The enclosed documents are for reference only – Covered California has redacted any information that it has deemed is not relevant to the project and may have potential security concerns.

The processes, screens, and business rules shown may have changed since the documents were created, they should be used for refence only.

CRM Runbook

Covered CA IT CRM Project Team
Version 3.0 – Updated: 4/3/2018

Revision History

Date	Document Version	Revision Description	Author
5/31/2016	V2.0	Initial Draft	Sondel
8/12/2016	V2.0	Draft Revisions	Sondel
9/9/2016	V2.1	SSL renewal details	Sondel
12/28/2016	V2.2	CalHEERs Test Server Details	Sondel
1/19/2017	V2.3	Added Config Asst details	Sondel
2/28/2017	V2.4	Added CXDev Toolbox section	Sondel/Renee
9/20/2017	V2.5	Removed CXDev Toolbox, added Bulk Loader	Sondel
10/26/2017	V2.6	Added more troubleshooting samples	Sondel
12/8/2017	V2.7	Added Holiday Config & Bulk loader details	Sondel
12/20/2017	V2.8	Added QS Phone Number maintenance	Sondel
12/29/2017	V2.9	Added Clone/Refresh steps	Sondel
4/3/2018	V3.0	Content Updates	Sondel

Current Runbook document location:

[redacted]

[redacted]

[redacted]

Table of Contents

Revision History i
Current Version: May 2017 SP3 1
1.0 Overview of CRM Runbook 1
2.0 Assumptions and Constraints 1
Assumptions 1
Constraints 1
3.0 Environments 2
Desktop Agent Console 2
Browser User Interface 2
Customer Portal 3
4.0 Site Management 3
Console Install URLs 3
Oracle Service Cloud Technical Support 4
Service Cloud (Support) Contact Management 4
Virtual CIO 5
Configuration Assistant 5
Configuration Assistant Help Guide Table of Contents 5
Contextual Help Menu 6
Submitting Incidents to Oracle Service Cloud Customer Care (aka Service Requests) 6
Client Success Specialist 6
Technical Account Manager (TAM) 6
Clone/Site Refresh 7
Steps to Request a Clone for DEV or TST sites (aka Refresh) 7
Sparse Clone vs Full Clone 8
Make Safe Process (auto completed by Oracle) 8
Post Clone Actions (completed by CRM Admins) 8
5.0 Troubleshooting 9
5.1 System Troubleshooting 9
Oracle Service Cloud Administrator tutorials 9
Oracle Service Cloud Knowledgebase 9
Oracle Service Cloud Community Support 9
5.2 General User Troubleshooting 9

Password Reset – Login Help 9
Rebuild Local Data Cache 11
Safe Mode login - Disabling Extensions 12
Server Communication Errors 12
Login Error Message - Experiencing Technical Difficulties 13
CRM (Finesse) Pop-up not working 14
Troubleshooting Tools 15
Error Logs 15
6.0 Configuration 18
6.1 Welcome/Login Messaging 18
6.2 CRM Communications Window 19
6.3 IP Security Blocking 20
6.4 Chat Hours & Holidays 22
6.4.1 Hours Configuration 22
6.4.2 Holiday Configuration 23
6.5 Profiles – Staff Accounts 24
6.6 Groups – Staff Accounts 25
6.7 Queues 26
6.8 Workspaces 27
6.9 Navigation Sets 27
6.10 Email Integration 27
6.10.1 Email SPAM Management 28
6.11 Message Bases 29
Chat Launch 29
Chat Role (Product) 30
7.0 Incident Management 31
Email 31
Mail/Fax 31
Chat 31
8.0 Scripting 31
9.0 Standard Text 31
10.0 Add-in Manager 32
10.1 Closed Incident Lock 32

10.2 Common 33
10.2.1 SSL Certificates 34
10.3 CTI Simulator 35
10.3.1 CTI Simulator Sample: 35
10.4 CTI Status 37
10.5 Quick Sort 38
10.5.1 Updating County Phone Number for QuickSort Display 39
10.5.2 QuickSort Testing Notes 39
11.0 Importing Data 40
12.0 User Account Bulk Importing/Updating 40
13.0 Knowledgebase 41
13.1 Sibling Articles Workaround 41
14.0 Customer Portal 42
14.1 Dreamweaver settings: 42
14.2 Deploy to Stage 43
14.3 Promote to Production 48
15.0 Spanish Chat Interface 55
16 Appendix 58
Original CalHEERs CRM Project Documentation 58
Original CalHEERs CRM Project Documentation (Con't) 58
Documentation of Archived Functions 59
Business and/or Solution Design Documents Covered CA IT CRM Internal Documents 60
Service Cloud Configuration Assistant- Screen Samples: 61

Introduction to the Covered California CRM

The Customer Relationship Management (CRM) system provides:

- Service Centers the ability to track/log/transfer/escalate customer inquiries,
- Searchable Knowledgebase for Service Center Representatives to accurately address customer issues,
- Capture and store customer information for support, marketing, and/or outreach purposes

Current Version: May 2017 SP3

Documentation Overview: https://cx.rightnow.com/app/answers/detail/a_id/9486

User Guide URL:
https://documentation.custhelp.com/euf/assets/docs/may2017/olh/index_frames.html

Video Tutorials:
https://docs.oracle.com/cloud/may2017/servicecs_gs/servicecs_videos.htm

1.0 Overview of CRM Runbook

The CRM Runbook is written for the I.T. System Administrator(s) responsible for maintaining Covered California's Oracle Service Cloud solution. It is meant to be a "road map" to establish a basic understanding of the custom configuration/settings/development and to guide those System Administrator(s) in maintenance and troubleshooting activities.

2.0 Assumptions and Constraints

Assumptions

The following are key assumptions relating to CRM:

- Oracle is responsible for hosting Oracle Service Cloud sites and data, and providing fixes and clones per the request of the System Administrator.
- Covered California staff creates, imports and manages all data stored in the Oracle Service Cloud solution.

Constraints

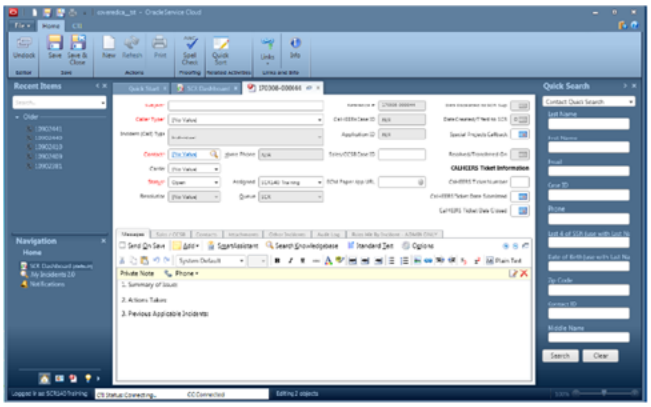
The CRM solution is a cloud based platform, internet access is required. Secured by approved IPv4 and IPv6 addresses.

3.0 Environments

Desktop Agent Console

Figure 1 – Agent Console Login

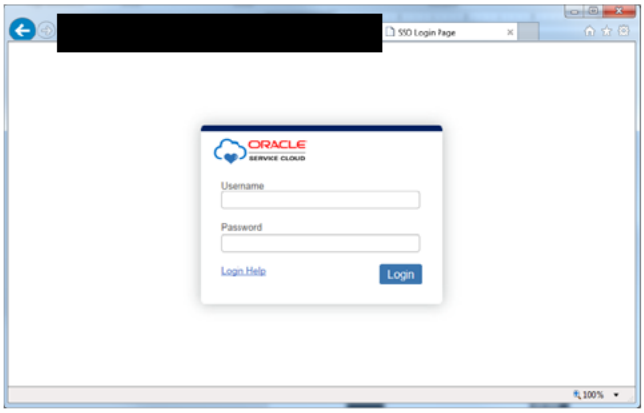
Figure 2 – Agent Desktop



Browser User Interface

Figure 2 – Agent Web

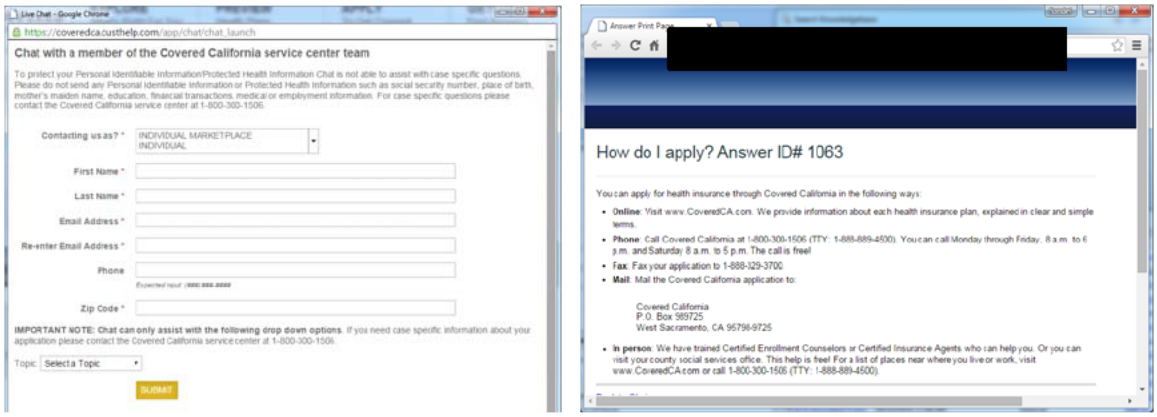
[redacted]



Customer Portal

The Custom Portal (Chat and Knowledgebase articles) runs on the browser platform.

Figure x – Chat Start Window and Knowledgebase Article Sample



4.0 Site Management

The Covered California CRM implementation is integrated to provide Knowledgebase solutions and customer relationship solutions. Technical Support for this service can be found through Oracle's Support and Community website.

Site Name: coveredca

Interfaces:

- coveredca (en-US)
- coveredca-esp
  - Specifically used for the Customer Portal Spanish chat public interface
- coveredca--tst
  - CCU Training environment
- Coveredca--dev
  - CoveredCA IT CRM Admin team development and test area

Version: [redacted]

- [redacted]
- [redacted]

Console Install URLs

- [redacted]
- [redacted]
- [redacted]

- [redacted]

Oracle Service Cloud Technical Support

Oracle Service Cloud maintains a technical support portal for managing Oracle Service Cloud CX site. The support portal contains an extensive product Knowledgebase, an interface for interacting with Oracle Customer Care, and other useful tools.

Support Portal Location: https://cx.rightnow.com

Gaining Access:

A user must have an account created on https://cx.rightnow.com by an Organization Administrator for the "coveredca" site. The administrator will create a "Contact" record and grant the appropriate permissions to a CRM Administrator's account.

Additional Detail:

- Details on using the Contact Management page to add or update designated contacts: https://cx.rightnow.com/app/answers/detail/a_id/1560
- Contacts can be created with one of 3 different permission types:
  - Community Access – A contact with this access can search the knowledge base articles and access Community forums.
  - Support Contact – A contact with this access has all of the Community Access as well as the ability to submit service requests to Oracle.
  - Manage Contacts – A contact with this access has the abilities of Community and Support contacts as well as the ability to create and modify contacts for their organization.

Service Cloud (Support) Contact Management

Contact Management allows an organization to manage its contacts, including the ability to add new contacts, change privileges of existing contacts, and disable contacts. Through these privileges, the organization can control who may access the Oracle Service Cloud Customer Community pages, access and submit service requests to the Oracle Service Cloud technical support site, and manage other contacts.

To access Contact Management: (https://cx.rightnow.com/app/answers/detail/a_id/1560)

1. Log into the support page at http://cx.rightnow.com.
2. Click on the My Account link on the top right side of the page.
3. Click the link for Contact Management under the Profile heading (NOTE: This link is only displayed for users with access to Manage Contact privileges. If you do not see this link, please contact the Oracle Service Cloud administrator.)
4. Click Add a New Contact

Once the new contact has been added, they will receive an email welcoming them to the Oracle Service Cloud Customer Community. Within the email, they will be given their User ID as well as instructions on how to reset their password.

IMPORTANT: To change the Primary Support Contact, refer to Answer ID 6309
https://cx.rightnow.com/app/answers/detail/a_id/6309/related/1

Virtual CIO

[Deprecated – now use Configuration Assistant]

Virtual CIO (VCIO) is an online dashboard for monitoring the performance and health of the Oracle Service Cloud service. Dashboard Location: https://csp.rightnow.com/vcio

Configuration Assistant

[redacted]

The Configuration Assistant home page for Oracle Service Cloud displays the following.

- Number of Service, Oracle Policy Automation (OPA) and Test sites, interfaces, and mailboxes purchased by your organization.
- List of sites and shows information about each site, such as:
  - Upgrade type
  - Site type
  - Product version the site uses
  - Number of interfaces
  - Creation date
  - Site subscription ID
  - Number of mailboxes
  - Number of test sites

Configuration Assistant Help Guide Table of Contents

Live links to online guide.

- Creating a Site
- Managing Test Sites for Oracle Service
  - A test site is a clone of your production site, and can take several hours to several days to create.
- Managing Test Sites for Oracle Policy Automation
- Resetting the System Administrator Password
  - Oracle Service Cloud site has a system-defined administrator account, known as the System Administrator. By default, the System Administrator is granted the highest level of permissions available that includes all possible permissions. The System Administrator is the "administrator" login. An email containing the new password will be sent to your email address.
- Managing Interfaces
- Managing Mailboxes
- Enabling Oracle Cloud Integrations and Oracle Service Cloud Product Add-Ons
- Managing SSL Certificates

- Monitoring Data and Usage Statistics

Contextual Help Menu

The Agent Console has a contextual help feature for nearly every aspect of the product. This help documentation can be accessed by clicking the icon in the top right corner of the console. Documentation for the current Workspace will open in a web browser.

Submitting Incidents to Oracle Service Cloud Customer Care (aka Service Requests)

The CoveredCA Oracle Service Cloud site contract comes with a customer support package from Oracle. When you contact Oracle Service Cloud Customer Care, an Incident is created in the Technical Support site and an Incident Reference Number is provided. Any further communication with Oracle Service Cloud Customer Care involving your issue or request, regardless of channel, should include the reference number. This will help Oracle track the request and provide faster resolution.

Oracle Customer Care may be contacted for appropriate inquiries and requests through:

- [redacted]
- [redacted]

All Oracle Service Cloud Customer Care Incidents for CoveredCA are visible from the Technical Support portal (cx.rightnow.com). Through the web portal you can review Incident history, reopen Incidents, close Incidents or provide additional information through a web form.

Client Success Specialist

[redacted]

The Client Success Manager (CSM) is an Oracle representative, employed in the Oracle Sales organization, who is a consistent point of contact at Oracle for certain types of issues.

Certain issues may be brought up to the Client Success Manager when no other path for resolution is available. The CSM will establish and maintain a relationship with someone on the project at an executive level. Any communication to the CSM should come through that executive. In general, only strategic type problems should go to the CSM, and day to day operational issues should only be shared with the CSM if the problem becomes chronic or is not resolved in a timely manner. The Oracle Support Contract between Covered California and Oracle may be referenced for details on the agreement.

Technical Account Manager (TAM)

[redacted]

The Technical Account Manager is to maximize client retention and success. TAM will be a trusted technical advisor to rely on to provide best practice and knowledge on Oracle Cloud Services.

Clone/Site Refresh

With the Oracle Service Cloud CX solution, sites can easily be copied and made available at an alternate URL. The process of making a copy of a site is referred to as "Cloning". A clone will contain an exact copy of configuration, data, and code based resources. Typically, a clone is made from the "Production" site, but clones may also be made from other clones on a case-by-case basis via the TAM.

