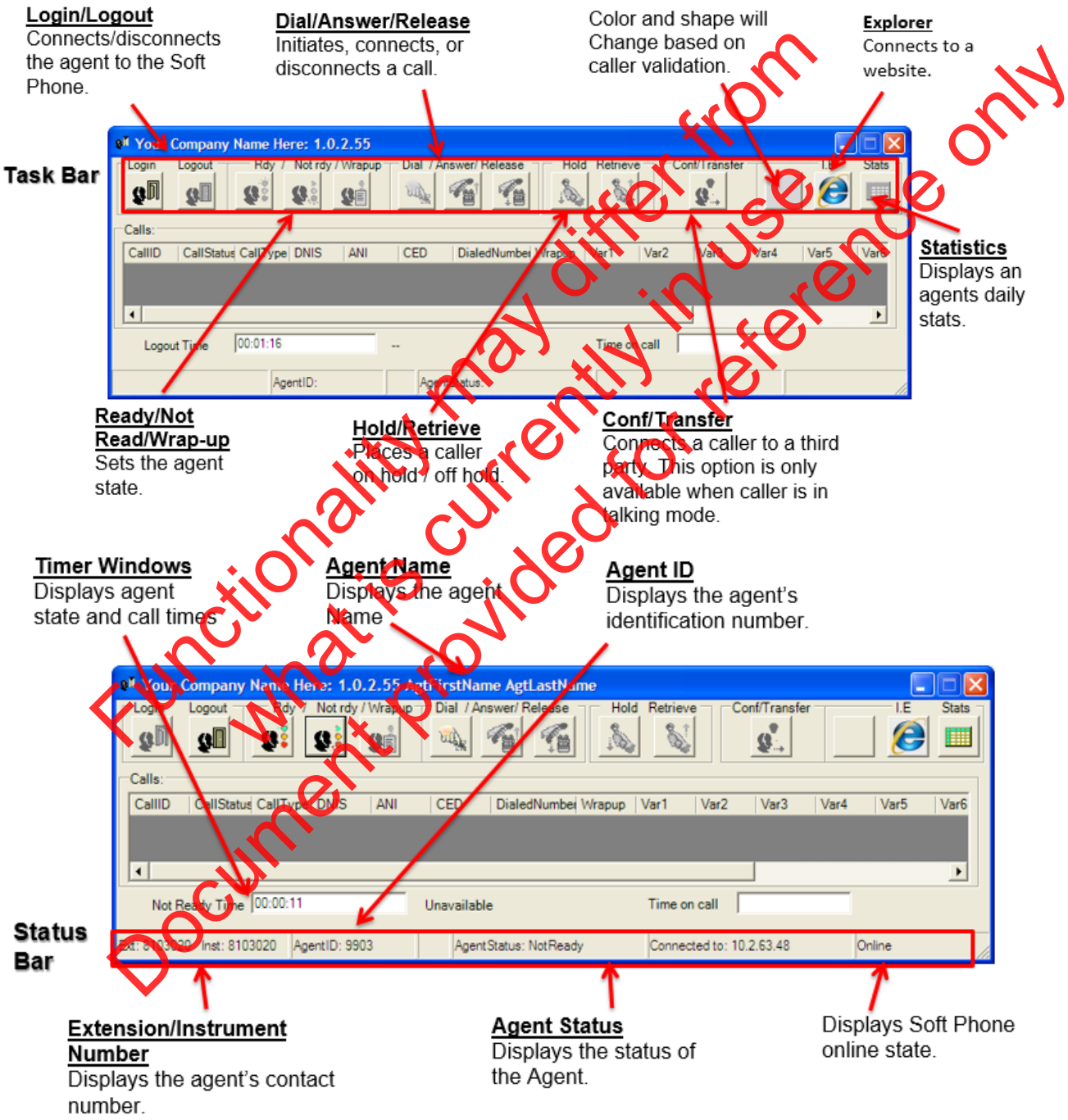
- The agent is redirected to the incident workspace where they will work the incident and eventually end the call

5.2 Call Interaction Interface

The majority of call interactions will be handled by the softphone on the agent's desktop:



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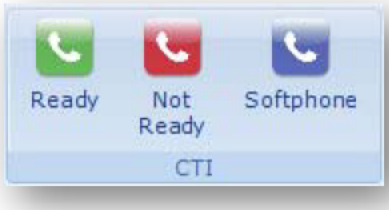
In addition, three helper buttons will be added to the RightNow Global Ribbon to allow common tasks to be completed without having to go to the softphone application.



5.2.1 Ready Button

Clicking this button will send the 'STATUS:READY' message to the softphone. No logic will need to be associated with this action. See Status Changes for a list of actions performed by the smartphone in response to this message.

5.2.2 Not Ready Button

Clicking this button will send the 'STATUS:NOT_READY' message to the softphone. No logic will need to be associated with this action. See Status Changes for a list of actions performed by the smartphone in response to this message.

5.2.2.1 Status Changes

Current Status	STATUS:READY	STATUS:NOT_READY
READY	*No effect*	Agent is prompted for a not ready reason by the softphone and their status is set to **NOT READY**
NOT READY	Agent status is changed to **READY**	Agent is prompted for a new not ready reason by the softphone and their status is set to **NOT READY**
TALKING	As soon as the call ends the agent will be placed in the **READY** state	Agent is prompted for a not ready reason by the softphone and as soon as the call ends the agent will be placed in the **NOT READY** state
WRAP	Agent status is changed to **READY**	Agent is prompted for a not ready reason by the softphone and their status is set to **NOT READY**

5.2.3 Softphone Button

Clicking this button will send the 'FOCUS' message to the softphone and the softphone will respond by bringing itself to the front. No logic will need to be associated with this action.

6 Assumptions

- An SCR can only accept one call at a time

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7 Terms & Definitions

TERM	DEFINITION
SCR	Service Center Representative – agents receiving phone calls and managing incidents
CRM	Customer Relationship Management – the RightNow CX application
CTI	Computer telephony integration – overarching term that encompasses all interactions between a customer telephone call and it's routing to an SCR's desktop
IVR	Interactive Voice Response – responsible for routing calls through a series of decisions resulting in them being transferred to a SCR
WARM TRANSFER	The initial SCR discusses the case with another SCR before transferring the caller to that SCR
COLD TRANSFER	The initial SCR places the caller back into the call queue and the call is handled by the next available SCR

8 Revision History

Date	Version	Author	Description
5/2/20184/24/2013	0.1	[redacted]	Initial Draft
4/26/2013	1.0		Removed unnecessary technical detail

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CONTACT MANAGEMENT

Version 1.3

Covered California Service Center
Functional Design Document

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VERSION CONTROL

Version	Change Description	Modified By	Date
V01	Template creation and Design draft	[redacted]	4/05/2013
V1.1	Post Interaction Management Design Workshop document updates	[redacted]	4/15/2013
V1.2	Updated based on feedback received during the Contact Management Workshop.	[redacted]	4/16/2013
V1.3	Updated to add "Role Type" field to the Contact Workspace and revised "Unassociated Contacts" to "Anonymous Contacts" to align with verbiage determined in the Release 2 FDD	[redacted]	5/21/2013

ASSOCIATED DOCUMENTS

Document	Description	Location
Release 1 Requirements	CRM Release 1 (8/15 to 10/1) Plan and Analyze Requirements Document	SharePoint/Solution Blueprint
Incident Type and Field Behavior Matrix	Document to list Incident Types, Fields, and Field Behaviors for Release 1	SharePoint/Appendix

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1 OVERVIEW

As a part of the Patient Protection and Affordable Care Act (Affordable Care Act) implementation, the State of California established the Covered California Service Center. The Covered California Service Center (Service Center) addresses customer inquiries regarding healthcare policy changes, insurance eligibility, as well as the application, processing and appeals of customer healthcare options. The Oracle RightNow customer Relationship Management (CRM) solution is selected to track Service Center interactions, including customer inquiries (Service) and Marketing/Outreach Initiatives (Sales).

Capabilities in Release 1 include:

- Customer Interaction Management
- Campaign Management
- Contact Management (this document)
- Fulfillment Request Management
- Knowledge Management

Each capability applicable to Release 1, as well as the Quick Sort capability, has a separate Functional Design Document.