Steps to Request a Clone for DEV or TST sites (aka Refresh)

1. **Log into the OSC Configuration Assistant**
   URL: https://ossc-fg.custhelp.com/hmsadf/login.jsp
   [redacted]
2. **Click the expandable menu for the site you want refreshed** *(Figure 1)*
3. **Select "Re-Create Test Site"** *(Figure 2)*
4. **Schedule, leave blank for request to start immediately or schedule for future time/date** *(Figure 3)*

Figure 1

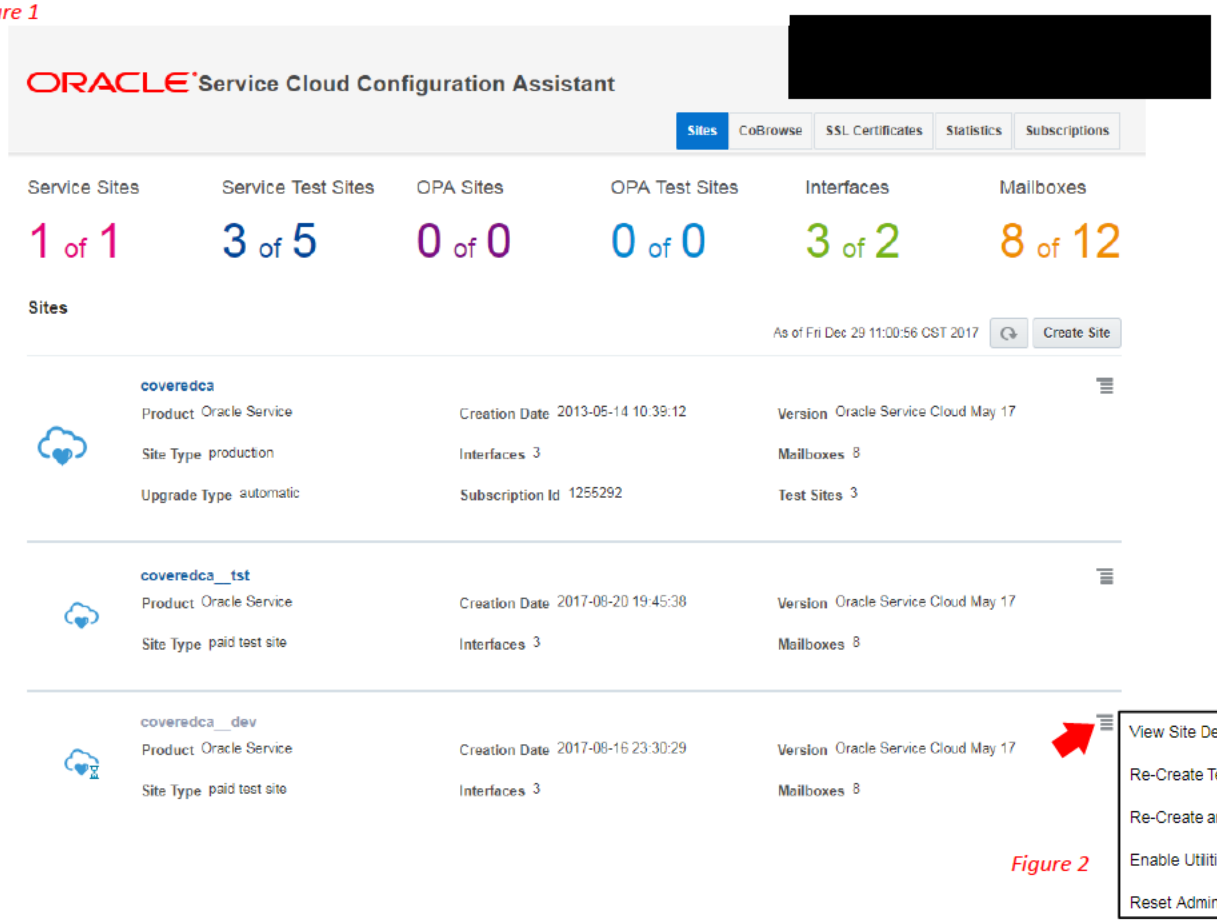
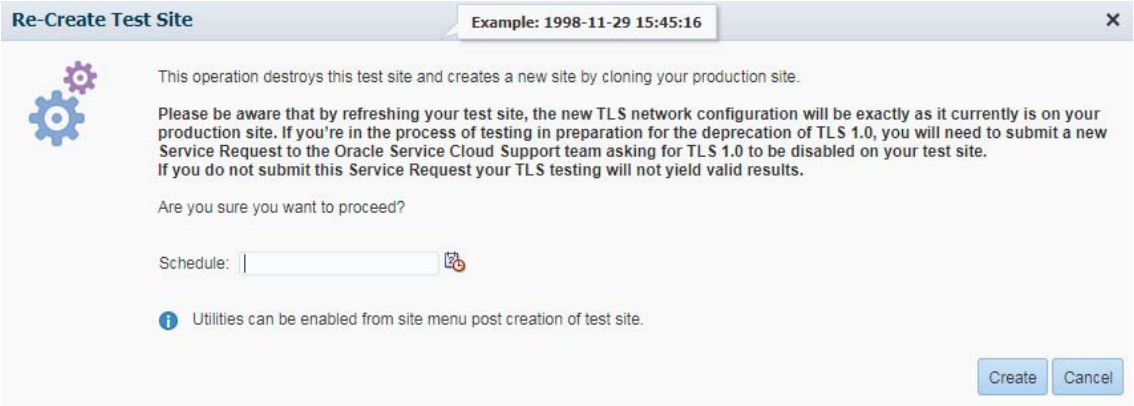


Figure 2

Figure 3



Sparse Clone vs Full Clone

There are two types of clones. A "Sparse Clone" is the standard type of clone and is much quicker to complete. This type of clone brings over a subset of information from the production database limited to the last 10,000 (estimate) incidents and their associated contacts.

The other type of clone is a "Full Clone" and it represents a full copy of the production database. This type of clone can be time consuming to complete and uses far more resources. Unless the full database is needed, you should choose the 'Sparse Clone' option.

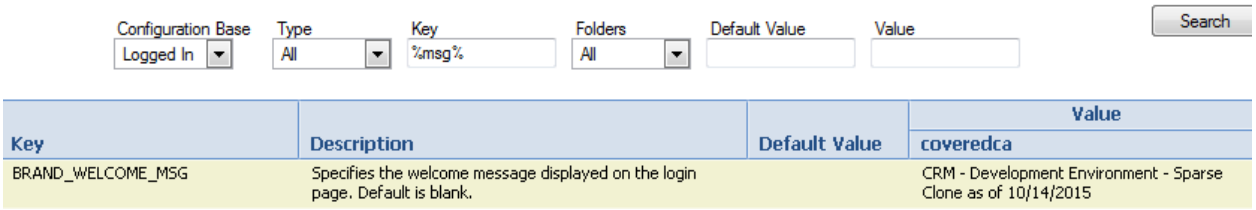
Make Safe Process (auto completed by Oracle)

Every clone goes through a process referred to by Oracle as "Make Safe". The primary action of this process is to append ".invalid" to the end of every email address of a Contact Record (primary, alt1, alt2). This action prevents emails from being unintentionally delivered to actual contacts from the clone system.

Post Clone Actions (completed by CRM Admins)

The following configuration changes:

- Update Welcome/Login message to display clone type and date
  Configuration > Site Configuration > Configuration Settings
  Search Key: **%msg%**



- If training environment has been refreshed/cloned…
  Then: Make sure to re-import all training accounts. Training account template file can be found on CRM Internal SharePoint site. (*Test accounts for Training Env.csv*)

- Email in non-production environment:
  Enable techmail (the utility that processes incoming email into incidents) and/or enable a mailbox for testing purposes.

  Refer to Answer ID 8970:
  https://cx.rightnow.com/app/answers/detail/a_id/8970/track/AvNa0QpSDv8S~fEHGsJy~6L0Z3cq8y75Mv8Y~zj~PP~R

5.0 Troubleshooting

5.1 System Troubleshooting

Oracle Service Cloud Administrator tutorials

- https://cx.rightnow.com/app/answers/detail/a_id/8430/kw/script%20Tutorials

Oracle Service Cloud Knowledgebase

- https://cx.rightnow.com/app/answers/list

Oracle Service Cloud Community Support http://communities.rightnow.com/search

5.2 General User Troubleshooting

Password Reset – Login Help

Users with an active covered.ca.gov email address can complete the "Self-Service password reset".

1. From the CRM login page, click the "Login Help" link (see figure 5.2-1)
2. Select "I forgot my password" and enter email address (see figure 2)
3. Almost immediately an email will be sent from "Covered California (coveredca@mailps.custhelp.com)" with the Subject of "Support Account Assistance"
   Click the "Reset My Password" link (see figure 3)

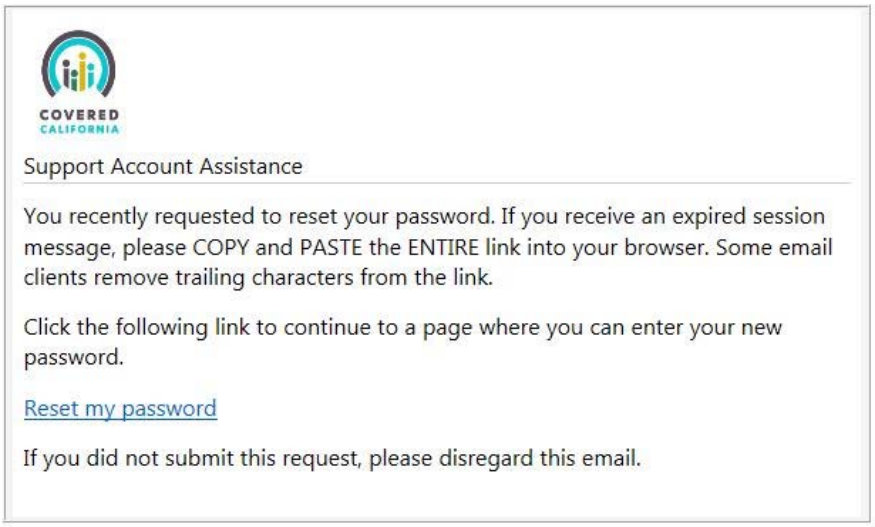
4. Enter and Confirm new password. (see figure 4)
5. Return to CRM login page, enter new credentials.

Surge (Faneuil/Maximus/etc) personnel may not have emails that can receive the "Self-Service password reset". These users may need to contact the Covered CA IT Help Desk at 916-228-8888 to reset their passwords.

[Figure 5.2-1]

[Figure 2]

[Figure 3]



[Figure 4]

Rebuild Local Data Cache

Clearing RightNow cache is a simple way to fix many of the minor errors you may encounter while working in the agent/administration console.

Local cache files store all option list data (any data accessed from a drop-down menu or menu list) plus additional data such as report and workspace definitions, questions, documents, and standard text. If you aren't sure whether your local copy of common data matches the data on the server, rebuild your local cache to retrieve the most up-to-date version.

Steps to rebuild local cache:

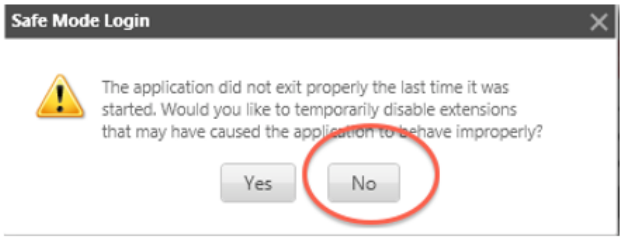
1. *Main Menu > File > Options > Personal Settings*
2. Select the "Rebuild Local Data Cache" check box under Local Data near the bottom of the window. (see figure B below)
3. Click the OK button to save all changes made to your personal settings. A prompt asks you to confirm your request to rebuild your local cache.
4. Click the Yes button to begin the data retrieval process. A progress bar will displays on the content pane.

5. Once all data is received from the server and rewritten to the cache, the progress bar closes as does the Oracle RightNow CX Cloud Service Options window.

Safe Mode login - Disabling Extensions

Another commonly encountered error occurs when the Agent Console does not exit properly. The next time a Service Center Representative (SCR) logs into the system, they may be prompted to start the application in "Safe Mode." This could occur if the Console had previously crashed, or if the SCR's computer was restarted without closing the Agent Console.

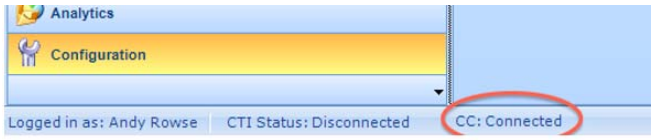
Figure 5 – Safe Mode Pop-up



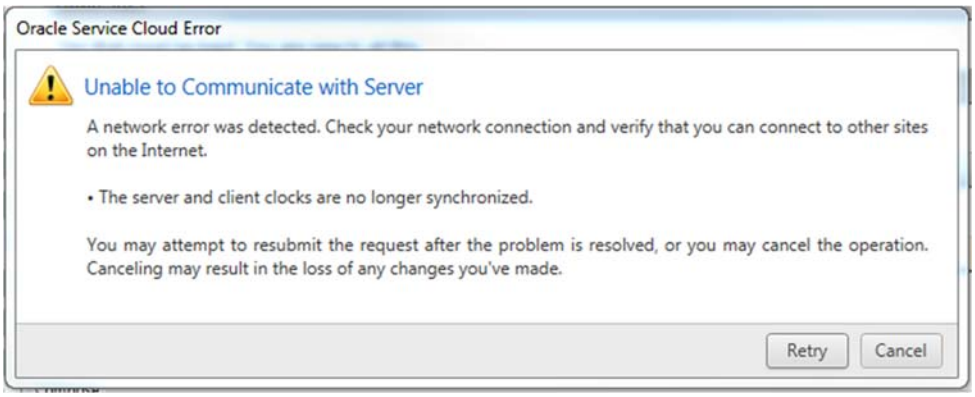
In all cases, the SCR should be instructed to select "No". If the SCR were to select "Yes," critical custom components (AddIns) would be disabled. Since nearly all system functionality depends on these AddIns, the system will not behave as expected.

The console is open in "Safe Mode" if the words "CC: Connected" do not appear in the status bar (see figure 6). This label is generated by the "CC_Common.zip" AddIn which is activated for all Profiles. If AddIns are disabled (due to Safe Mode), the label will not appear.

Figure 6 – CC: Connected



Server Communication Errors



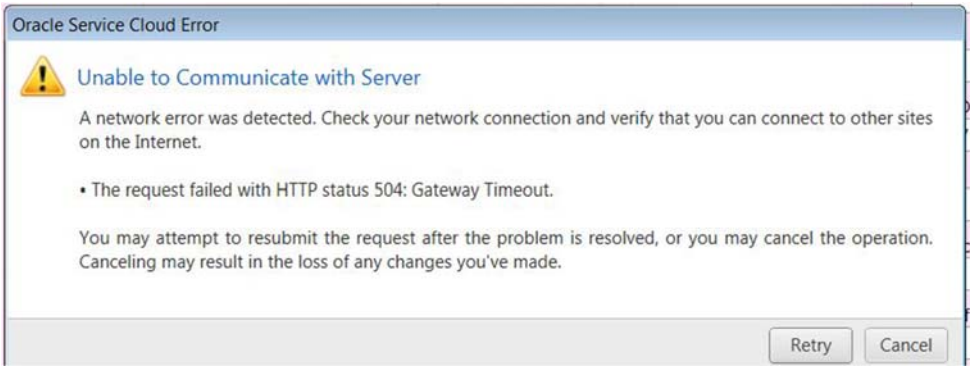
Message: The server and client clocks are no longer synchronized

Solution: (per Zaid)

1. Disabled both the NTP GPOs which set time in the PDC Emulator and the other Domain Controllers

2. Shutdown Accenture Legacy 2008 Domain Controllers.
    a. We found the legacy servers to be unable to keep a stable clock and continually reverting back to “local cmos” controlled clocks which ultimately were always 2 minutes behind.
    b. Only one (1) of two (2) vmware hosts supporting these two windows 2008 domain controllers showed the ability to set the time properly.
3. DHCP scopes were verified to make sure neither of the two legacy domain controllers was specified as DNS Servers

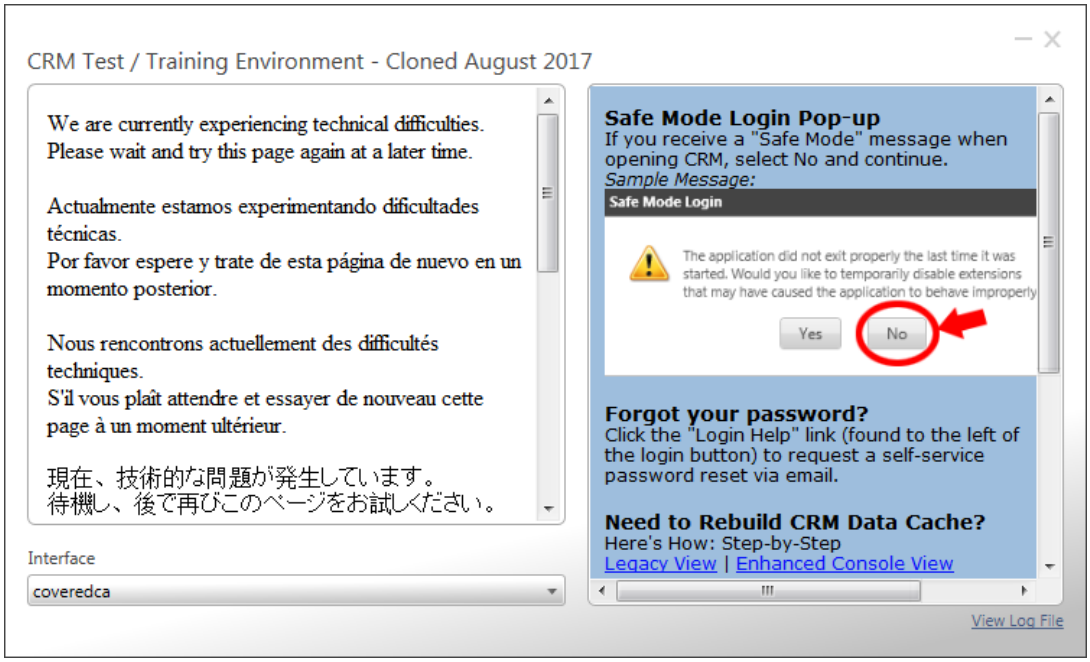
(per Ian) The server communication issue was caused when the network team was trying to sync the NWN and CCSCR networks. It caused an unintended change on the time setting for the PC’s and this resulted in the stoppage of communications with the server.



Message: The request failed with HTTP status 504: Gateway Timeout

Solution: Had to contact Oracle Support, was an issue with the POD that they had to resolve on their end.

Login Error Message - Experiencing Technical Difficulties



Solution: Had to contact Oracle Support, was an issue with the POD that they had to resolve on their end.

CRM (Finesse) Pop-up not working

At this point has only been an issue at the Fresno Service Center

Help Desk Ticket:

Incident Information

Affected User

[redacted]

Alternate Contact Method

[redacted]

Created By

[redacted]

Location

[redacted]

Title (Required)

Pop up on CRM is not work on incoming calls

Description

Pop up not working on incoming call
on every call coming in
SCR has to open his own incident/it shows it is trying to connect but never does

Category (Required)

CRM

Source

Portal

Solution: User need to restart PC to force all the applications to startup in the correct order to communicate properly.

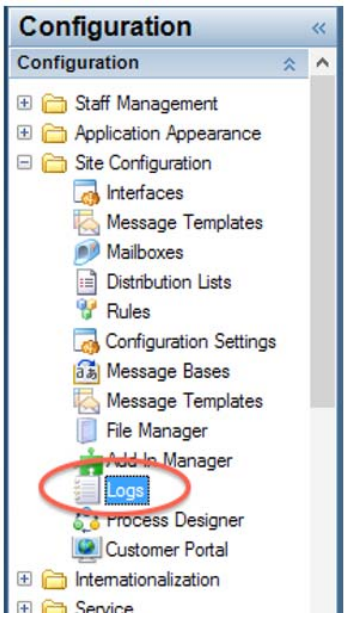
Troubleshooting Tools

Error Logs

Standard Logs

Standard Product Error and Information logs are available to Administrative users through the “Logs” Workspace. This Workspace can be found in the “Configuration” Navigation Section under the “Site Configuration” folder.

Figure 3 – Error Log



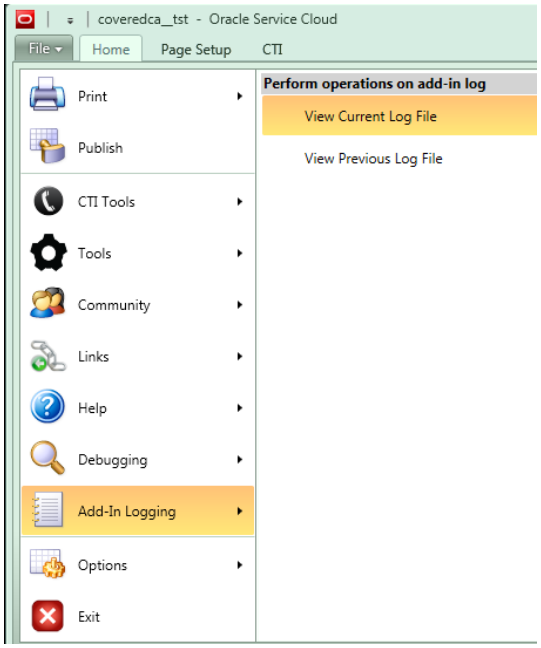
Custom Business Objects Error Log

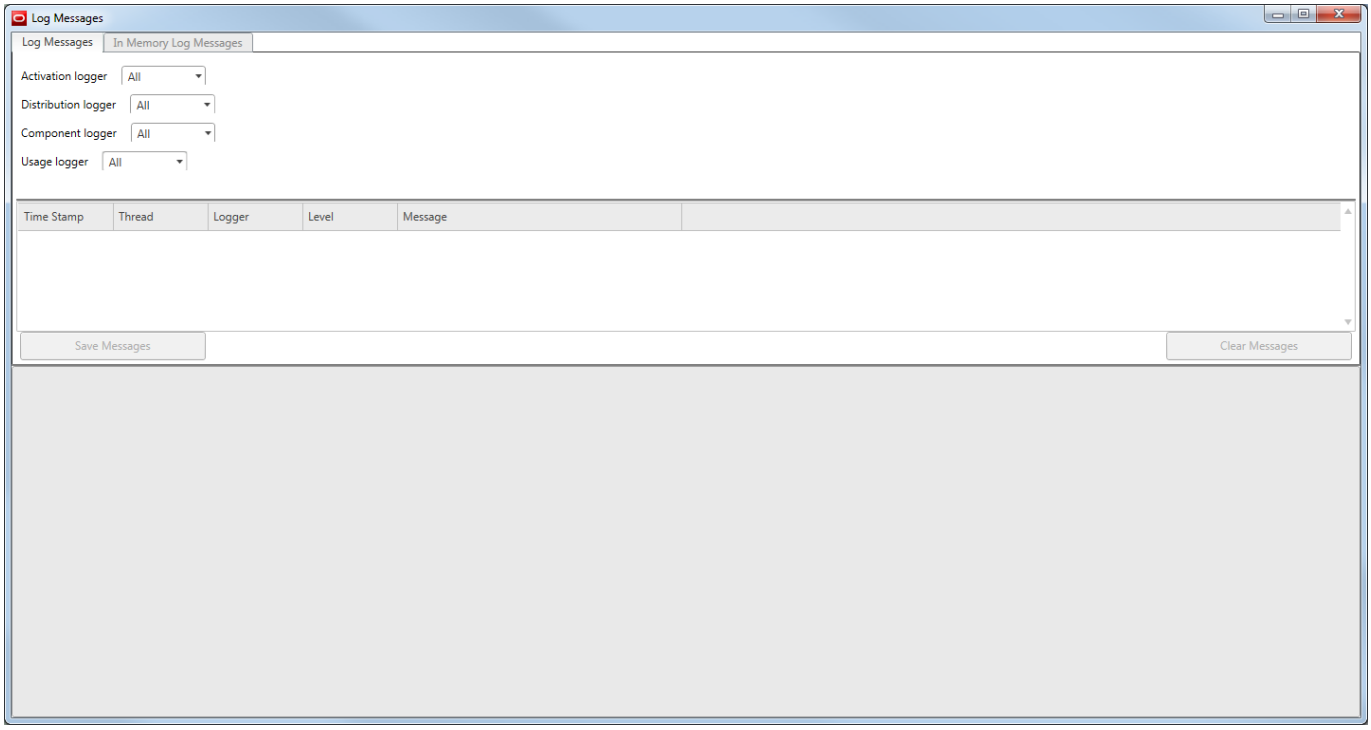
Many of the customizations will log errors and warnings to a Custom Business Object (CBO) named “Log.Entry”. There is no shared report for this table; administrators should create their own Private Reports against this CBO if the need arises.

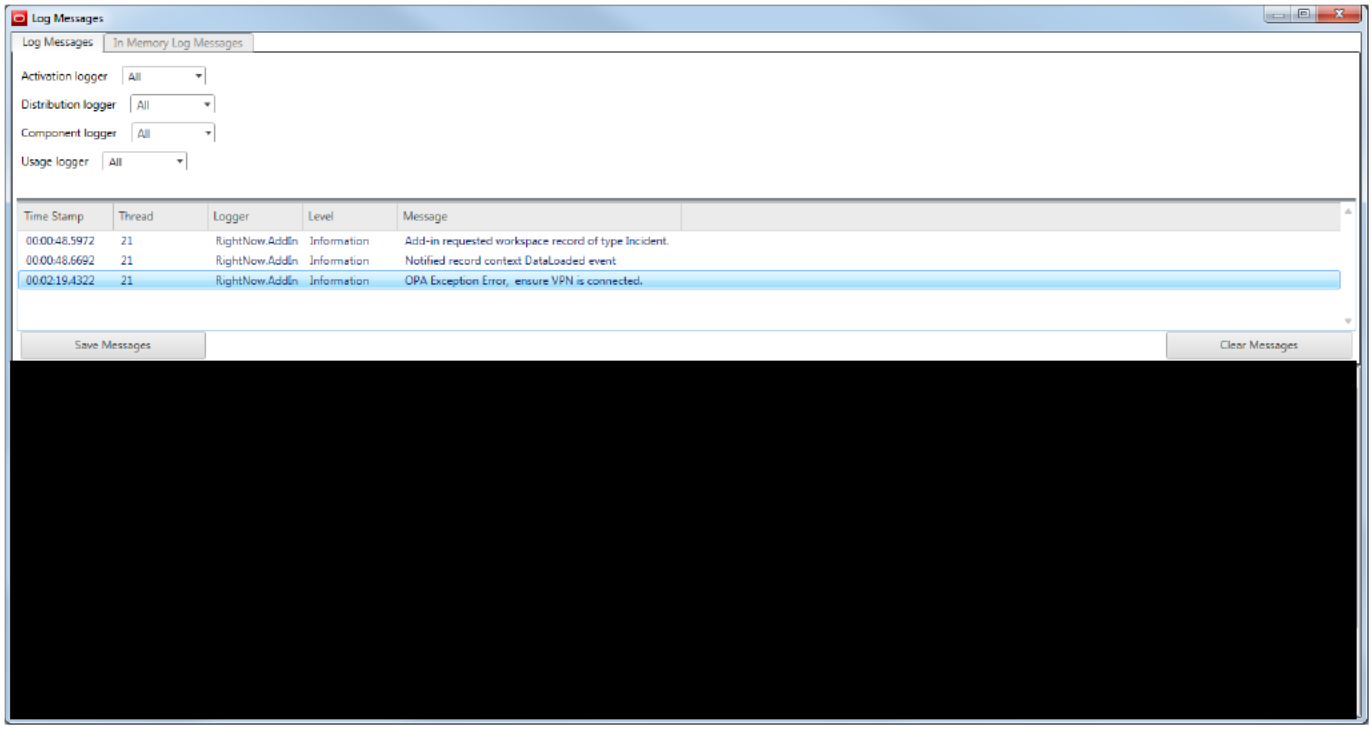
Add In Logging

Steps to turn on Add-In Logging for diagnostic purposes:

1. Go to File Tab
2. Add-In Logging
3. View Current Log File
4. Select All for all the logger drop downs
5. Move this window to the side
6. Return to the CRM console and run the functionality that is in question (Quicksort, CTI…)
7. When Error or behavior you are investigating is experienced you can go back to the Log Messages Window and hit the Save Messages button.
8. The Save Messages will save a text file of the system add-in logs and this can be used for diagnosing problem or sending to Oracle or contractor for further diagnosis.


coveredca_tst - Oracle Service Cloud
File
Home
Page Setup
CTI
Print
Publish
CTI Tools
Tools
Community
Links
Help
Debugging
Add-In Logging
Options
Exit
Perform operations on add-in log
View Current Log File
View Previous Log File

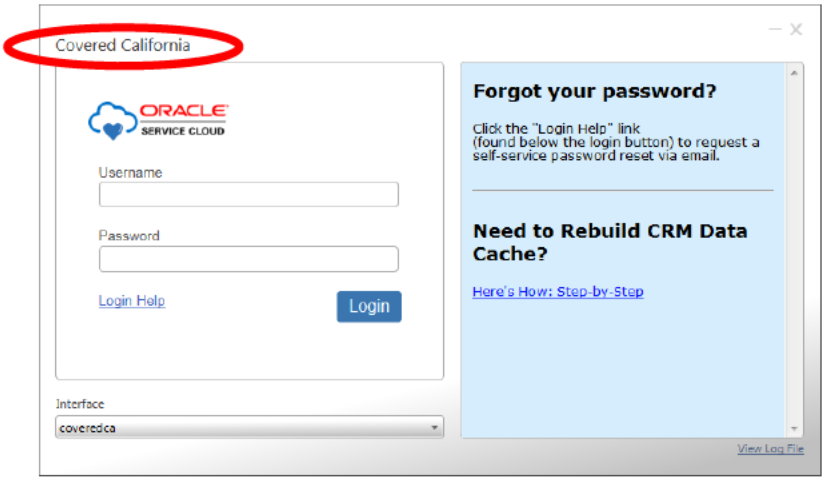

Log Messages
Log Messages
In Memory Log Messages
Activation logger
All
Distribution logger
All
Component logger
All
Usage logger
All
Time Stamp
Thread
Logger
Level
Message
Save Messages
Clear Messages


Log Messages
Log Messages
In Memory Log Messages
Activation logger
All
Distribution logger
All
Component logger
All
Usage logger
All
Time Stamp
Thread
Logger
Level
Message
00:00:48.5972
21
RightNow.AddIn
Information
Add-in requested workspace record of type Incident.
00:00:48.6692
21
RightNow.AddIn
Information
Notified record context DataLoaded event
00:02:19.4322
21
RightNow.AddIn
Information
OPA Exception Error, ensure VPN is connected.
Save Messages
Clear Messages

6.0 Configuration

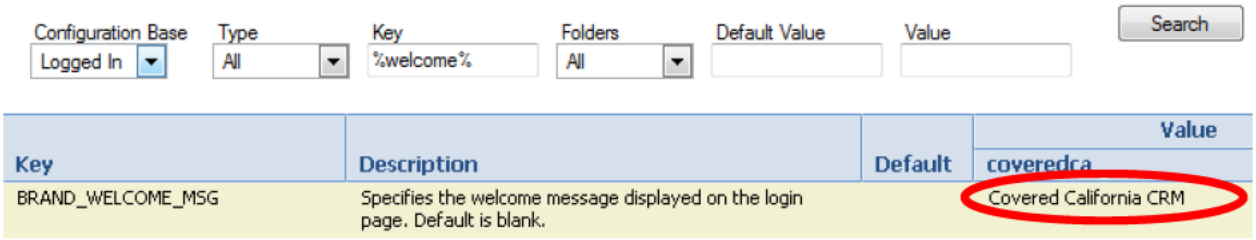
6.1 Welcome/Login Messaging

Specifies the welcome message displayed on the login page.



Message Configuration

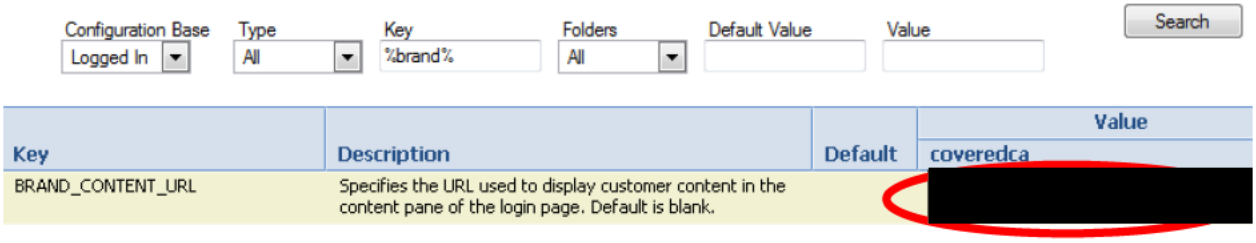
- **Configuration > Site Configuration > Configuration Settings**
  Search Key: %welcome%

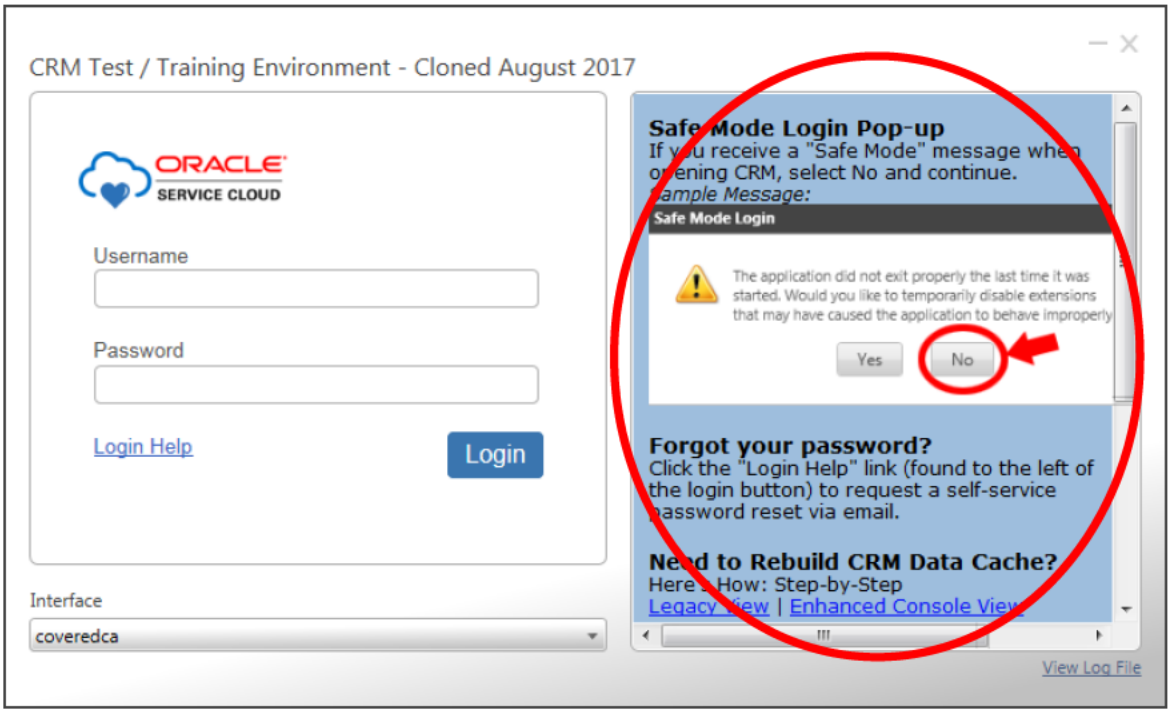


6.2 CRM Communications Window

Specifies the URL used to display custom contact of the login page.