Technical Interfaces in Release 1 include:

- I&AM / OAM Security
- Cisco Computer Telephony Integration (CTI)
- Knowledgebase (mini-call center)
- Pitney Bowes Fulfillment Processing

1.1 Purpose

The purpose of this Functional Design Document is to:

- Address the design solution for each requirement and process flow provided by the Accenture Plan and Analyze team for CRM Release 1 (8/15-10/1) in the Requirements Document/Solution Blueprint
- Provide a foundation for the Configuration Team to configure and build the RightNow Workspaces for Covered California Service Center

As a reference tool for configuration, this document serves as the basis for communication between the Client Service Center Team, Accenture Project Team, and the RightNow Application Owner, and its content should be comprehensive but easily understandable

1.2 Terminology

The following terminology will be used in this document:

Acronym	Term	Description
ANI	Automatic Number Identification	The number from which the customer placed the call to the Service Center.
CRM	Customer Relationship Management	The tools and process of managing, tracking, and resolving customer Service interactions.

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CTI	Computer Telephony Integration	A visual display, located near the Softphone, in which the Service Center Representative will see a predetermined set of values about customer intent gathered through the IVR.
IVR	Interactive Voice Response	Customers calling the Service Center are guided through an automated set of menus and prompts used to identify their language preference, and caller intent.
SCR	Service Center Representative	The SCRs at the Service Center skilled to answer, work, and/or respond to customer inquiries.

Table 1: Terminology

1.3 Assumptions

The following assumptions apply to this functional design:

1. This Contact Management Functional Design Document addresses requirements and designs applicable to Covered California Service Center implementation, from Go-Live (August 15th) to October 1st.
2. All Service Center Requirements are documented during the Release 1 Service Center CRM Plan and Analyze phase (Change Request submitted 2/27/2013).
3. For design purposes, field behavior throughout the design document adhere to the following high level behaviors:
    a. If a field is 'Required', it is mandatory in the Workspace, and
    b. If a field is 'Optional', the field may be driven by profile rules, and
    c. Unless a field is identified as 'Read Only', the field value is assumed modifiable.
4. For optimal visibility of the Oracle RightNow Workspace, assume all end users will have access to 21-inch monitors on their desktop, with minimum displayed settings set to a 1600 x 1200 resolution.

1.4 Approval Process

Date	Deliverable	Owner
April 5, 2013	Draft of Contact Management Functional Design due	Accenture Design Team
April 16, 2013	Contact Management Design Workshop • List of follow up items for Accenture to complete Design document due to CalHEERS by EOD April 16, 2013 with Feedback Form	Accenture Design Team CalHEERS
April 22, 2013	Contact Management Feedback Form for Design Due	CalHEERS
April 24, 2013	Contact Management Final Design Sign Off	CalHEERS

Table 2: Contact Management Approval Timeline

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2 CUSTOMER INTERACTION MANAGEMENT

Customer Information Management encompasses the manner by which customer information is searched, displayed, created and maintained within RightNow. Service Centers' actors include:

- Individuals
- Employees
- Employers
- Assisters
- Agents
- Issuer (QHP)
- Other (Media, Government & Partnerships)

The Customer Information Management design section will address all of the requirements identified in the Release 1 Service Center CRM Plan and Analyze phase (Change Request submitted 2/27/2013).

Figure 1 is a high-level flow of a customer interaction with the Service Center, and the basic Incident resolution process.

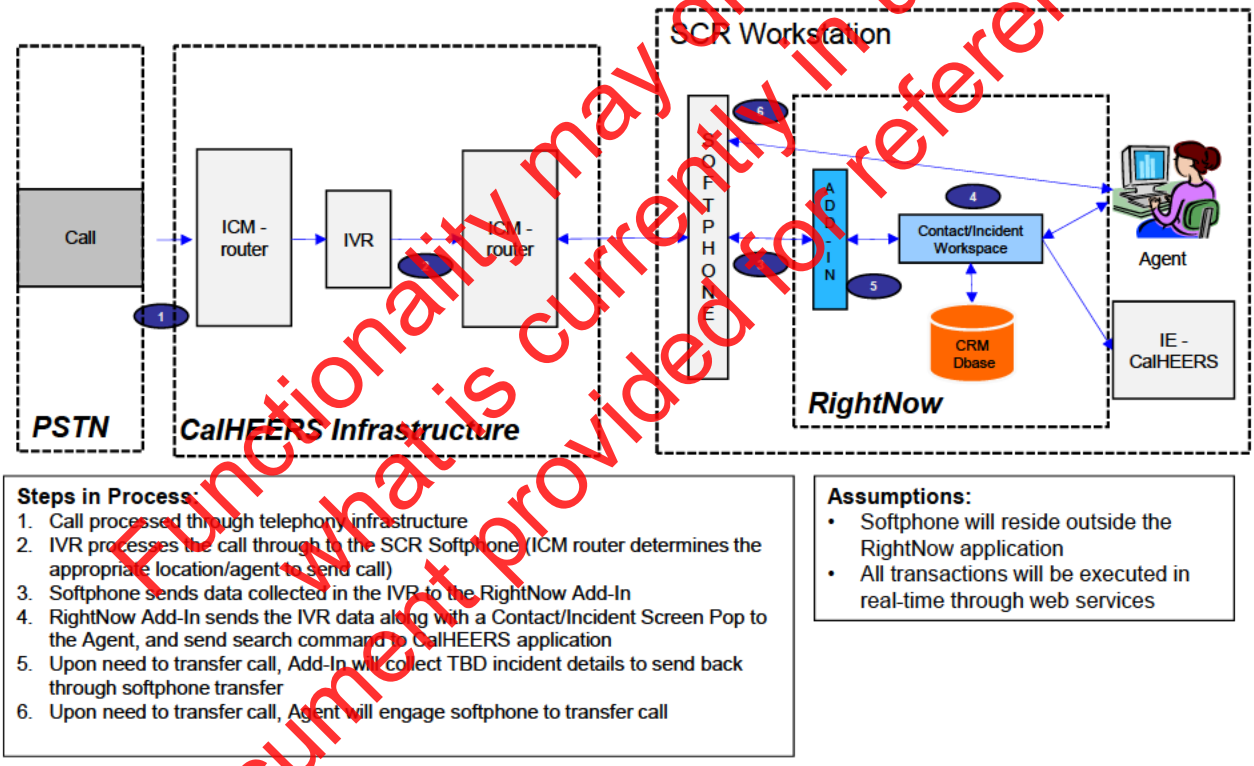

Figure 1: Telephony to RightNow Screen Pop

NOTE: Documentation for the Telephony (IVR and CTI) components of the process above is included in the CTI Functional Design.

2.1 Contacts

RightNow stores information about individual customers and leads. In RightNow, these individuals are referred to as "Contacts." Each Contact has a "Contact Record" in the database. Each contact record

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contains places, called "fields," to store information. For example, each contact record has a field for "Last Name." If a customer's name is John Smith, "Smith" is stored in the Last Name field.

2.2 Contact Processes

The Contact Processes show the method for identifying the appropriate Contact record within CRM if it exists and if not, creating a new Contact Record and viewing the Contact's details and history within the Contact workspace.

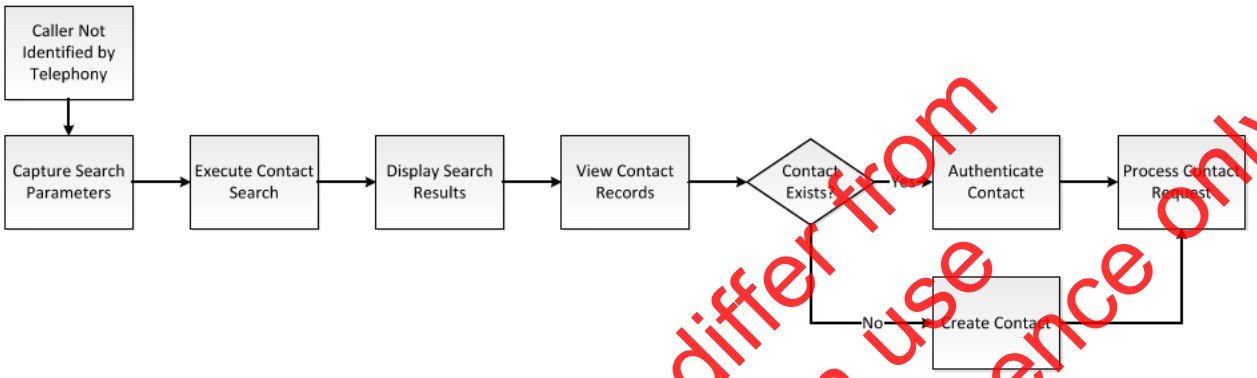

Figure 2: Contact Processes

2.2.1 Capture Search Parameters and Execute Contact Search

RightNow allows for a number of methods to search for Contacts. In Release 1, users can perform Contact Quick Search and Full Search.