- **The URL is set in the Configuration > Site Configuration > Configuration Settings**
  Search Key: %brand%

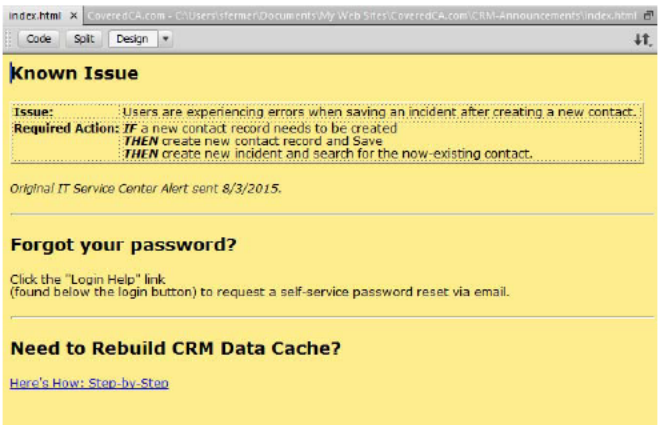




The HTML content of this page is managed by the Covered CA Webmaster via Dreamweaver.

Page location for Dreamweaver: [redacted]

Dreamweaver view:



6.3 IP Security Blocking

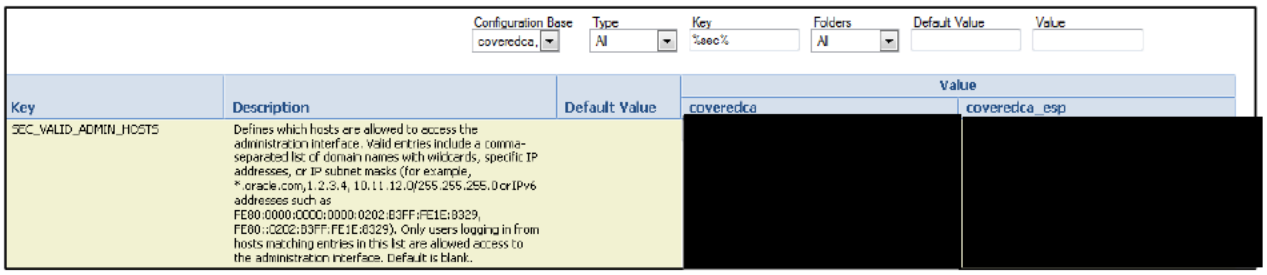
Defines which IPv4 and IPv6 addresses that are allowed to access the client desktop console.

Configuration > Site Configuration > Configuration Settings
Search Key: %sec%

Oracle KB: https://cx.rightnow.com/app/answers/detail/a_id/245/kw/SEC_VALID_ENDUSER_HOSTS

Important Notes:

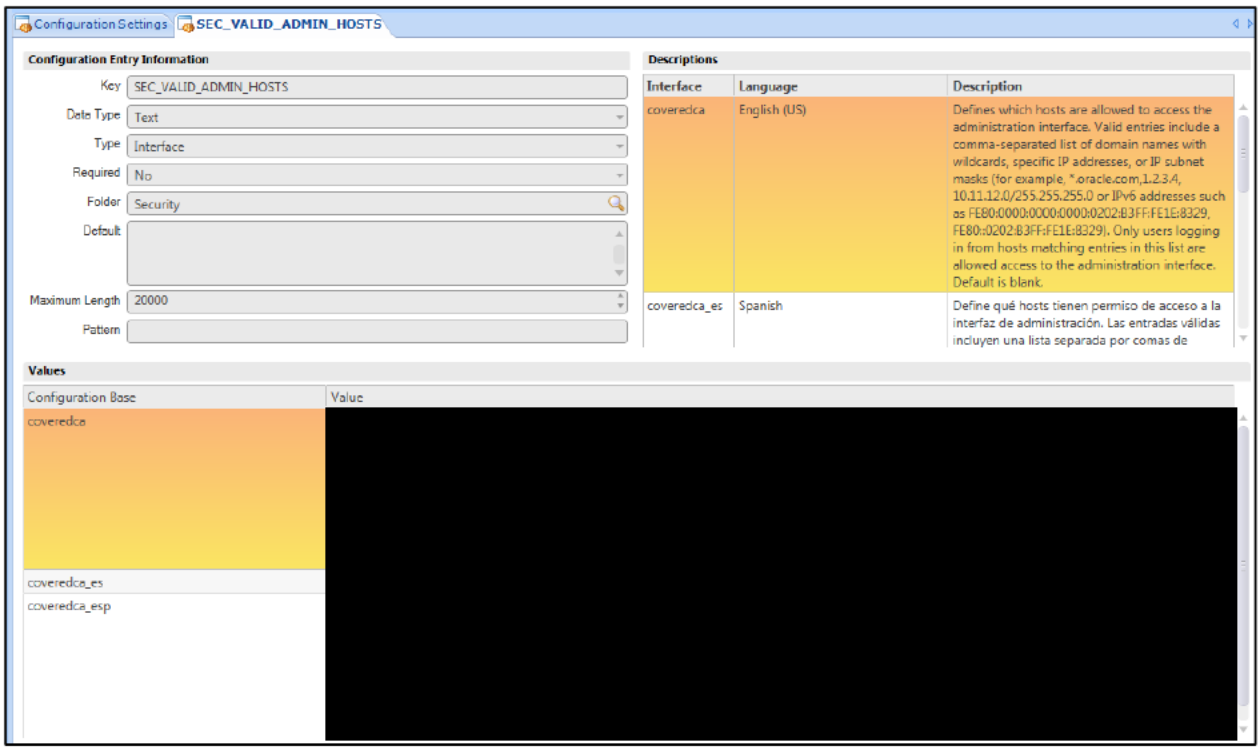
- **There are no spaces or line breaks allowed in the string, separate IP values with a comma only.**
- **Only edit values in this view: (Click once in Value field)**



Configuration Base: coveredca, | Type: All | Key: %sec% | Folders: All | Default Value | Value

Key	Description	Default Value	Value	
			coveredca	coveredca_esp
SEC_VALID_ADMIN_HOSTS	Defines which hosts are allowed to access the administration interface. Valid entries include a comma-separated list of domain names with wildcards, specific IP addresses, or IP subnet masks (for example, *.oracle.com,1.2.3.4, 10.11.12.0/255.255.255.0 or IPv6 addresses such as FE80:0000:0000:0000:0202:B3FF:FE1E:8329, FE80::0202:B3FF:FE1E:8329). Only users logging in from hosts matching entries in this list are allowed access to the administration interface. Default is blank.		[redacted]	[redacted]

- **Do not edit values in this view – via Double-click:**
  (System is inconsistent in applying changed values from this view)
- **Do not use ranges, IPs entered as a range will not be able to see the Knowledgebase implementation that is currently configured. (The IP addresses used in this configuration are used by a Customer Portal Script to allow agents to view KB articles as a non-public web site)**



To check which IP address you are connecting from you can visit the following URL: https://cx.rightnow.com/app/utils/whatsmyip

6.4 Chat Hours & Holidays

Chat hours are configurable in the CRM system. These hours specify during what time intervals a user can request a chat session with an SCR. Additionally; holidays when chat is unavailable are configured in the CRM system.

The hours of operation are configured according to the hours provided by Service Center management via Help Desk ticket.

6.4.1 Hours Configuration

English Interface

1. Navigate to Configuration > Site Configuration > Interfaces
2. Select Interface 'coveredca'
3. Select 'Chat Hours' from the top ribbon
4. Update as needed
5. Save

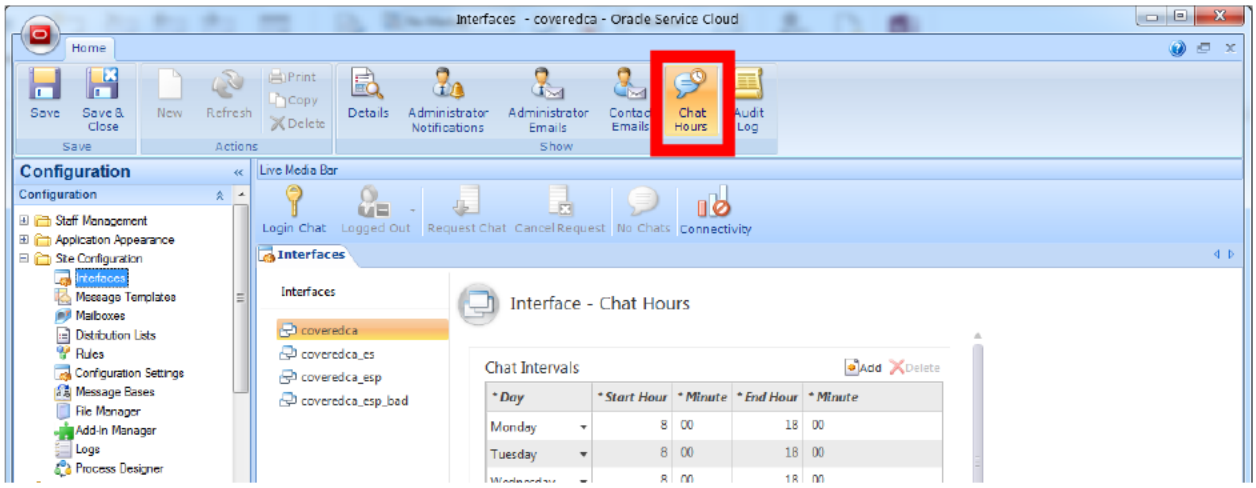
Spanish Interface

1. Navigate to Configuration > Site Configuration > Interfaces
2. Select Interface 'coveredca-esp'
3. Select 'Chat Hours' from the top ribbon
4. Update as needed
5. Save & Close

Details on configuring Chat can be found in the Oracle Service Cloud CX User Guide

http://documentation.custhelp.com/euf/assets/docs/february2016/olh/wwhelp/wwhimpl/js/html/wwhelp.htm?context=crm

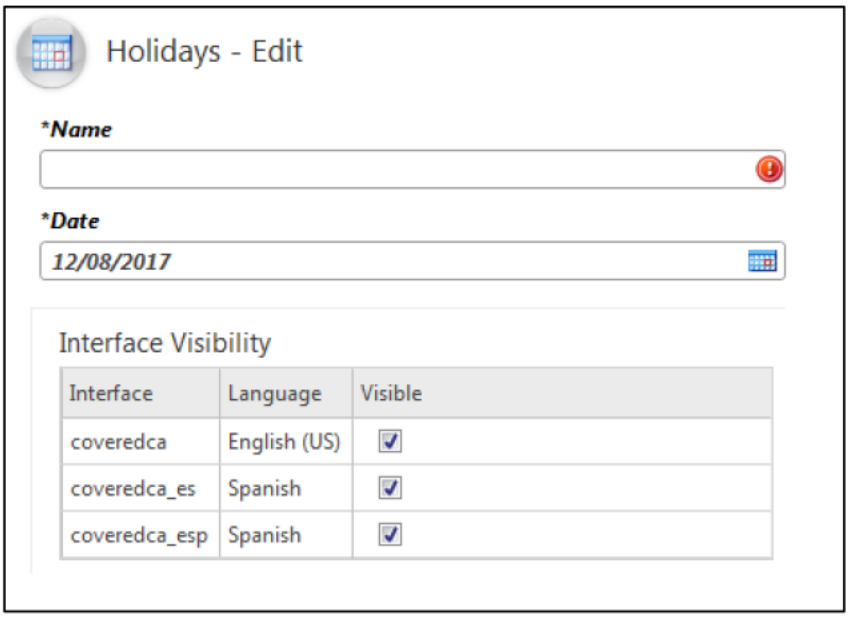
Search Term: chat hours



6.4.2 Holiday Configuration

English Interface

1. Navigate to Configuration > Service > Service Level Agreements > Holidays
2. Select New from the Home ribbon
3. Enter the Holiday name, prefixed by the year (Ex, 2018 New Year's Day)
4. Verify all interfaces and selected for visibility.
5. Save



6.5 Profiles – Staff Accounts

Best practice to create new Profiles - Copy and tweak an existing profile with similar settings and permissions. Details on creating and changing Profiles can be found in the Oracle Service Cloud CX User Guide: Oracle Service Cloud CX Documentation.

Naming convention: Retired/archived profile names have a "z" added to the beginning of the name and listed alphabetically at bottom of profile list. Profiles are not deleted to keep historical/audit references.

Current profile list as of 12/20/2017 :

Profile ID	Profile
199	_CoveredCA Full Admin
259	_CoveredCA Full Admin - AppDev Team
251	_CoveredCA Help Desk
208	Amberleaf Full Admin
211	ER - Group 1
212	ER - Group 2
213	ER - Group 3
214	ER - Group 4
215	ER - Group 5
216	ER - Group 6
217	ER - Group 7
206	Event Management
210	External Affairs Analyst
271	Global Read Only
269	Hotline SCR
270	Hotline Supervisor
246	KB Admin
247	KB Manager
99	Marketing Admin
218	OCP Analyst
219	OCP Manager
286	Ombudsman
236	PSU Analyst
238	PSU Manager
237	PSU Supervisor
287	QA Analyst
288	QA Manager
207	R&R Appeals
220	R&R Appeals - Management
245	Sales CCSB - Manager
242	Sales CCSB - Tier 1 (Common)
244	Sales CCSB - Tier 2
229	SCR (Common)
258	SCR Accessibility
232	SCR Chat - English
233	SCR Chat - Spanish
266	SCR Chat - Supervisor - Enhanced
256	SCR Director

285	SCR Lead
234	SCR Manager
231	SCR Supervisor
249	WorkForceMgmt
49	x API Access - No Privs

6.6 Groups – Staff Accounts

Each Profile created in Oracle Service Cloud must be assigned to a Staff Account Group in order to assign permissions and Navigation Sets.

Group
CCU KB Team
Eligibility Operations
Fresno
HQ Communications
HQ External Affairs
HQ Marketing
Office of Consumer Protection
Ombudsman
Pinnacle - BO
Pinnacle - SC
Program Integrity
R&R Appeals
R&R Appeals Project
Rancho Cordova
Rancho Cordova - Back Office
Rancho Cordova - Escalations Resolution
Rancho Cordova - Hotline
Rancho Cordova - QA Team
Surge
WorkForceMgmt

Details on configuring Profiles and Staff Account Groups can be found in the Oracle Service Cloud CX User Guide: Oracle Service Cloud CX Documentation.

Note: To Ensure all custom AddIns are working properly, all profiles have Session Authentication turned on for both Public SOAP API and Public Knowledge Foundation API (Profiles – Permissions – Administration).

6.7 Queues

Queues ensure that Incidents are properly routed and escalated within the Covered California Service Centers. All archived queues have a "z" at the beginning of the name and it listed alphabetically at the bottom of the queue list. Active Queues by Profile:

	Appeals Incident WS	OCP Incident WS with Appeals	Common Incident WS - Sales CCSB	Sales CCSB Incident (NonEnhanced)	Common Incident WS - SCR	CRT Incident WS	Incident_EC	SCR Incident (NonEnhanced)	SCR Incident (NonEnhanced)	HOTLINE Incident WS	Marketing - Outreach -- Incident WS	
No Value		X		X			X					
1095					X							
1095 Dispute					X			X		X		
2nd Level Appeals	X	X										
Access to Care												not used
Appeals Mgr	X											
Back Office - Supervisor												not used
CEC General English				X								
CEC General Spanish				X								
CEC Manager				X								
CEC Team Lead				X								
Complaints - Spanish												not used
CRT		X			X	X	X	X	X			
CRT Supervisor	X	X				X	X		X	X		
EC-Admin Dismissal							X					
EC-CDPH							X					
EC-Complaints							X					
EC-DMHC							X					
EC-EA							X					
EC-EXT							X					
EC-HCA							X					
EC-INT	X	X				X	X		X	X		
EC-MGR							X					
External Affairs							X					
Hotline	X	X	X	X		X	X		X	X		
Hotline - County Liaison						X	X		X	X		
Hotline - Help Desk Ticket										X		
Hotline - Voice										X		
HQ Hearings	X	X										
Office of Consumer Protection	X	X		X		X	X		X	X		
Outreach Mailbox											X	
QAT Queue					X			X	X	X		
R&R Appeals	X	X										
Sales CCSB Agent Certification			X	X								
Sales CCSB COBRA			X	X								
Sales CCSB Eligibility			X	X								
Sales CCSB Email				X								
Sales CCSB Financial Management			X	X								
Sales CCSB LMS			X	X								
Sales CCSB Manager			X	X								
Sales CCSB Tier 1			X	X								
Sales CCSB Tier 2			X	X								
SCR					X			X	X			
SCR Lead		X						X				
SCR Supervisor	X	X			X	X	X	X	X	X		

6.8 Workspaces

Each Workspace (Contact, Incident, Chat, etc.) has a custom layout to display particular, relevant information in the Oracle Service Cloud console. Details on creating and configuring Workspaces can be found in the Oracle Service Cloud CX User Guide: Oracle Service Cloud CX Documentation.

6.9 Navigation Sets

Each Profile is assigned a particular Navigation Set, which dictates the visible information and layout of the user's Oracle Service Cloud console. Details on creating and configuring Navigation Sets can be found in the Oracle Service Cloud CX User Guide: Oracle Service Cloud CX Documentation.

Navigation Sets have a direct relationship to Reports. Every time a custom report is created, it will need to have the proper permissions and need to be added to the user Profile's NavSet.