Contact Information Gathering Script Page

The Contact Information Gathering Script Page is the initial screen that pops to an SCR upon receipt of a phone interaction. The screen is used to capture any information obtained from the Contact prior to identifying the Contact, if they exist in RightNow at the time of the interaction, or creating the Contact, and to view overarching information associated with the Contact prior to viewing the Contact's specific details. This page contains the following fields:

Field	Description	Field Behavior	Comments
Issue	A field that the SCR can utilize to capture information obtained from the Contact prior to identifying the Contact.	Open text field	
Contact	The Contact's First and Last Name	Read only field once the Contact is identified	This field is populated with the Contact's first and last name once the Contact is selected from the Full Search Filter
Contact Search	A button that opens the Full Search Filter	Button	

Table 3: Contact Information Gathering Fields

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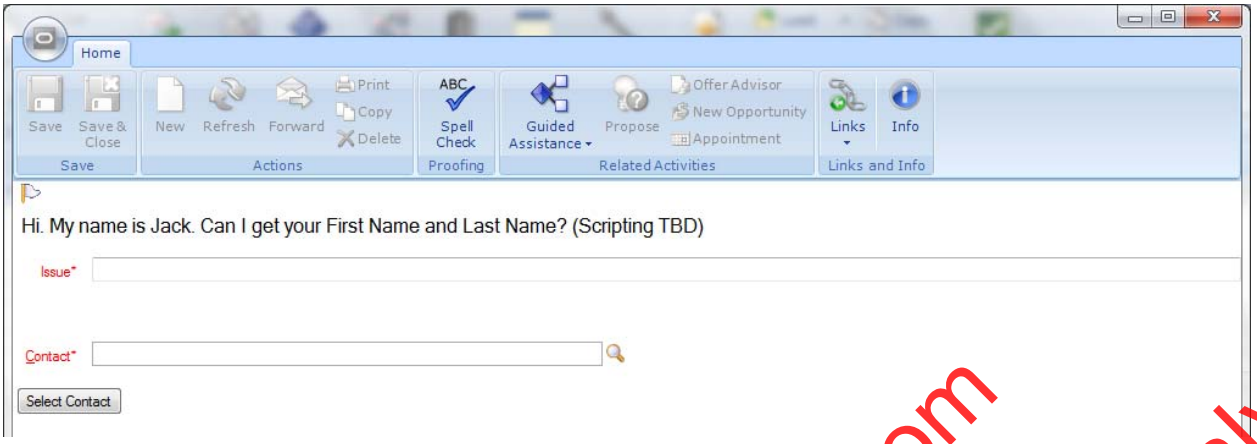

Figure 3: Contact Information Gathering Script Page

Any information captured in the "Issue" field prior to identifying or creating the Contact is included in the Incident once it is created.

Contact Quick Search

The ability to perform a Contact Quick Search is restricted by a staff user's profile. Contact Quick Search is available in the left hand navigation window of the workspace for staff users with profile access. Staff users with Quick Search access can conduct case insensitive[1] searches for Contacts by:

- First Name
- Last Name
- Phone
- Email
- Postal Code

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[1] The System shall allow case insensitive search on Last Name, First Name, alphanumeric IDs, and Company Name.

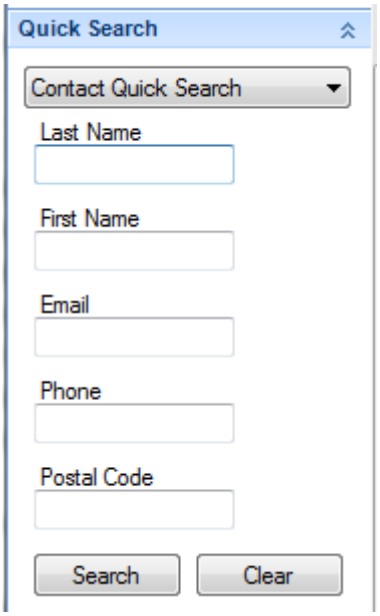

Figure 4: Contact Quick Search Filter

Full Search

Contact Full Search is available for all staff users to perform searches within RightNow. The System allows case insensitive searches for contacts in RightNow by combination of[2]:

- Last Name and First Name
- Last Name, First Name, Phone Number
- Last Name, First Name, and DOB (R2 for DOB)
- Last Name, First Name, Phone Number and Zip Code
- Last Name, Middle Initial, First Name
- Range for date of last contact (pertinent for all contact types)
- Phone Number Only

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[2] The System shall display search results for the purpose of identification including (Refer to R1 Business Requirements)

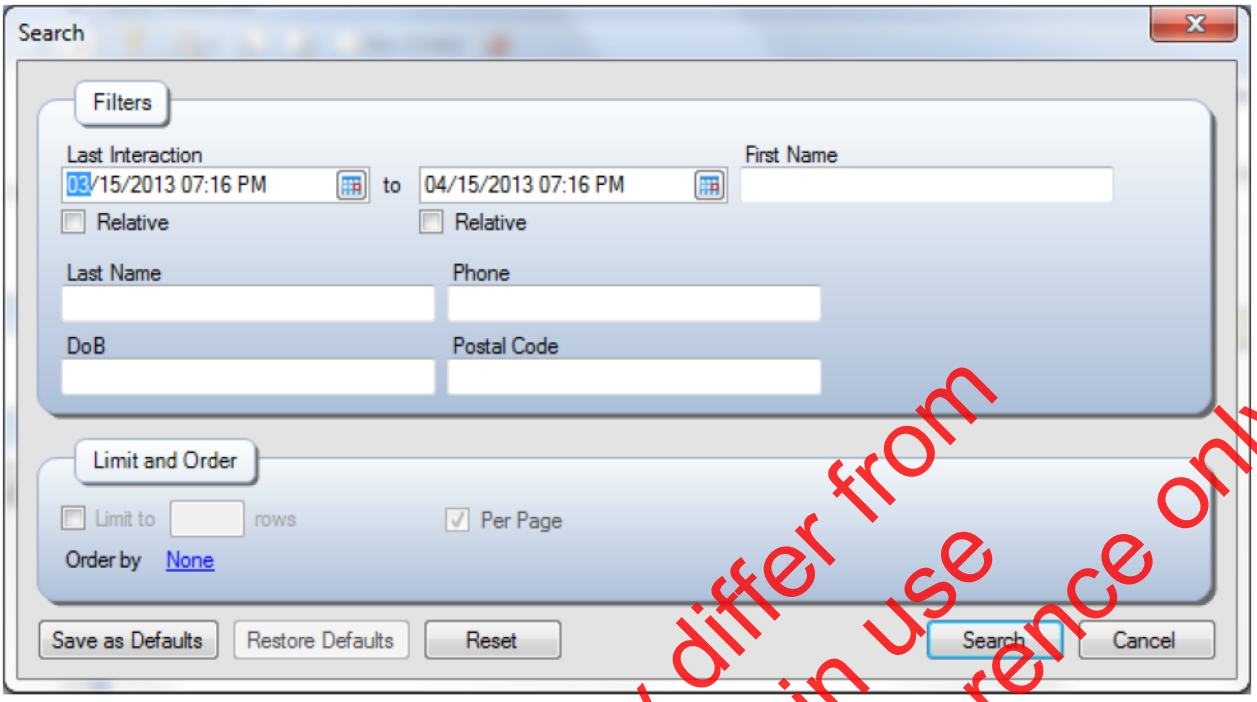

Figure 5: Contact Full Search Filter

NOTE: Release 1 Contact Search only searches the RightNow database of contacts.

The following search fields are validated[3] against predefined formats:

Name	Values Allowed
Zip Code	5 Numbers
Phone Number	10 Numbers
Range for date of last contact	Date Range

Table 4: Search Field Formats Validated Prior Search

2.2.2 Display Results and View Records

RightNow displays results from the Contact Search in a list view with the following fields[4] of information visible:

- Last Name
- First Name
- Middle Initial
- Zip Code
- Role Type
- Phone Number
- Date of Birth

[3] For a manual search, the System shall alert the SCR of any invalid formats.

[4] The System shall display additional contact details (including demographics, contact preferences, current status) and list of previous interactions (incident history), campaign history, attachments, and relationships with individuals and organizations.

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- Email Address

First Name	Middle Name	Last Name	Email Address	Home Phone	Postal Code	DoB	Date Last Updated
Diane	No Value	Daubeneck	dianed@ddis.biz.invalid	707-462-3276	No Value	No Value	03/22/2013 03:31 PM
William	No Value	johnson	No Value	619-966-8159	No Value	No Value	03/18/2013 10:51 AM
Joel	No Value	Soberman	No Value	No Value	No Value	No Value	03/18/2013 10:57 AM
Jacob	No Value	Faturechi	No Value	310-849-8024	No Value	No Value	03/18/2013 11:04 AM
Albert	No Value	Reynolds	areynolds@sterlinginfosystems.com.invalid	916 251-5769	No Value	No Value	03/18/2013 11:07 AM
KB	No Value	added	No Value	No Value	No Value	No Value	03/18/2013 11:10 AM
Jane	No Value	Doe	No Value	Unknown	No Value	No Value	03/18/2013 11:58 AM
Lynn	No Value	Guzey	No Value	310-557-3402	No Value	No Value	03/18/2013 12:25 PM
Harold	No Value	Ross	lawking@earthlink.net.invalid	805 373-7522	No Value	No Value	03/18/2013 01:41 PM
Dan	No Value	Lux	No Value	310-890-8119	No Value	No Value	03/18/2013 02:07 PM
jim	No Value	johnston	No Value	760-244-6565	No Value	No Value	03/18/2013 02:07 PM

Figure 6: Contact Search Results

2.2.3 Authenticate Caller

SCRs are presented with a Script[5] to read to assist in ensuring the caller is appropriately identified prior to proceeding with issue resolution. Scripts are in the Knowledge Management Functional Design and are part of the Build Phase of the project. Contacts are identified using any combination of the fields from the display of search results in section 2.2.2.

2.3 Contact Workspace

The Contact Workspace is used to view, create, or modify information associated with the Contact Record. The ability to make changes to the Contact Workspace is restricted by staff user profile. Upon authentication of a Contact (if the Contact exists in RightNow at the time of the interaction), the system shall display the Contact Workspace to the SCR.

2.3.1 Creating a New Contact

If a Contact does not exist in the RightNow database at the time of the interaction, the system shall populate the information utilized when searching for the Contact to into the Contact Workspace to assist the staff user in creating a new Contact Record

2.3.2 Anonymous Contacts

Oracle RightNow requires a Contact for every interaction however the Service Center needs to be able to address inquiries from customers who do not wish to provide any personal information. When a customer declines to provide their personal information, SCRs can create an Anonymous Contact for the incident that is associated only with the information obtained by the system (the ANI and DNIS associated with the call) and process the customer's inquiry using a Contact that does not have any of the customer's personal information[6].

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[5] The System shall provide a dialogue script to authenticate the contact based on predefined business rules (i.e. provide a dialogue script by contact type).

[6] The System shall ensure all incidents will be tied to a contact. If contact does not exist, provide SCRs with the ability to associate the incident to a dummy Contact record.

2.3.3 Role Types

Role types allow classification of contacts by their role. Using Contact Types enables the Service Center to report on contacts by their Contact Type. The table below details the contact types[7] identified by the Service Center:

Contact Type	Description / Purpose
Individual	Individual Consumer
Employee	SHOP Related – Employee of a registered Employer
Employer	SHOP Related Employer
Assister	Registered Assister
Agent	Registered Agent
Issuer	Qualified Health Plan Contact
Other	Any Contact type that does not fall into the defined categories (e.g. Media, Government and Partnerships)

Table 5: Contact Types

Note: Additional SHOP and Assister contact types may be added in the SHOP and Assister Delta Functional Designs.

2.3.4 Contact Workspace Fields

The following list represents the fields within the Contact workspace to capture information associated with the Contact. The solution conditionally captures information associated with the Contact for all of the Contact types associated with them[8,9,10,11,12] The following information is editable by the Service Center Representative[13,14]:

Name	Description	Type
Role Type	The role type associated with the Contact (see Table 5)	All
Email address	Primary email address of the contact	All
Last Name	Last name of the contact	All
First Name	First name of the login	All
Organization	Organization associated with the contact	NA for R1
Alternate Email 1	Alternate email address number 1 for the contact	All
Alternate Email 2	Alternate email address number 2 for the contact	All
Title	Contact's title	All

[7] The System shall identify/associate Contact by Contact type.
[8] The System shall track a Contact's contact preferences.
[9] The System shall conditionally capture information associated with the Contact for all of the Contact types associated with them.
[10] The System shall capture Contact status (i.e. Prospect, Lead, and Member).
[11] The System shall indicate "Do Not Contact" for customer.
[12] The System shall store basic demographic information such as DOB
[13] The System shall update demographic information directly in tool.
[14] The System shall view the relationships between different contacts including: a) Employee/Employer relationship b) Individual/Assister relationship (if it exists) c) Employer/Agent relationship (if it exists)

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Name	Description	Type
Address Line 1	Street address for the contact	All
Address Line 2	Street address for the contact	All
City	City associated with the contact's street address	All
State / Province	State associated with the contact's street address	All
Postal Code	Zip code associated with the contact's street address	All
Country	Country associated with the contact's street address	All
Office Phone	Contact's work telephone number	All
Mobile Phone	Contact's mobile telephone number	All
Fax	Contact's fax number	All
Home Phone (ANI)	Contact's home telephone number	All
Language Preference	Contact's Language Preference	All
Contact Type	Contact's Type	All
Preferred Method of Contact	Contact's Preferred Method of Contact	All
HPID	Contact's Health Plan ID	NA for R1
Agent ID	Contact's Agent ID	Agent
Status	Contact's Status (Prospect, Lead, Member)	Individual, Employee, Employer
Do Not Contact	Removes person from Service Center outbound contact	All
Date of Birth	Contact's Date of Birth	All
Assister	Contact's Certified Assister	Individual
Agent	Contact's Licensed Agent	Individual, Employee, Employer
Gender	Contact's Gender	All

Table 6: Contact Workspace Fields

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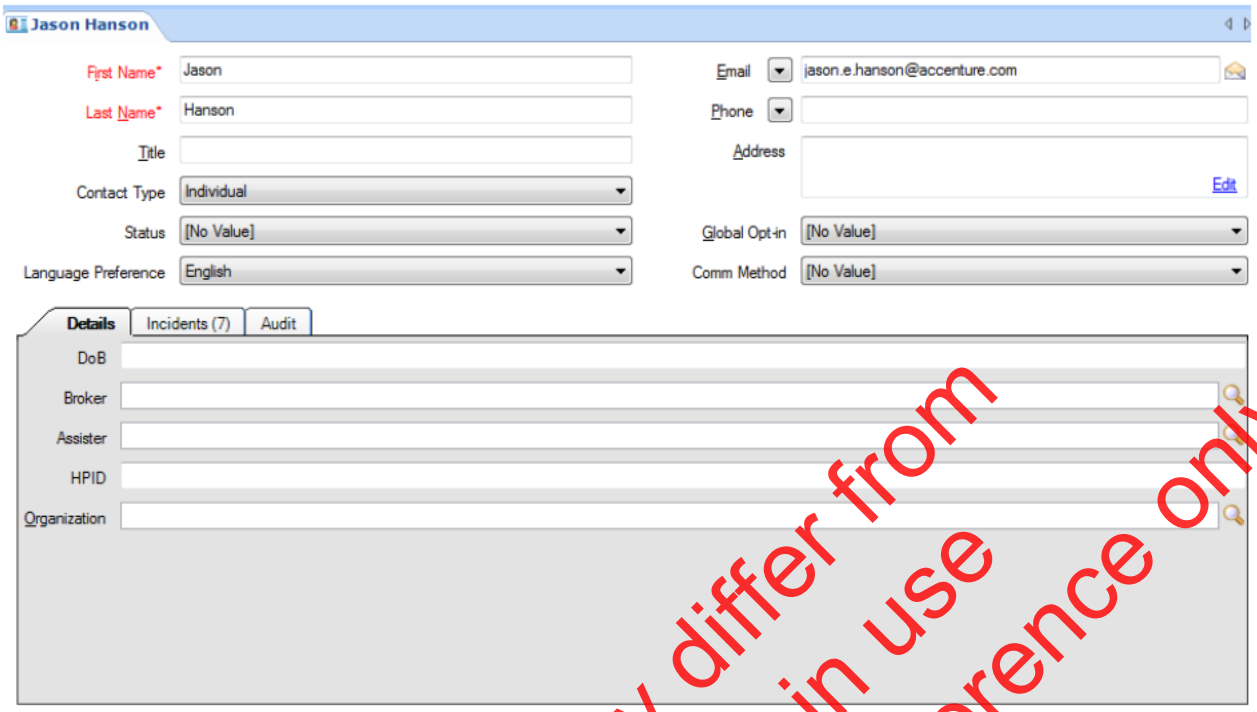

Figure 7: Contact Workspace

2.3.5 Contact Workspace Tabs

The Contact Workspace includes several tabs that allow staff users to view more detailed information associated with the Contact Record. The tabs included in the Contact Workspace are the Details Tab, Incidents Tab, and Audit Tab.