Refer to Appendix ___ for Matrix

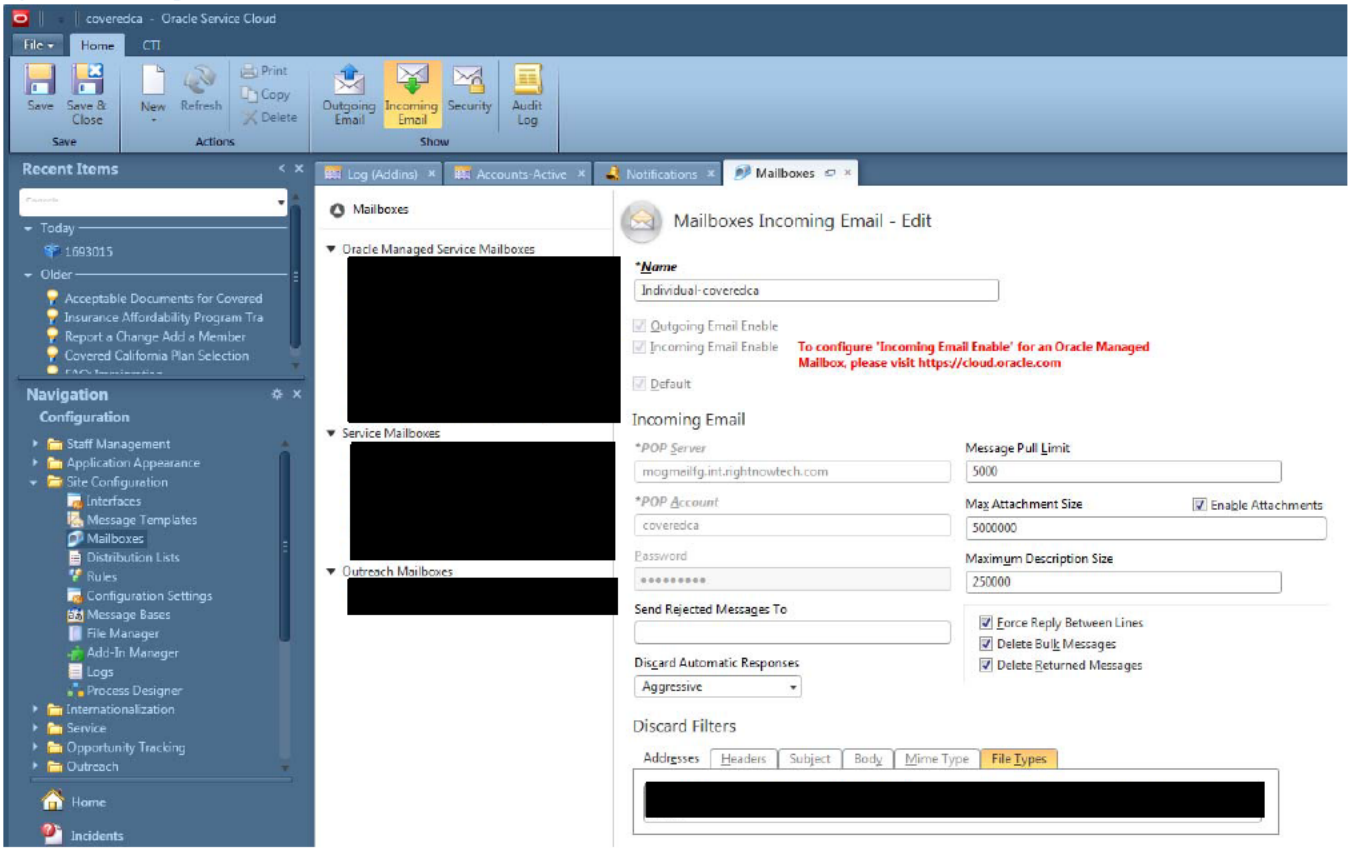
6.10 Email Integration

Covered California uses Oracle-managed Service mailboxes to facilitate email communication. The table below is an overview of the mailbox configuration.

Mailbox Type	Account Name	Address	Forwarding From
Service	[redacted]	[redacted]	
	[redacted]	[redacted]	[redacted]
	[redacted]	[redacted]	[redacted]
	[redacted]	[redacted]	[redacted]
	[redacted]	[redacted]	[redacted]
	[redacted]	[redacted]	[redacted]
	[redacted]	[redacted]	[redacted]
Outreach	[redacted]	[redacted]	

6.10.1 Email SPAM Management

Spam Filtering within CRM



Configuration > Site Configuration > Mailboxes > Incoming Email

Discard Filters: Add emails separated by a comma

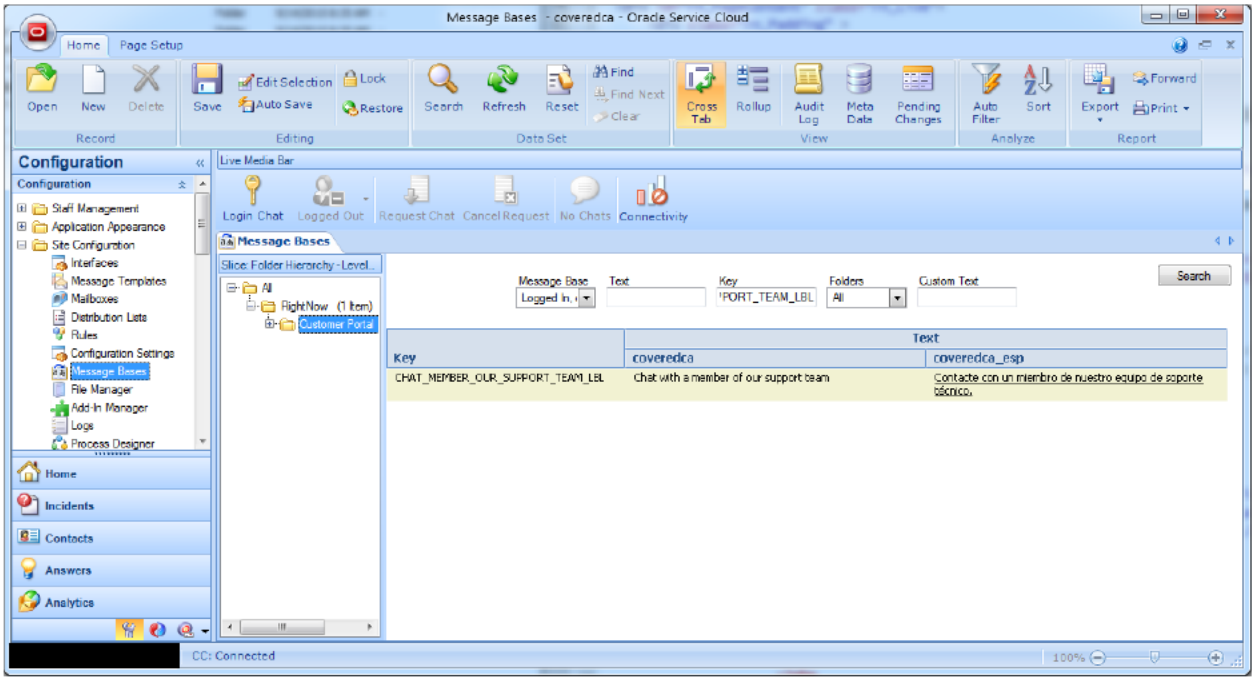
Spam Filtering – Barracuda Email Security Gateway

Refer to https://cx.rightnow.com/app/answers/detail/a_id/2345/kw/report%20mail%20header/related/1

6.11 Message Bases

Chat Launch

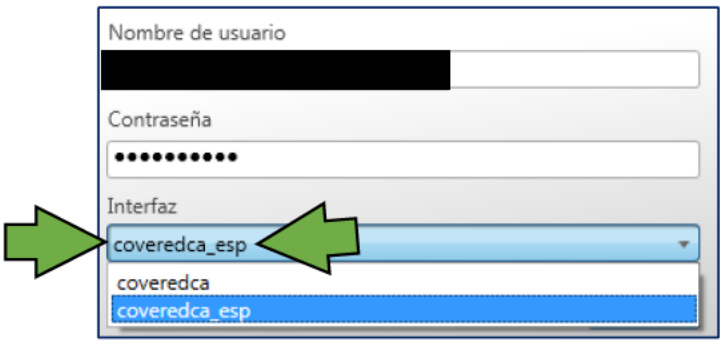
English and Spanish chat interfaces have Messages Bases with custom text. This is managed within the Site Configuration of the English console.

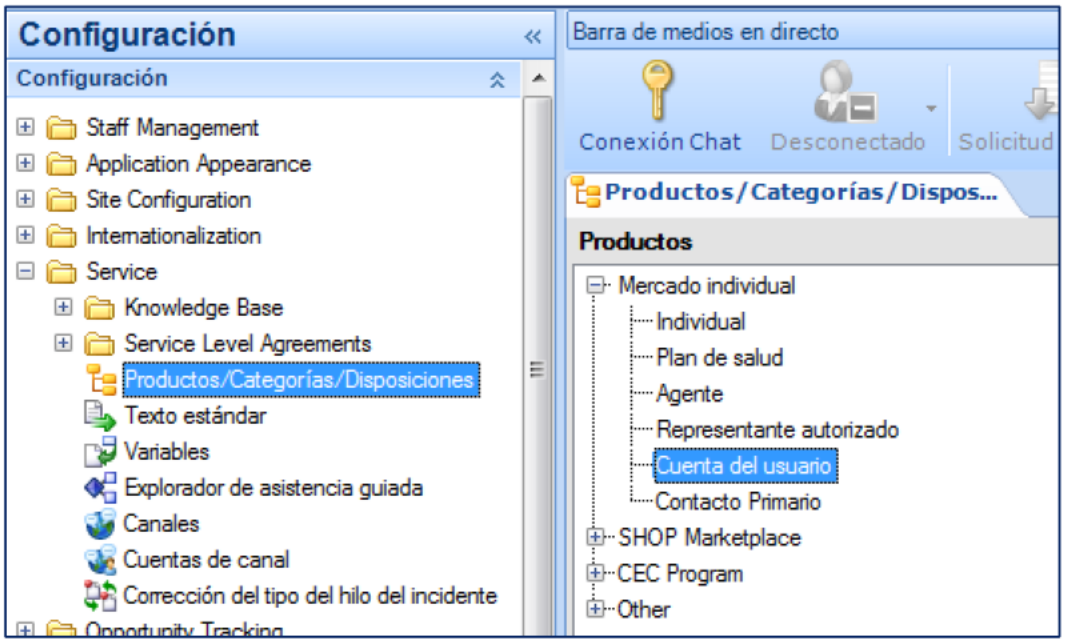


Chat Role (Product)

The "Contacting us as?" (aka Role) is maintained via the Configuration > Service > Service Level Agreements > Product/Categories/Dispositions

IMPORTANT: This specific item needs to be updated in both the English interface and via the Spanish interface. The Spanish interface cannot be selected within the Product/Categories/Dispositions. In order to update the Spanish values, the Admin user must select the "coveredca_esp" interface from the login screen, then navigate to Configuración > Service > Service Level Agreements > Productos/Categarías/Disposiciones





7.0 Incident Management

Service Center Representatives record customer interactions with Oracle Service Cloud Incident Records. Customers can contact the Service Center by one of the channels listed below.

Phone

Incidents are automatically created when a customer successfully reaches the Service Center via the IVR phone system. Please refer to Section 1.7.9 – CTI Integration Simulation to view the fields that are automatically populated in the Incident Record.

Email

Incidents are automatically created when a customer replies to an email sent from the CRM, the response is linked to the corresponding Contact Record. Section 1.8.5 – Email Integration previews Oracle Service Cloud mailbox settings outlined in the Configuration Workbook.

Mail/Fax

Incoming mail and faxes are processed through Novitex and posted to SharePoint. Attachments can then be uploaded by Service Center users to corresponding Contact or Incident records.

Chat

A user accesses chat through a link on the CalHEERS portal. This link opens a CRM hosted page that initializes the chat session in the browser and connects to an SCR if available. If no SCR is available, the user will be placed in a wait queue until an SCR becomes available.

English: https://coveredca.custhelp.com/app/chat/chat_launch

Spanish: https://coveredca-esp.custhelp.com/app/chat/chat_launch

Upon completing a Chat session, an Incident record is automatically created for the SCR to update Incident and Contact details. Oracle Service Cloud Chat configuration is based on standard Chat settings with minor configuration changes to accommodate the SCR Chat business requirements.

8.0 Scripting

When a customer contacts the Service Center, the SCR uses Oracle Service Cloud's Script feature to facilitate the flow of the call and gather pertinent information. The Visio below outlines the questions, responses, and flow of a call:

- Appendix 16.3.66 – Incoming Call and Incident Scripting

Details on configuring Scripting can be found in the Oracle Service Cloud CX User Guide:

https://documentation.custhelp.com/euf/assets/docs/february2015/olh/wwhelp/wwhimpl/js/html/wwhelp.htm?tab=2

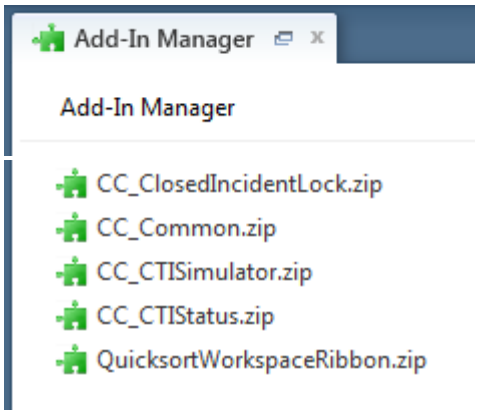
9.0 Standard Text

Standard Text allows SCRs to automatically populate a reply in the Incident thread. Details on configuring Standard Text can be found in the Oracle Service Cloud CX User Guide:

10.0 Add-in Manager

The Add-In Manager lets you quickly upload files and assign profile permissions to use the add-ins. You can also specify custom values for .NET attributes from the Add-In Manager. You can specify different values for each profile and interface and the specified values are stored in the Oracle database. This eliminates the need to store custom values for attributes in client-side XML configuration files. The Add-In Manager is also used to remove add-ins that you no longer use.

The add-ins were created by Accenture prior to Covered CA IT taking on the CRM Project. CCIT now maintains these add-ins.



10.1 Closed Incident Lock

/Site Configuration/Add-in Manager > **CC_ClosedIncidentLock.zip** > Profile Access

This add-in is enabled for all active user profiles

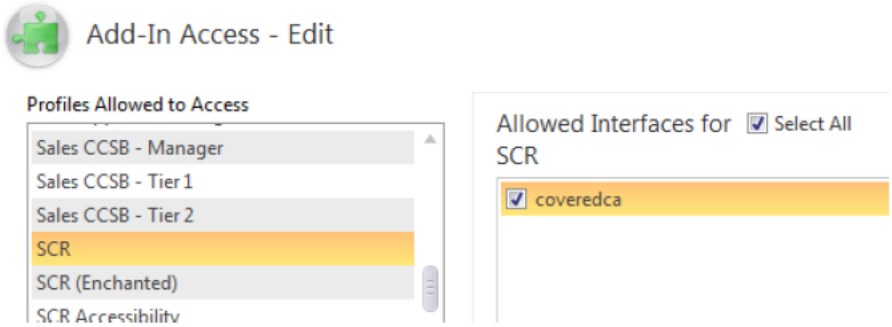
Server Configuration Properties

Class Name	Property Name	Value
CC_ClosedIncidentLock.Factory	EventName	CLOSED_INCIDENT
CC_ClosedIncidentLock.Factory	MaxAgeInDays	5

10.2 Common

/Site Configuration/Add-in Manager > CC_Common.zip > Profile Access

This add-in is enabled for all active user profiles



Server Configuration Properties

Class Name	Property Name	[redacted]
CC_Common.Component	CalHEERS_AgentDetailsEndpoint	[redacted]
CC_Common.Component	CalHEERS_AgentSearchEndpoint	[redacted]
CC_Common.Component	CalHEERS_ApplicationDetailsEndpoint	[redacted]
CC_Common.Component	CalHEERS_CaseDetailsEndpoint	[redacted]
CC_Common.Component	CalHEERS_ContactSearchEndpoint	[redacted]
CC_Common.Component	CalHEERS_CRMCertPassword	[redacted]
CC_Common.Component	CalHEERS_CRMServicePassword	[redacted]
CC_Common.Component	CalHEERS_CRMServiceUsername	[redacted]
CC_Common.Component	CalHEERS_EmployerApplicationEndpoint	[redacted]
CC_Common.Component	CalHEERS_EmployerDetailsEndpoint	[redacted]
CC_Common.Component	CalHEERS_EmployerEmployeeEnrollmentEndpoint	[redacted]
CC_Common.Component	CalHEERS_EmployerEmployeeRosterEndpoint	[redacted]
CC_Common.Component	CalHEERS_EmployerEnrollmentEndpoint	[redacted]
CC_Common.Component	CalHEERS_EmployerSearchEndpoint	[redacted]
CC_Common.Component	CalHEERS_EntityDetailsEndpoint	[redacted]
CC_Common.Component	CalHEERS_EntitySearchEndpoint	[redacted]
CC_Common.Component	CalHEERs_MaxAgeInMinutes	[redacted]
CC_Common.Component	CalHEERS_OrgDetailsEndpoint	[redacted]
CC_Common.Component	CalHEERS_UseProductionCertificate	[redacted]
CC_Common.Component	CalHEERSSearchEnabled	[redacted]
CC_Common.Component	RoleID_Agent	[redacted]
CC_Common.Component	RoleID_Employer	[redacted]
CC_Common.Component	RoleID_Entity	[redacted]
CC_Common.Component	RoleID_Individual	[redacted]
CC_Common.Component	SHOPFeaturesEnabled	[redacted]

10.2.1 SSL Certificates

[redacted]

[redacted]

[redacted]

- [redacted]
- [redacted]

[redacted]

[redacted]

10.2.2 Visual Studio Project

Once recompiled (Rebuilt), navigate to the bin folder and compress the primary files to be uploaded for the addin package.