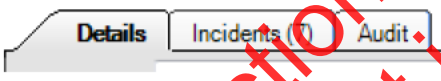

Figure 8: Contact Workspace Tabs

2.3.5.1 Details Tab

The Details Tab provides additional and more detailed field level information associated with the Contact as well as information regarding the Contact type associated with the Contact. For the Contact type, the Details tab contains the following information:

Field Name	Description
Begin Date	The begin date associated with the role type.
End Date	The end date associated with the role type.
Role	The name of the role type associated with the Contact.
Organization	The name of the Organization associated with the role type, if applicable.
Action	Actions that the staff user can take regarding the role type (Open and Delete)

Table 7: Details Tab Fields

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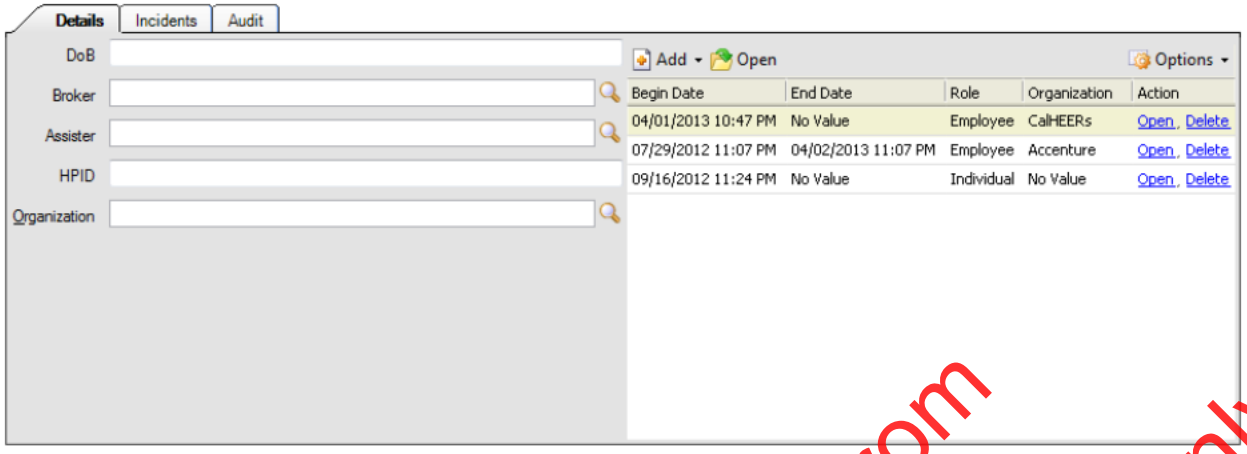

Figure 9: Details Tab

2.3.5.2 Incidents Tab

RightNow provides SCRs access to view the Contact's previous interactions with the Service Center. These interactions may be sorted by Type[15] or date[16]. Please reference the Customer Interaction Management FDD for details regarding Incident details and information stored at the Incident level.

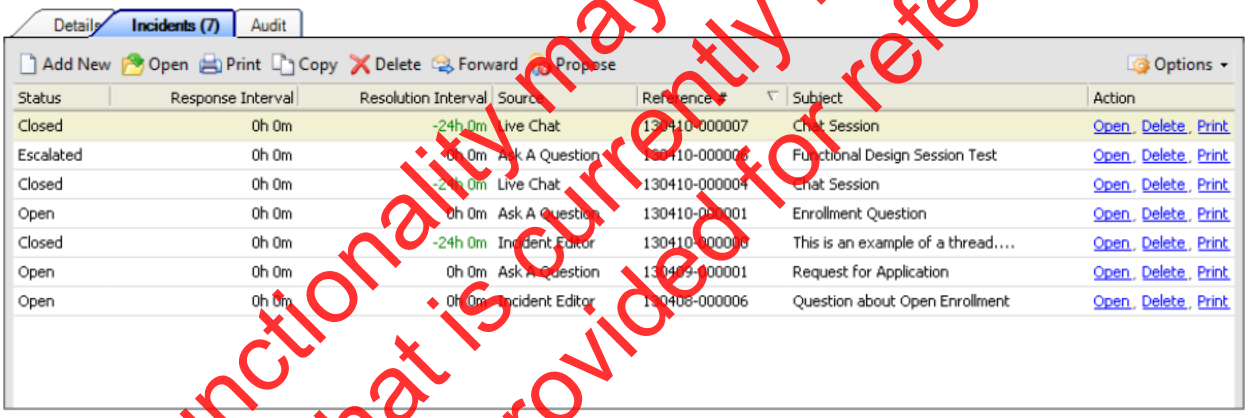

Figure 10: Incidents Tab

2.3.5.3 Audit Tab

The Contact Audit tab is displays any modifications associated with the Contact Record (creating a Contact Record is considered a modification) with the following fields:

Field Name	Description
When	The time and date that the Contact Record changed.
Who	The staff user that modified the Contact Record.

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[15] The System shall sort incidents associated with a Contact by defined classifications (e.g. the Contact type under which the interaction occurred, the subject of the incident).

[16] The System shall view incidents/interactions related to a Contact in chronological order and the date/time associated with the incident/interaction.

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Field Name	Description
What	A list of types of modifications that took place (Created, Edited, Deleted, Email Change)
Description	Fine grain details associated with the modifications made to the Contact Record in the "What" field.

Table 8: Audit Fields

Details | Incidents (7) | **Audit**

Options

When	Who	What	Description
04/15/2013 07:07 PM	Jack Whitehouse	Edited	From Contact Editor
04/15/2013 02:48 PM	Jack Whitehouse	Edited	From Contact Editor
04/15/2013 02:41 PM	Jack Whitehouse	Edited	From Contact Editor
04/10/2013 06:06 PM	Jack Whitehouse	Edited	From Incident Editor
04/09/2013 06:33 PM	Customer	Edited	From End-user Contact Update
04/09/2013 06:33 PM	Customer	Password Changed	Change Password Page
04/09/2013 06:33 PM	Customer	Edited	From End-user Contact Update
04/09/2013 06:31 PM	Customer	Email changed	Changed to jason.e.hanson@accenture.com
04/09/2013 06:31 PM	Customer	Created	From End-user

Figure 11: Audit Tab

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QUICK SORT CAPABILITY (SCR 19)

Version 1.0

Covered California Service Center
Functional Design Document

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VERSION CONTROL

Version	Change Description	Modified By	Date
V01	Template creation and Design draft	[redacted]	04/05/2013
V1.1	Document text and Visio (Figure 1, 4, 6)updated to reflect creation of secondary Tracer Record (not Tracer Incident) for use as Tracer ID (Build/Test). Usability feedback to Section 2.1- If #1 is No, do not collect customer information.	[redacted]	8/29/2013 – 8/30/2013
V1.2	Question 1 in Quick Sort Calculator updated per Executive Feedback	[redacted]	9/26/2013

ASSOCIATED DOCUMENTS

Document	Description	Location
Quick Sort Requirements	Quick Sort Plan and Analyze Requirements Document	Appendix
Interaction Management Functional Design	Interaction Management Functional Design document	SharePoint

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1.0 Overview

As a part of the Patient Protection and Affordable Care Act (Affordable Care Act) implementation, the State of California established the Covered California Service Center. The Covered California Service Center (Service Center) addresses customer inquiries regarding healthcare policy changes, insurance eligibility, as well as the application, processing and appeals of customer healthcare options. The Oracle RightNow Customer Relationship Management (CRM) solution is selected to track Service Center interactions, including customer inquiries (Service) and Marketing/Outreach Initiatives (Sales).

Capabilities in Release 2 include:

- Campaign Management*
- Contact Management & 360 Degree View
- Lead & Opportunity Management
- Customer Interaction Management
- Eligibility, Enrollment and Implementation
- Fulfillment Request Management
- Quick Sort (this document)
- Reporting

NOTE: *There are no additional Campaign Management requirements in Release 2.

Each capability applicable to Release 2 has a separate Functional Design Document.

Technical Interfaces in Release 2 include:

- I&AM / OAM Security
- Cisco Computer Telephony Integration (CTI)
- Pitney Bowes Fulfillment Processing
- CalHEERS
- CalHEERS Task List- Business Process Management (BPM)
- Quick Sort Rules Engine

1.1 Purpose

The purpose of this Functional Design Document is to:

- Address the design solution for each requirement and process flow provided by the Accenture Plan and Analyze team for CRM Release 2 (10/1 – 12/31) in the Requirements Document/Solution Blueprint and Quick Sort Requirements Blueprint (SCR 19)
- Provide a foundation for the Configuration Team to configure and build the RightNow Workspaces for Covered California Service Center

As a reference tool for configuration, this document serves as the basis for communication between the Client Service Center Team, Accenture Project Team, and the RightNow Application Owner, and its content should be comprehensive but easily understandable.

1.2 Terminology

The following terminology is used in this document:

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Acronym	Term	Description
ANI	Automatic Number Identification	The number from which the customer placed the call to the Service Center.
APTC	Advanced Premium Tax Credit	Tax credit for eligible Customers created by the Affordable Care Act
BPM	Business Process Management	The Oracle central repository for business processes and workflow management.
CRM	Customer Relationship Management	The tools and process of managing, tracking, and resolving customer Service interactions
FPL	Federal Poverty Level	Used to determine cut off points in Quick Sort calculation
MAGI	Modified Adjusted Gross Household Incoming	Used to determine cut off points in Quick Sort calculation
SAWS	Statewide Automated Welfare Systems	Made up of multiple systems supporting benefit determination, enrollment and case maintenance at the county level (C-IV; Los Angeles Eligibility Automated Determination, Evaluation, and Reporting System (LEADER); CalWIN)
SCR	Service Center Representative	The SCRs at the Service Center skilled to answer, work, and/or respond to customer inquiries.
UCM	Universal Content Management	The secure Oracle central repository for documentation.

Table 1: Functional Design Terminology

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1.3 Assumptions

The following assumptions apply to this functional design:

1. This Quick Sort Functional Design Document addresses requirements and designs applicable to Covered California Service Center implementation for Release 2 (October 1st- December 31st).
2. All Service Center Requirements documented in SCR 19- Quick Sort Pre-Qualify are met through this design document and the OPA Rules Engine.
3. For optimal visibility of the Oracle RightNow Workspace, assume all end users will have access to 21-inch monitors on their desktop, with minimum displayed settings set to a 1600 x 1200 resolution.

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1.4 Approval Process

Date	Deliverable	Owner
May 20, 2013	Draft of Quick Sort Functional Design due	Accenture Design Team
May 30, 2013	Document updated per meeting with Sejla Begic, Thien Lam, Harley Davis, Eric Pruss	Accenture Design Team
June 6, 2013	Confirmation of Quick Sort Business logic stored in OPA with: Sejla Begic, Harley Davis, Thien Lam, Juli Baker, James Gnesda, Jason Hanson, Dave Maxwell Jolly	Accenture Team
July 10, 2013	Quick Sort Functional Final Design Sign Off	Executive Review

Table 2: Quick Sort Approval Timeline

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1.5 Business Requirements

Contract Identifier	Description	Addressed by Section
Requirements pending Approval of CR 4787	Update the existing Anonymous Screening BRE OPA Rules for Quick Sort functionality	Quick Sort Pre-Qualify
Requirements pending Approval of CR 4787	Add new BRE OPA Rules for Quick Sort functionality with the ability to have two Quick Sort Outcomes	Quick Sort Pre-Qualify
Requirements pending Approval of CR 4787	Expose the Quick Sort rules as web service to CRM	Quick Sort Pre-Qualify
Requirements pending Approval of CR 4787	Add new form/page in Right Now with 7 Quick Sort Questions for Service Center Representatives (SCRs) to fill out with Consumer's answers	Quick Sort Pre-Qualify
Requirements pending Approval of CR 4787	Call CalHEERS Quick Sort BRE as web service, pass the answers to 7 questions, receive the results and to display to SCRs in CRM	Quick Sort Pre-Qualify
Requirements pending Approval of CR 4787	Develop the table with three SAWS Service Center phone numbers	Quick Sort Pre-Qualify
Requirements pending Approval of CR 4787	Look up the table with three SAWS Service Center phone numbers and transfer the call based on the county of residence	Quick Sort Pre-Qualify
Requirements pending Approval of CR 4787	Save the answers to 7 Quick Sort Questions and the outcomes	Quick Sort Pre-Qualify
Requirements pending Approval of CR 4787	Transfer the call to SAWS Service Center	Quick Sort Pre-Qualify

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2.0 Quick Sort Overview

The Quick Sort calculator is a set of questions used to determine if a Customer is eligible to receive coverage through one of the Covered California Exchange Health Plans, or must be transferred externally to SAWS. The CRM Oracle RightNow tool interacts with the Quick Sort

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Anonymous Screening rules through OPA (Oracle Policy Automation) Rules Engine for Customer eligibility determination[1].

The Quick Sort calculation process is initiated by Customer contact with the Service Center, and follows the following process:

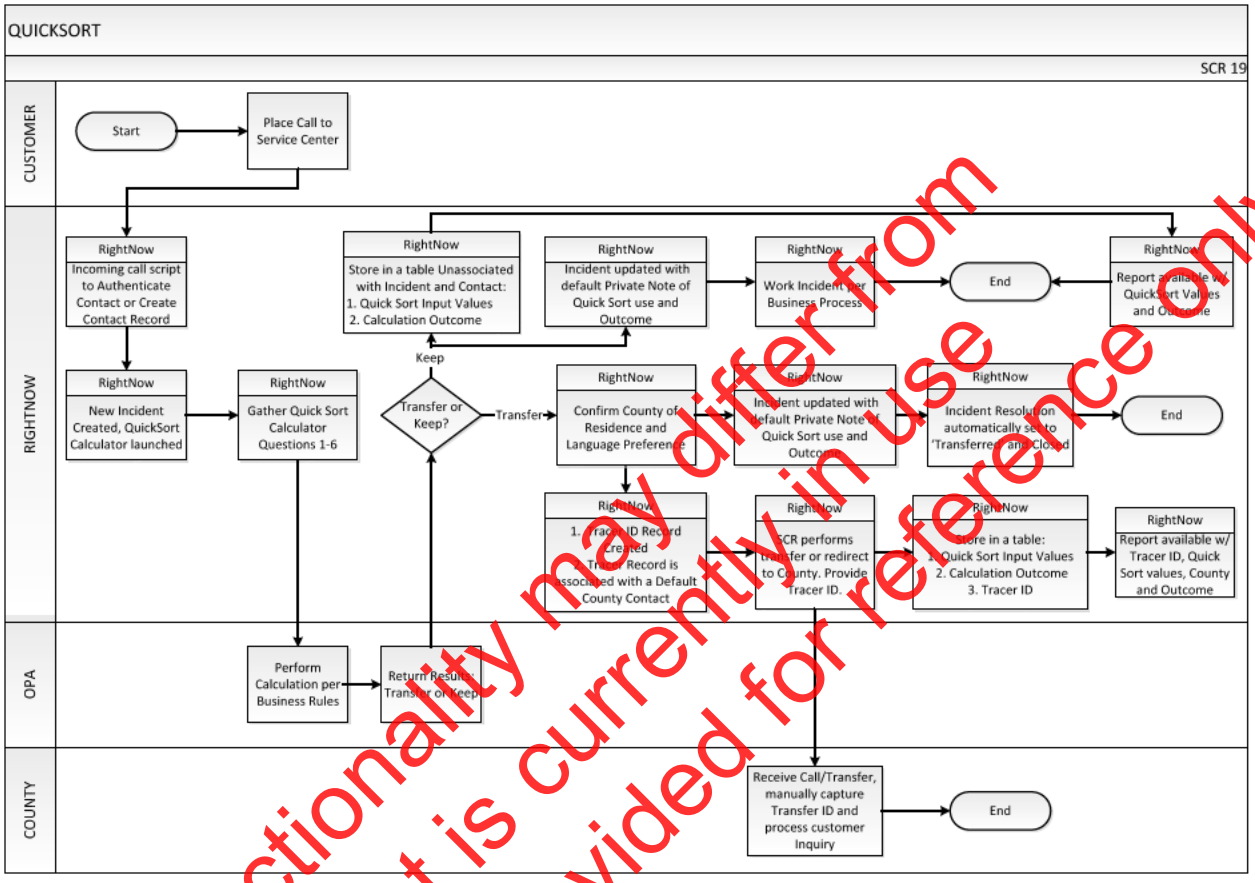

Figure 1: Quick Sort CRM Process Flow

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SCRs are able to access the Quick Sort Calculator Workflow using the "Quick Sort" button on the Oracle RightNow Ribbon.

[1] The System will align with Anonymous Screening rules via OPA (Oracle Policy Automation) for eligibility determination.