Sample bin folder location:

[redacted]

Important: The file name for the compressed file [redacted]

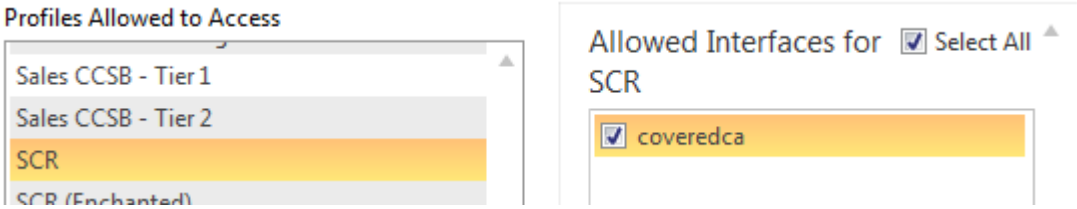
Required/primary files to include in the zip package that is uploaded into the CRM:

- [redacted]
- [redacted]
- [redacted]

10.3 CTI Simulator

/Site Configuration/Add-in Manager > **CC_CTISimulator.zip** > Profile Access

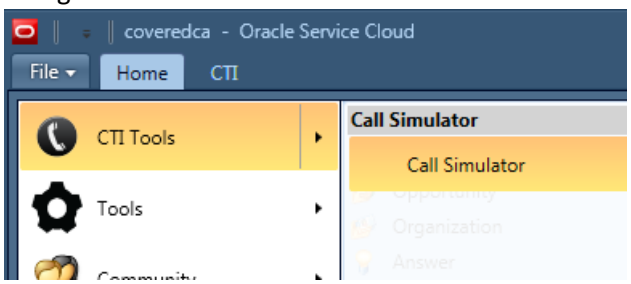
This add-in is enabled only for profiles using the IVR/CTI workflow script



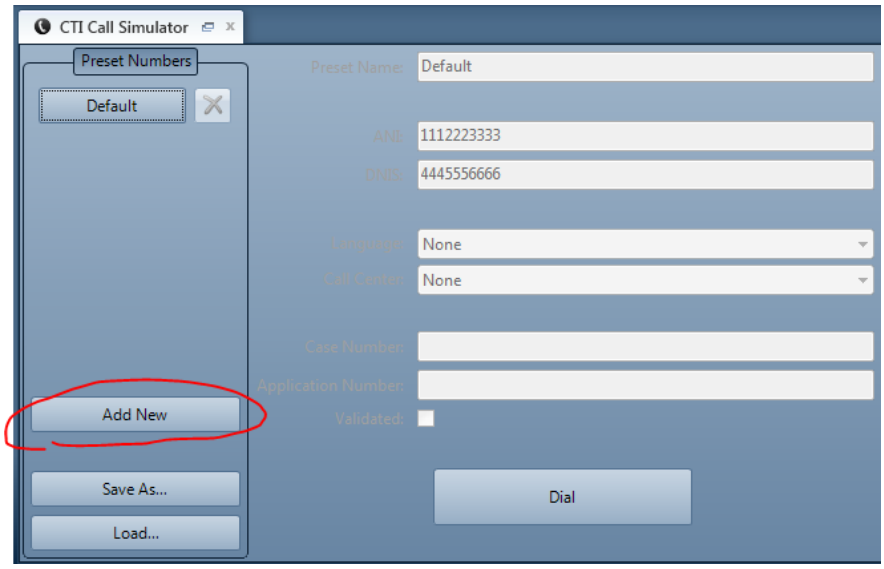
There are no Server Configuration Properties for this add-in

10.3.1 CTI Simulator Sample:

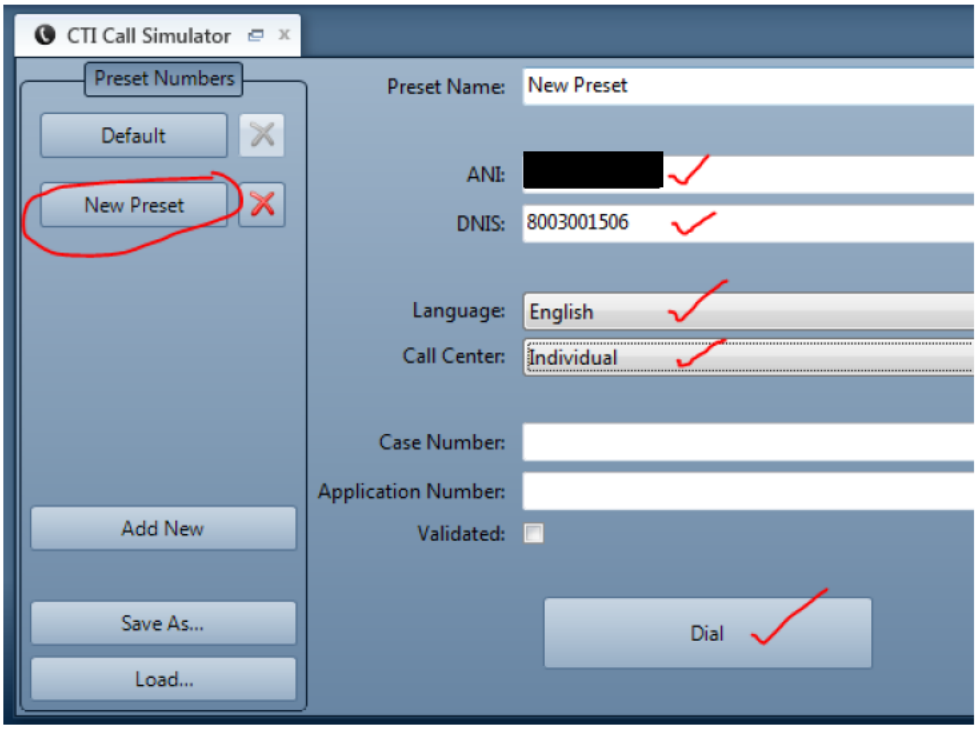
1. Navigate to File > CTI Tools > Call Simulator



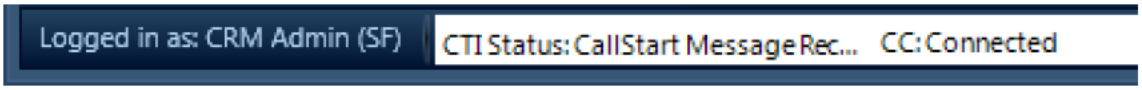
2. Click "Add New"



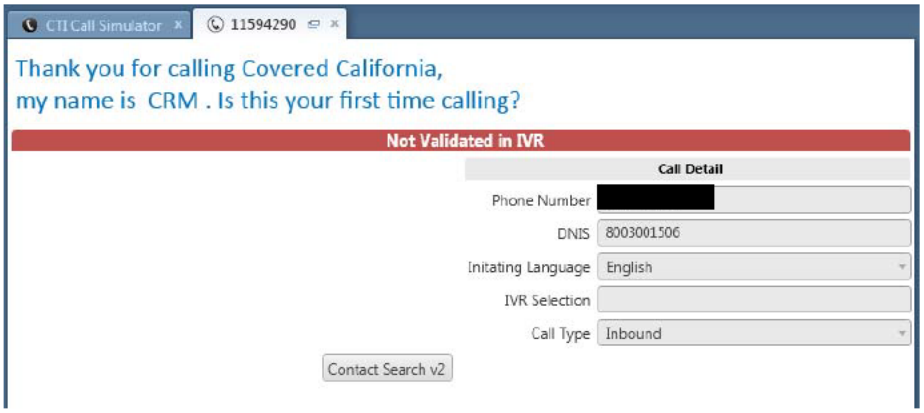
3. Click "New Present"
   Enter the following:
   - ANI (The consumers phone number)
   - DNIS (Service center phone number)
   - Language
   - Call Center
   and click Dial



4. In the status bar of the CRM window you will see the CTI Status text changing…



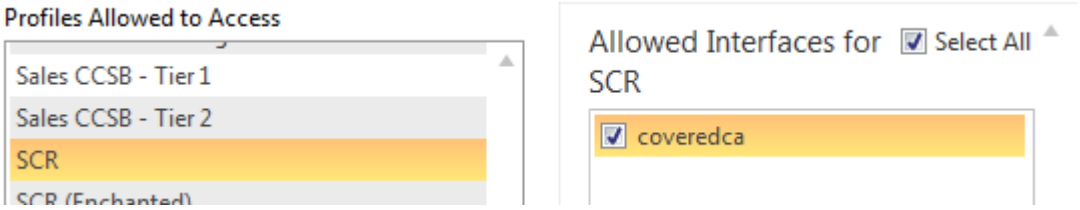
5. Then the CallDetails script will appear…



10.4 CTI Status

/Site Configuration/Add-in Manager > **CC_CTIStatus.zip** > Profile Access

This add-in is enabled only for profiles using the IVR/CTI workflow script



Server Configuration Properties

Class Name	Property Name	Value
CC_CTIStatus.Component	CalHEERsLookup	☐
CC_CTIStatus.Component	CallTypeCBO	CTI.CallType
CC_CTIStatus.Component	LanguageCBO	CC.Language
CC_CTIStatus.Component	PipeName	\\.\pipe\CTIPipeName
CC_CTIStatus.Component	ProgramCBO	CTI.Program
CC_CTIStatus.Component	VerboseLogging	☐

Profiles Allowed to Access

Sales CCSB - Tier 1
Sales CCSB - Tier 2
SCR
SCR (Enchanted)

Allowed Interfaces for SCR ☑ Select All

☑ coveredca

Server Configuration Properties

Class Name	Property Name	Value
QuicksortWorkspaceRibbon.Factory	dummyContactSpecifier	
QuicksortWorkspaceRibbon.Factory	dummyFirst	
QuicksortWorkspaceRibbon.Factory	dummyLast	
QuicksortWorkspaceRibbon.Factory	endpointAddress	
QuicksortWorkspaceRibbon.Factory	transferMessage	

[redacted]

[redacted]

[redacted]

[redacted]

11.0 Importing Data

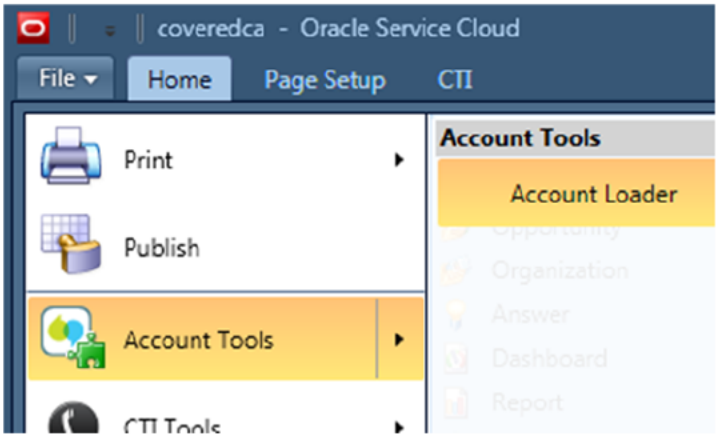
It is recommended that the Import Wizard no longer be used for Covered CA purposes.

12.0 User Account Bulk Importing/Updating

Data import utility for administrators to create or update staff accounts in batches on demand.

Account Import TDD, authored by RightNow:

[redacted]



Data format reminders:

- Display Name = First Name
- Login & Email are lower-case

Templates can be found on SharePoint.

[redacted]

13.0 Knowledgebase

13.1 Sibling Articles Workaround

To view sibling articles, the following code was added to ***/dav/cp/customer/views/pages/answers/detail.php***

Only allows users from the `SEC_VALID_ADMIN_HOSTS` list, maintained in the ServiceCloud Site Configuration settings.

[redacted]

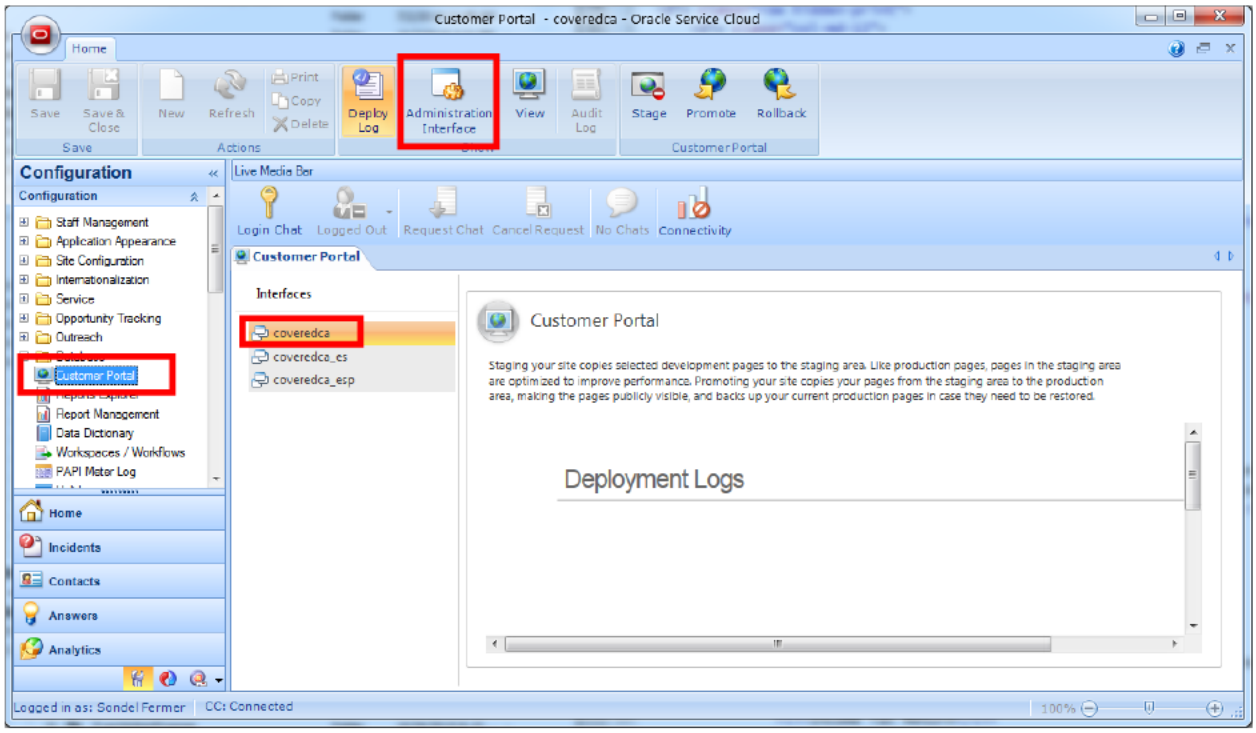
14.0 Customer Portal

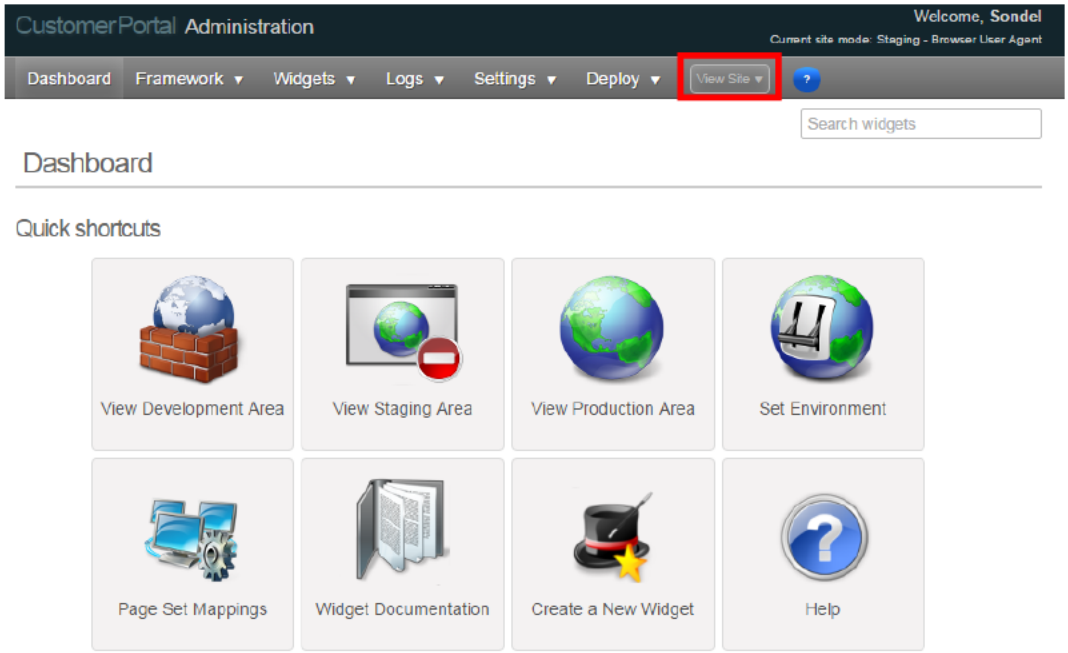
Custom Portal pages are PHP and edited within Dreamweaver.