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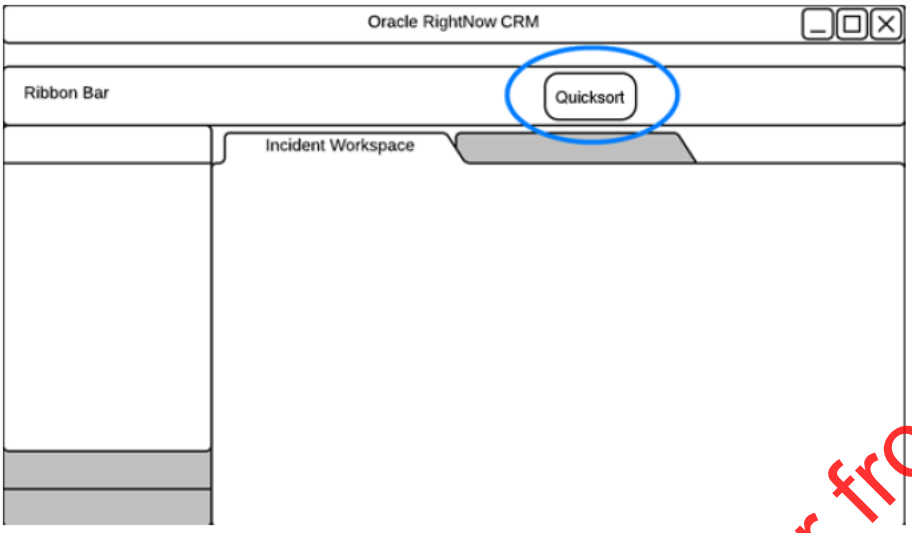

Figure 2: Quick Sort button in Workspace Ribbon

2.1 Quick Sort Questions

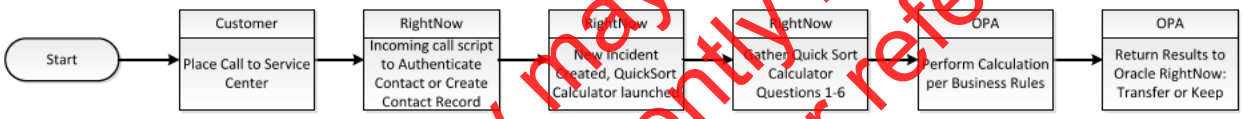

Figure 3: Submission of Quick Sort Answers to Rules Engine

An Oracle RightNow add-in supports a Quick Sort Calculator used to route Customers to the appropriate organization for their inquiry based on a series of question regarding APTC and FPL[2]. One QuickSort calculation should be run per Incident. The following questions are required for the Quick Sort calculator[3]:

Question	Format	Required?
Do you want to complete an application for coverage?	Menu: Yes/No	Yes
How many people are in your family?	Numeric	Yes
How many children are under the age of 19?	Numeric	Yes
Are any of your family members pregnant?	Menu: Yes/No	Yes
Are any of your family members elderly?	Menu: Yes/No	Yes
Are any of your family members disabled?	Menu: Yes/No	Yes

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[2] The System will build a Quick Sort calculator to quickly determine a customer's eligibility based on a series of question regarding APTC and FPL.
[3] The System will apply a set of business rules to determine eligibility.

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Question	Format	Required?
What is your annual income?	Numeric: Dollar	Yes

Table 3: Quick Sort Required Questions

The Quick Sort calculator does not allow the value of Question 3 (Number of Children under the Age of 19) to be greater than the value of Question 2 (Number of People in Your Family). Oracle RightNow will pass the SCR input to the Rules Engine, which stores the business rules necessary to determine if a Customer should be serviced by the Covered California Service Center or redirected to an external Consortium. If the Answer to Question 1(Do you want to complete an application for coverage?) is "No", all Quick Sort entries should be read-only, and no data is passed to the Rules Engine.

If the results of the Quick Sort calculation by the Rules Engine indicate a transfer is required outside of the Service Center, the SCR is prompted to ask the following additional questions prior to performing the transfer:

Question	Format	Required?
What is your County of Residence?	Text	Yes
What is your language preference?	Menu	Yes

Table 4: Quick Sort Transfer Questions

2.2 Quick Sort Incident Creation in CRM

Based on answers submitted the Rules Engine performs a calculation based on pre-determined business rules. The Rules Engine returns an answer to CRM identifying if the Customer is a Service Center Customer or if the Customer must be externally referred.

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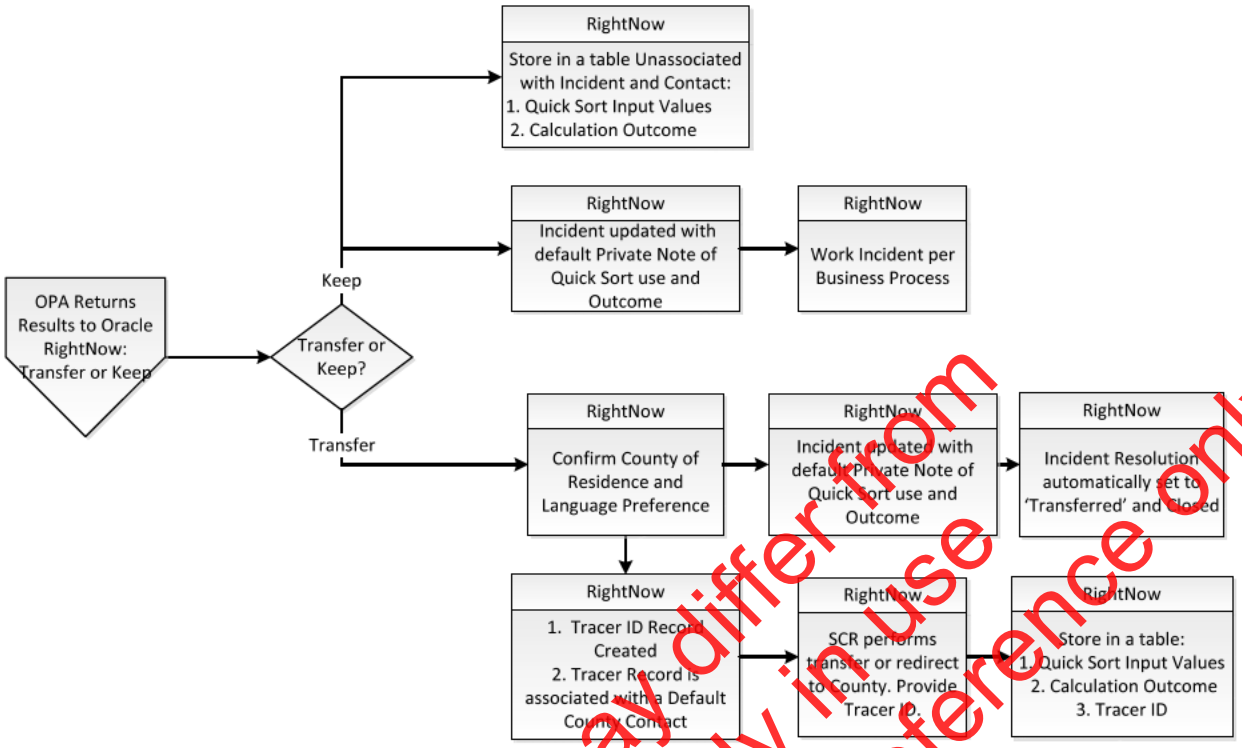

Figure 4: Quick Sort Incident Creation in CRM

2.2.1 Quick Sort Outcome: Redirect Not Required

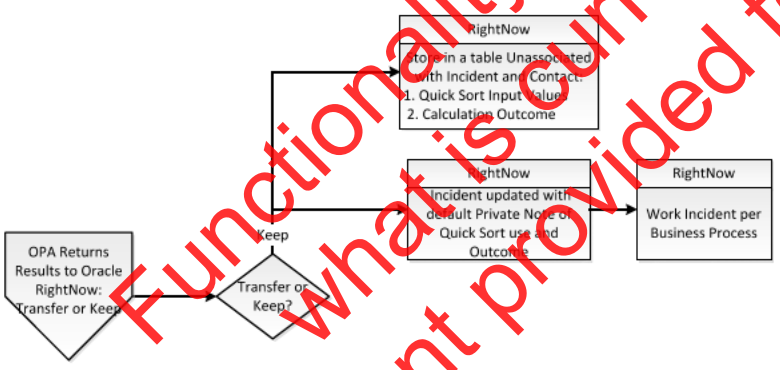

Figure 5: Quick Sort Calculation: Service Center Customer

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If the Rules Engine determines based on the Quick Sort calculation the SCR is able to process the Customer inquiry, the CRM Incident is updated with the following standard Private Note referencing Quick Sort use[4]:

"Use of Quick Sort calculator indicates the Customer Inquiry is processed by the Covered California Service Center".

The SCR will work the Incident per defined Business Process.

2.2.1.2 Storage of Quick Sort Data

Unassociated to the Contact and Incident Records, Oracle RightNow stores the information entered into the Quick Sort calculator and the Outcome of the Calculation in a separate table for reporting. Information stored in this table is available through a 'Quick Sort Data Report' to the Command Center and Administrative Profiles.

In addition, three custom fields are automatically created on the Details Tab of the Incident when the Quick Sort Calculator is run to support Reporting on the Outcome of Incidents kept by the Service Center. This 'Quick Sort Incident Report' is available to the Manager profile and above. The fields will be read only, and will automatically populate to the following information based on the most recent Rules Engine results:

Field	Values (Read Only)
Quick Sort Used?	Yes
Outcome	One of the following options, per Quick Sort outcome: 1. Covered California Service Center 2. External Referral
Date of Quick Sort	<Insert Last Quick Sort Date>

Table 5: Quick Sort on Details Tab

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[4] The System should not store Quick Sort data. Record of Quick Sort use and Quick Sort outcome will be noted in CRM Incident.

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2.2.2 Quick Sort Outcome: External Referral Required

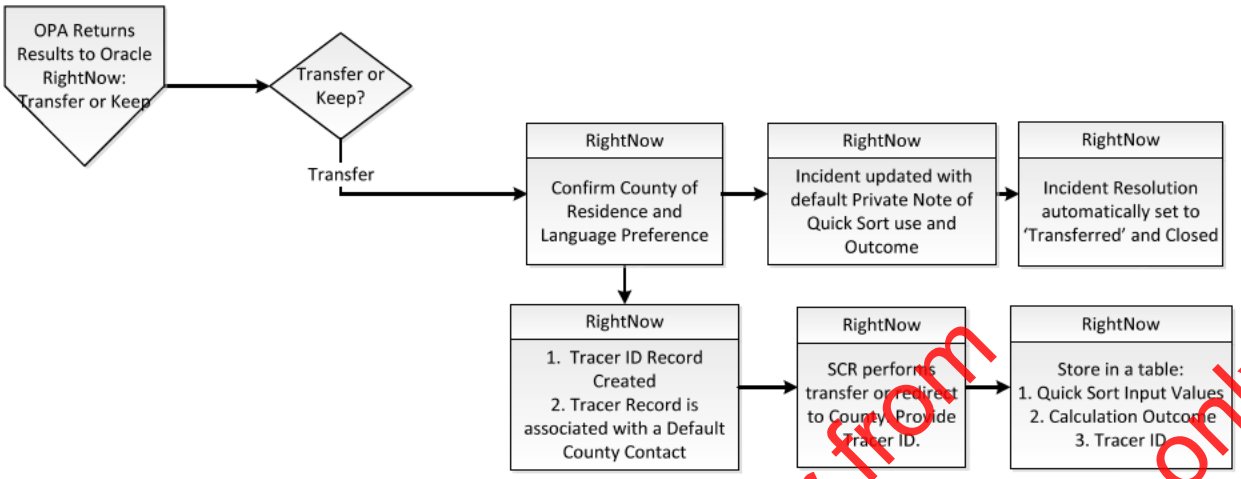

Figure 6: Quick Sort Calculation- External Referral

If the Rules Engine determines based on the Quick Sort calculation the SCR is unable to process the Customer inquiry, the SCR is prompted to identify the Customer's County of Residence and to confirm Language Preference.

Original CRM Incident. The initial Incident associated with the Contact is updated with the following standard Private Note referencing Quick Sort use:

"Use of Quick Sort calculator indicates the Customer Inquiry is not processed by the Covered California Service Center."

The initial Incident Resolution is automatically set to 'Quick Sort Result- External Referral' and Closed.

CRM Tracer Record. A CRM Tracer Record is automatically created, the Identification Number of which will be used as the Tracer ID. The Tracer ID is associated with a County Contact. The Tracer ID is not associated to the Customer's Contact Record or their original Quick Sort Incident Record in CRM. The SCR is presented with the Tracer ID for input during the external Transfer to County.

2.2.2.1 Customer External Transfer by SCR

If the Quick Sort Calculator indicates the Customer should be externally referred, the customer is transferred based on their County of Residence[5]. Customers are transferred to one of the following SAWS Consortia Network based on County of Residence and Language:

- CalWIN Consortium Customer Service Center Network
- Los Angeles Service Center Network
- C-IV Consortium Customer Service Center Network

[5] The System will have a source table with counties and county phone numbers for routing the customer in case they need to be transferred to a Medical Specialist.

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Based on the Language and County of Residence identified by the Customer, the Oracle RightNow add-in will display to the SCR the County Code and County Phone Number. To perform the transfer, the SCR puts the Customer on-hold and initiates an outbound call to the County of Residence (phone number is available in Quick Dial List of Softphone). The County IVR/Phone System prompts the SCR for County Code, Language Code, and the Tracer ID. The SCR will manually input the information, and the call is routed to the county worker.

If a redirect is required due to no available agents or if the Customer wishes to place the call at a later time, the SCR will provide the Customer the Tracer ID number, and instruct the Customer to provide the number to the agent.

2.2.2.2 Storage of Quick Sort Data

Oracle RightNow stores the Tracer ID, information entered into the Quick Sort calculator, and the Outcome of the Calculation in a separate table for reporting. Information stored in this table is available through a 'Quick Sort Data Report' to the Command Center and Administrative Profiles.

The Custom Fields with record of Quick Sort use, Date, and Outcome listed in Table 5 will be added to the initial CRM Incident. These values, in addition to the Incident Number and Disposition, are included in the 'Quick Sort Incident Report' noted in Section 2.2.1.2 above.

2.3 Quick Sort Management and Updates

The OPA Rules Engine stores the set of roles and profiles allowed to update the Quick Sort outcomes. These updates occur on an ad-hoc basis. When a rule or question is updated in the Rules Engine, a CRM administrator must be manually notified to update the applicable Private Note templates or Calculator values. Oracle RightNow stores the 'Quick Sort Data Report' and 'Quick Sort Incident Report', as defined in this document. A continuous review of referral metrics will be held by Service Center management to determine the need for Quicksort cut off point adjustments.

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3.0 Design Issues

ID	Description	Design Section	Date Due	Status
1	List of Counties, County Codes, Language Codes and corresponding phone numbers must be loaded into CRM and Softphone Quick Dial	2.2.2.1	7/19/13	
2	In the Transfer scenario (Tracer ID) is the Voice Recording available (and Contact Information)?	N/A		

Table 6: Open Design Items Table

4.0 Appendix

4.1 Quick Sort Calculator Sample

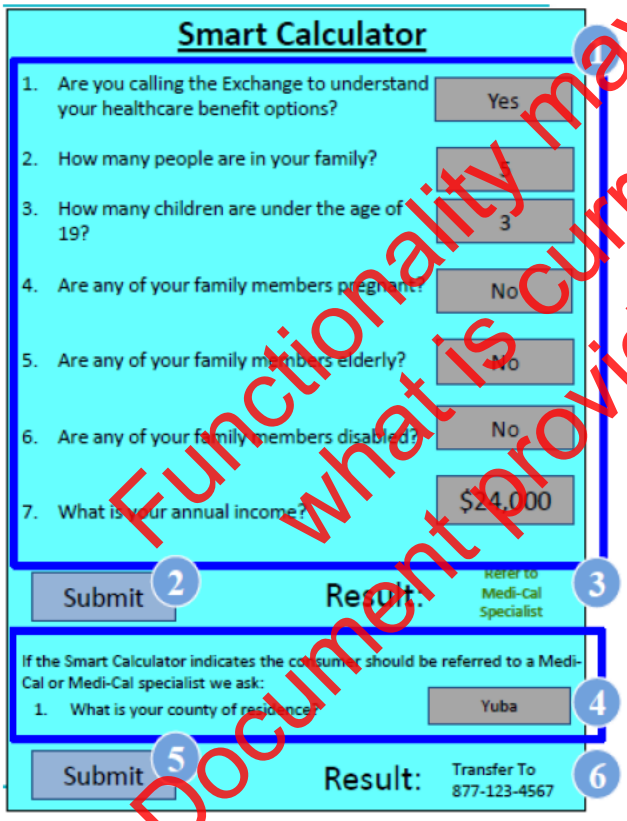

Figure 7: Sample Quick Sort Calculator

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