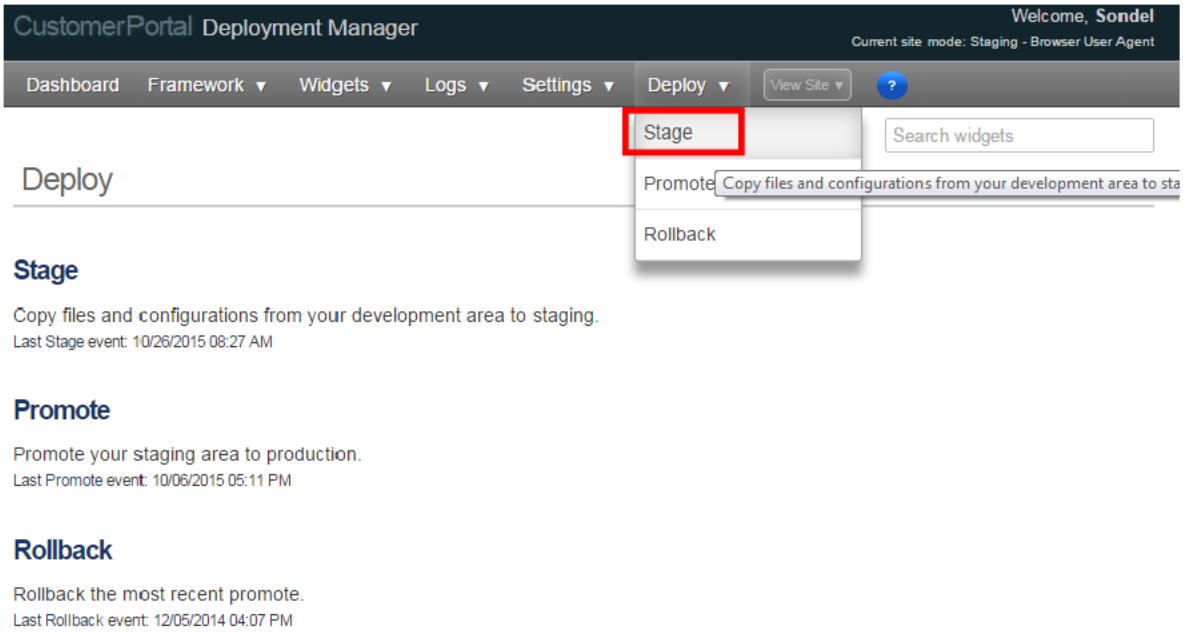
[redacted]

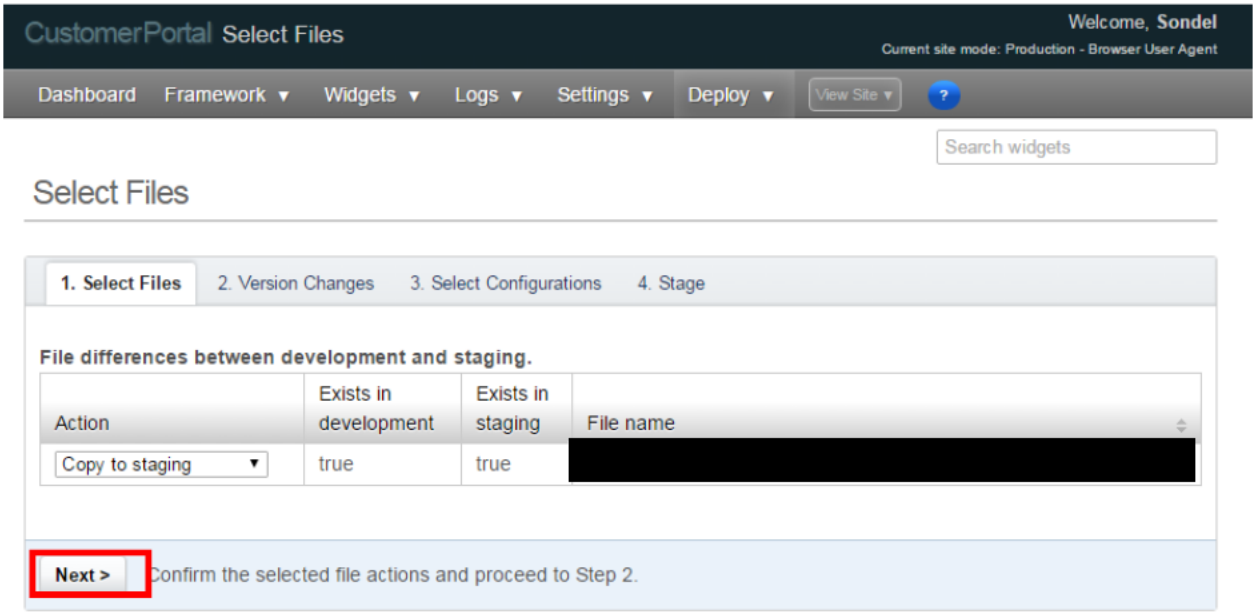
14.2 Deploy to Stage

There are two interfaces, an English and a Spanish interface. Each interface must be Staged and Deployed within their own interface.






CustomerPortal Deployment Manager
Welcome, Sondel
Current site mode: Staging - Browser User Agent
Dashboard
Framework
Widgets
Logs
Settings
Deploy
View Site
Stage
Promote
Copy files and configurations from your development area to sta
Rollback
Search widgets
Deploy
Stage
Copy files and configurations from your development area to staging.
Last Stage event: 10/26/2015 08:27 AM
Promote
Promote your staging area to production.
Last Promote event: 10/06/2015 05:11 PM
Rollback
Rollback the most recent promote.
Last Rollback event: 12/05/2014 04:07 PM


CustomerPortal Select Files
Welcome, Sondel
Current site mode: Production - Browser User Agent
Dashboard
Framework
Widgets
Logs
Settings
Deploy
View Site
Search widgets
Select Files
1. Select Files
2. Version Changes
3. Select Configurations
4. Stage
File differences between development and staging.
Action
Exists in development
Exists in staging
File name
Copy to staging
true
true
[redacted]
Next >
Confirm the selected file actions and proceed to Step 2.

CustomerPortal Select Version Upgrades

Welcome, Sondel
Current site mode: Production - Browser User Agent

Dashboard | Framework | Widgets | Logs | Settings | Deploy | View Site

Search widgets

Select Version Changes

1. Select Files | 2. Version Changes | 3. Select Configurations | 4. Stage

Framework Changes

There are no framework differences to display.

Widget Changes

There are no widget differences to display.

Push all framework and widget version changes?

No version updates to deploy

Next > Confirm the selected version changes and proceed to step 3.

CustomerPortal Select Configurations

Welcome, Sondel
Current site mode: Production - Browser User Agent

Dashboard | Framework | Widgets | Logs | Settings | Deploy | View Site

Search widgets

Select Configurations

1. Select Files | 2. Version Changes | 3. Select Configurations | 4. Stage

Page set mapping differences between development and staging

Action: No action	Location	Regular Expression	Description	Page Set	Exists	Ena
	Development	[redacted]			yes	no
No action	Staging				no	N/A
	Development				yes	no
No action	Staging				no	N/A
	Development				yes	no
No action	Staging				no	N/A

Next > Confirm the selected configuration actions and proceed to Step 3.

Confirm the selected configuration actions and proceed to Step 3.

CustomerPortal Stage

Welcome, Sondel
Current site mode: Production - Browser User Agent

Dashboard | Framework ▼ | Widgets ▼ | Logs ▼ | Settings ▼ | Deploy ▼ | View Site ▼ | ?

Search widgets

Stage

1. Select Files | 2. Version Changes | 3. Select Configurations | **4. Stage**

Selected file actions

Action	Exists in development	Exists in staging	File name
Copy to staging	true	true	[redacted]

Selected page set mapping actions

There are no page set differences to display.

Selected Version Changes

There are no Framework or Widget version differences to push out.

Add a comment to store in the staging log file

Ticket # ------ November 1st

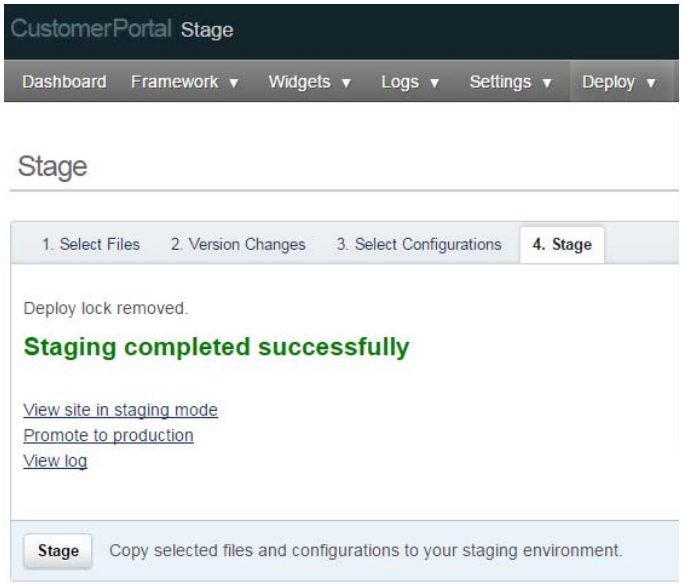
☐ Re-initialize your Staging environment

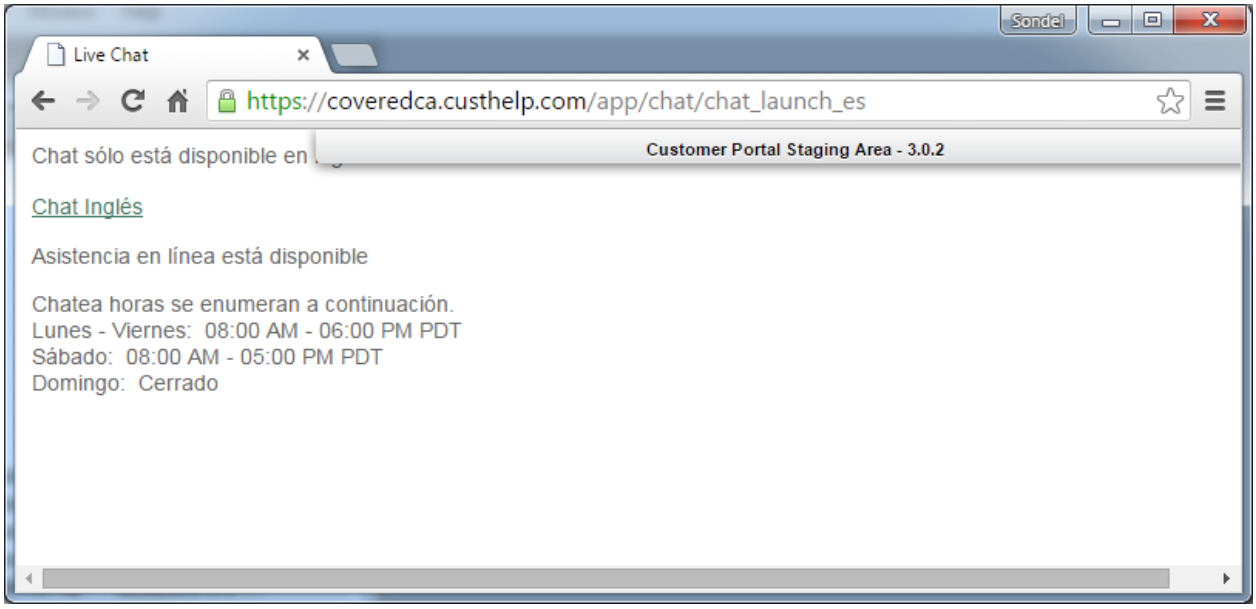
ALL files, configurations, and version changes will be removed and re-created from the Development environment

Stage Copy selected files and configurations to your staging environment.

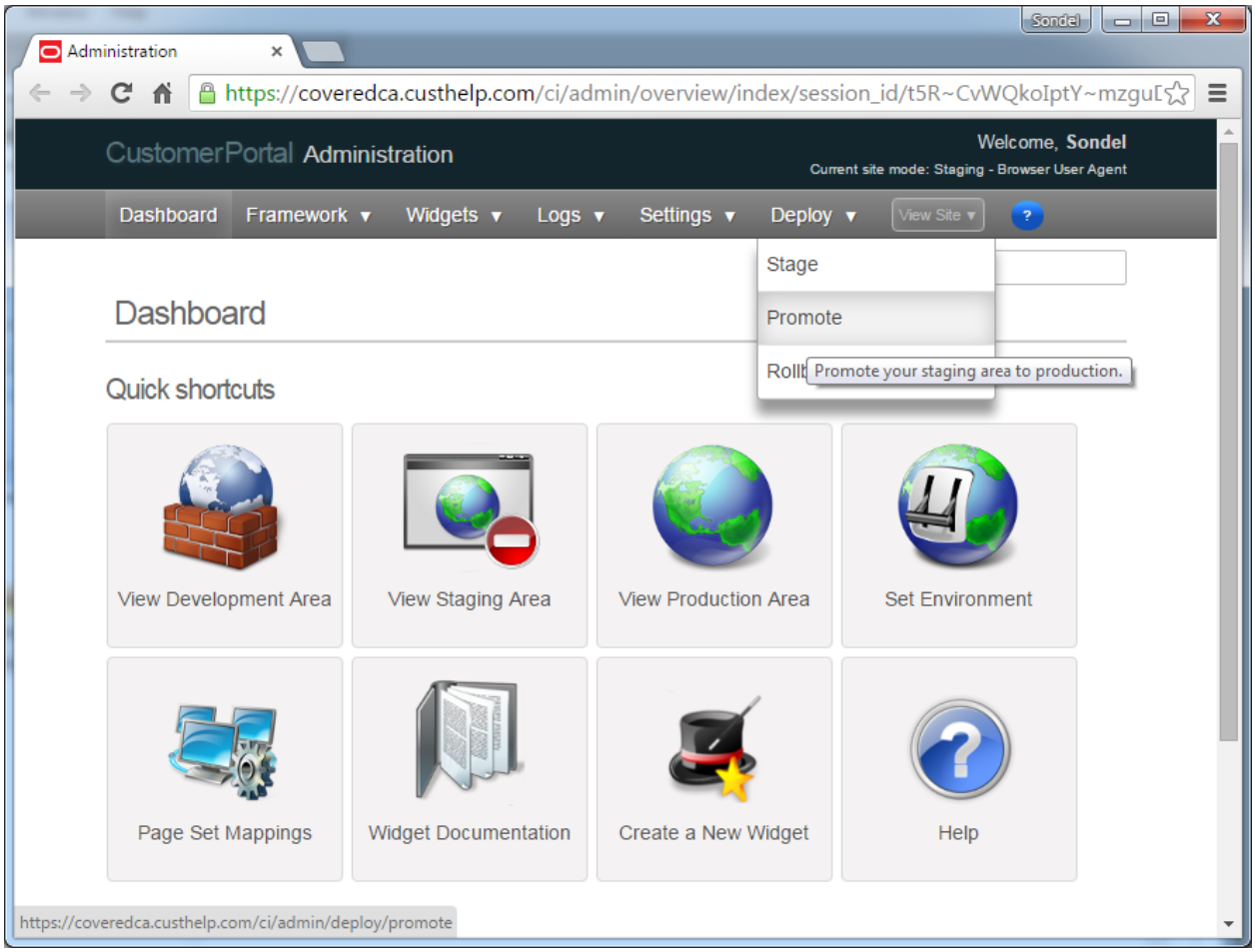
Copying selected items to staging and compiling pages.

Please wait ...


CustomerPortal Stage
Dashboard
Framework
Widgets
Logs
Settings
Deploy
Stage
1. Select Files
2. Version Changes
3. Select Configurations
4. Stage
Deploy lock removed.
Staging completed successfully
View site in staging mode
Promote to production
View log
Stage
Copy selected files and configurations to your staging environment.


Sondel
Live Chat
https://coveredca.custhelp.com/app/chat/chat_launch_es
Chat sólo está disponible en
Customer Portal Staging Area - 3.0.2
Chat Inglés
Asistencia en línea está disponible
Chatea horas se enumeran a continuación.
Lunes - Viernes: 08:00 AM - 06:00 PM PDT
Sábado: 08:00 AM - 05:00 PM PDT
Domingo: Cerrado

14.3 Promote to Production



Promote

https://coveredca.custhelp.com/ci/admin/deploy/promote

CustomerPortal Promote

Welcome, Sondel

Current site mode: Staging - Browser User Agent

Dashboard | Framework | Widgets | Logs | Settings | Deploy | View Site | ?

Search widgets

Promote

File differences between staging and production.

Exists in staging	Exists in production	File name
true	true	[redacted]
true	true	[redacted]

Widget version differences between staging and production

There are no Framework or Widget version differences to push out.

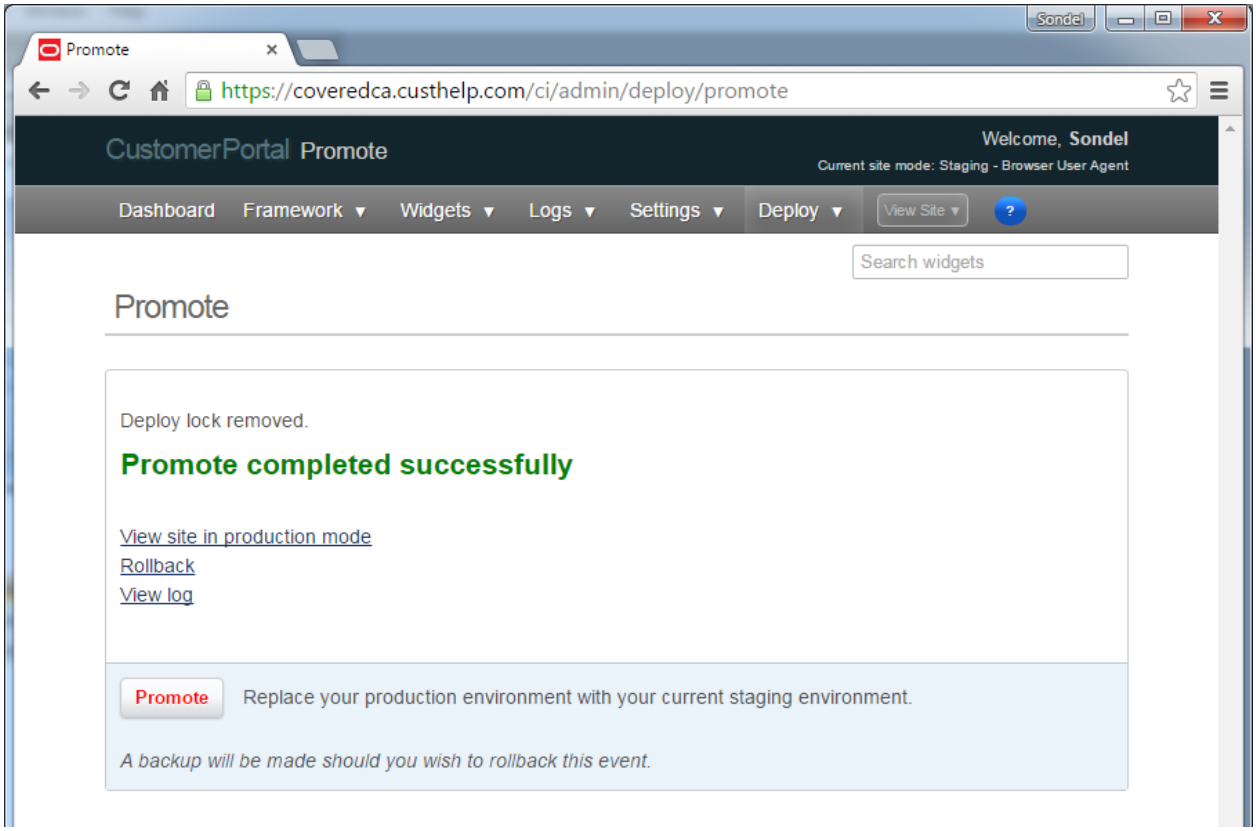
Add a comment to store in the promote log file

Promote — Replace your production environment with your current staging environment.

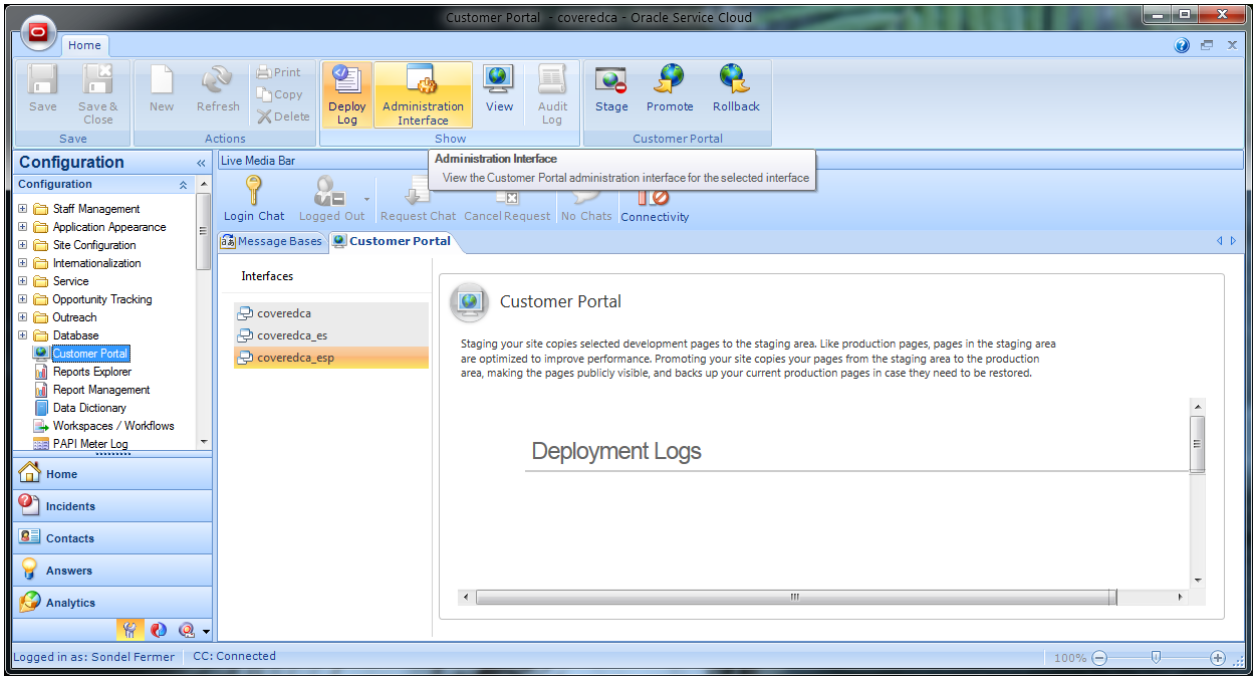
A backup will be made should you wish to rollback this event.

Promoting staging to production.

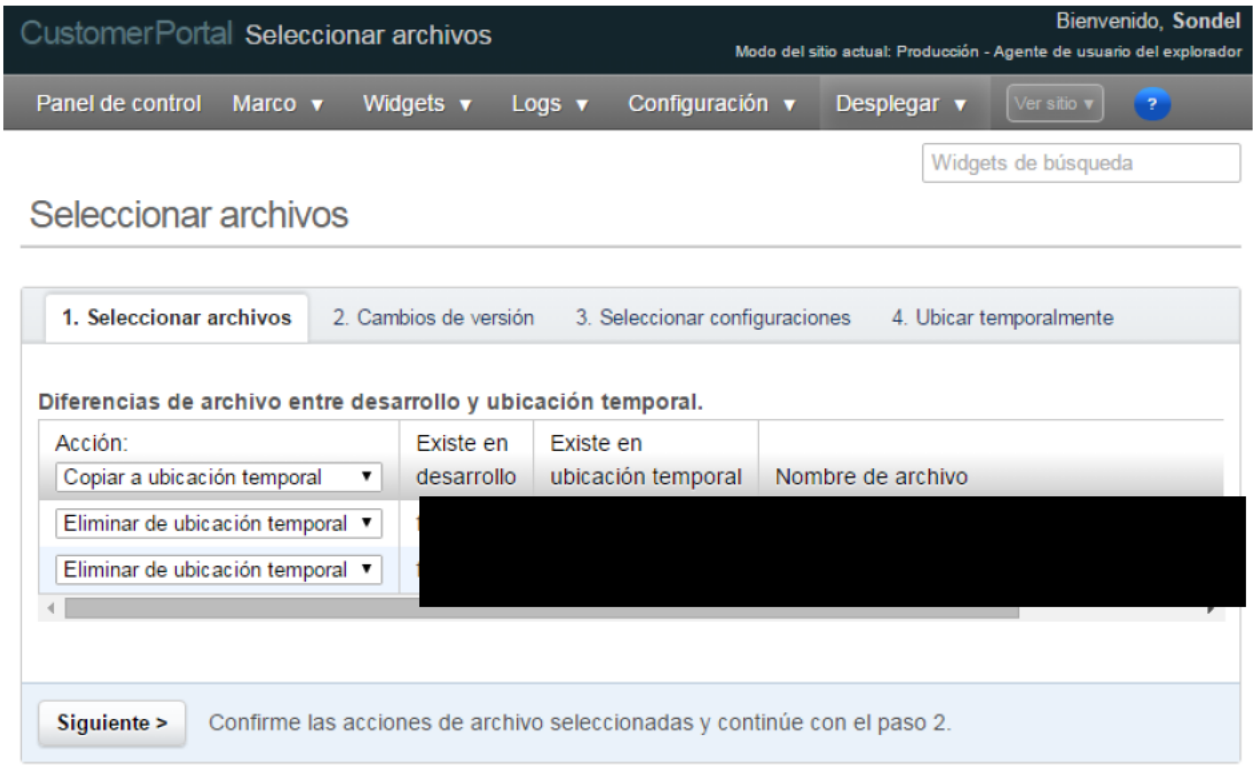
Please wait ...



Spanish interface – Staging



CustomerPortal Administración
Bienvenido, Sondel
Modo del sitio actual: Producción - Agente de usuario del explorador
Panel de control
Marco
Widgets
Logs
Configuración
Desplegar
Ver sitio
Etapa
Promocionar
Copiar archivos y configuraciones del área de
Revertir
Panel de control
Accesos directos rápidos
Ver área de desarrollo
Ver área temporal
Ver área de producción
Definir entorno
Asignaciones de juego de páginas
Documentación de widget
Crear widget nuevo
Ayuda


CustomerPortal Seleccionar archivos
Bienvenido, Sondel
Modo del sitio actual: Producción - Agente de usuario del explorador
Panel de control
Marco
Widgets
Logs
Configuración
Desplegar
Ver sitio
Widgets de búsqueda
Seleccionar archivos
1. Seleccionar archivos
2. Cambios de versión
3. Seleccionar configuraciones
4. Ubicar temporalmente
Diferencias de archivo entre desarrollo y ubicación temporal.
Acción:
Existe en desarrollo
Existe en ubicación temporal
Nombre de archivo
Copiar a ubicación temporal
Eliminar de ubicación temporal
Eliminar de ubicación temporal
[redacted]
Siguiente >
Confirme las acciones de archivo seleccionadas y continúe con el paso 2.

CustomerPortal Seleccionar actualizaciones de versión

Bienvenido, **Sondel**

Modo del sitio actual: Producción - Agente de usuario del explorador

Panel de control | Marco | Widgets | Logs | Configuración | Desplegar | Ver sitio | ?

Widgets de búsqueda

Seleccionar cambios de versión

1. Seleccionar archivos | **2. Cambios de versión** | 3. Seleccionar configuraciones | 4. Ubicar temporalmente

Cambios de marco

No hay diferencias de marco para mostrar.

Cambios de widget

No hay diferencias de widget para mostrar.

¿Desea insertar todos los cambios de versión de marco y widget?

No hay actualizaciones de versión para desplegar

Siguiente > Confirme los cambios de versión seleccionados y continúe con el paso 3.

CustomerPortal Seleccionar configuraciones

Bienvenido, **Sondel**

Modo del sitio actual: Producción - Agente de usuario del explorador

Panel de control | Marco | Widgets | Logs | Configuración | Desplegar | Ver sitio | ?

Widgets de búsqueda

Seleccionar configuraciones

1. Seleccionar archivos | 2. Cambios de versión | **3. Seleccionar configuraciones** | 4. Ubicar temporalmente

Diferencias de asignaciones de juego de páginas entre desarrollo y ubicación temporal

Acción: Ninguna acción	Ubicación	Expresión regular	Descripción	Juego de páginas	Existe	Activa
	Desarrollo	[redacted]				
Ninguna acción	Ubicación temporal					
	Desarrollo					
Ninguna acción	Ubicación temporal					
	Desarrollo					
Ninguna acción	Ubicación temporal					

Siguiente > Confirme las acciones de configuración seleccionadas y continúe con el paso 3.

CustomerPortal Etapa

Bienvenido, **Sondel**

Modo del sitio actual: Producción - Agente de usuario del explorador

Panel de control | Marco ▾ | Widgets ▾ | Logs ▾ | Configuración ▾ | Desplegar ▾ | Ver sitio ▾ | ? | Widgets de búsqueda

Etapa

1. Seleccionar archivos | 2. Cambios de versión | 3. Seleccionar configuraciones | **4. Ubicar temporalmente**

Acciones del archivo seleccionado

Acción	Existe en desarrollo	Existe en ubicación temporal	Nombre de archivo
Eliminar de ubicación temporal	false	true	generated/staging/source/views/pages/chat/chat_landing_es.php
Eliminar de ubicación temporal	false	true	generated/staging/source/views/pages/chat/chat_launch_es.php

Acciones de asignación de juego de páginas seleccionada

No hay diferencias de juego de páginas para mostrar.

Cambios de versión seleccionados

No hay diferencias de versión de marco o widget para enviar.

Agregue un comentario para almacenarlo en el archivo de log de ubicación temporal

☐ Reinicialice el entorno temporal

Todos los cambios de archivo, configuración y versión se eliminarán y se volverán a crear desde el entorno de desarrollo

Etapa Copiar seleccionados archivos y configuraciones al entorno temporal.

¿Desea continuar?

¿Continuar copiando seleccionados elementos a la ubicación temporal?

Etapa | Cancelar

Copiando seleccionados elementos a las páginas de compilación y ubicación temporal.

Espere...

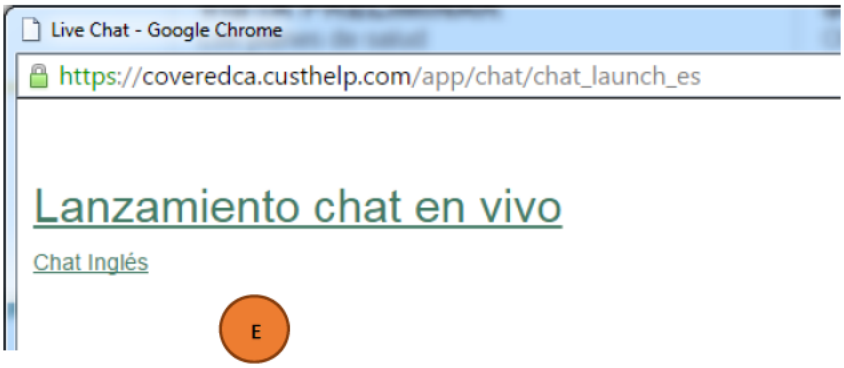
CustomerPortal Etapa
Bienvenido, Sondel
Modo del sitio actual: Producción - Agente de usuario del explorador
Panel de control
Marco
Widgets
Logs
Configuración
Desplegar
Ver sitio
?
Widgets de búsqueda
Etapa
1. Seleccionar archivos
2. Cambios de versión
3. Seleccionar configuraciones
4. Ubicar temporalmente
Se ha eliminado el bloqueo de despliegue.
Ubicación temporal finalizada correctamente
Ver sitio en modo de ubicación temporal
Promoción a producción
Ver log
Etapa
Copiar seleccionados archivos y configuraciones al entorno temporal.

15.0 Spanish Chat Interface

Content for the Spanish Chat interface is controlled via Message Bases and Interface configuration settings

Message bases are text strings that appear on the administration interface, the customer portal, and in email messages and notifications. By customizing message bases with the Message Bases editor, you can change the descriptive text within your application.

Each circled-letter in the images below has a corresponding letter pointing to the description or Key for the Message Base used for editing.



https://coveredca-esp.custhelp.com/app/chat/chat_launch

Covered ... | Chat ...

Contacte con un miembro de nuestro equipo de soporte técnico. F

Para proteger su información personal identificable/información de salud protegida, chat no puede ayudar con preguntas específicas [illegible]o. Por favor, no envíe ninguna información de identificación personal o información de salud protegida, tal como númer[illegible]eguro social, lugar de nacimiento, apellido de soltera, educación, transacciones financieras, información médica o de empleo. De tener preguntas específicas, comuníquese con el centro servicio de Covered California al 1-800-300-0213. G

4 **Seleccione un rol** * MERCADO INDIVIDUAL INDIVIDUAL H

5 **Nombre** *

Apellido * 6

7 **Dirección de correo electrónico** *

Vuelva a introducir Dirección de correo electrónico *

2 **Teléfono**

Entrada esperada: (###) ###-####

1 **Código postal** *

NO[illegible]IMPORTANTE: Chat sólo puede ayudar con el siguiente menú desplegable de opciones. Si usted necesita in[illegible]ión específica sobre su solicitud, favor de comunicarse con el centro de servicio de Covered California al 1-800-300-0213. I

Tema: Seleccione un 3 J

ENVIAR K

El soporte de chat está disponible L

Las horas de chat se muestran en una lista a continuación. B

Lunes - Viernes: 08:00 AM - 08:00 PM PST
Sábado: 08:00 AM - 06:00 PM PST C
Domingo: Cerrado
Actualmente es Lunes 02 de Noviembre de 2015 01:44 PM PST

100%

Configuration > Site Configuration > Message Bases

Key to image clips from Chat Interface:

A	SORRY_CHAT_UNAVAILABLE_MSG
B	CHAT_HOURS_ARE_LISTED_BELOW_MSG
C	Refer to the Configuration section of this Runbook for Chat Hours
E	Refer to the Customer Portal section
F	CHAT_MEMBER_OUR_SUPPORT_TEAM_LBL
G	CUSTOM_MSG_CONTACT_US_DISCLAIMER
H	Refer to… Products
I	CUSTOM_MSG_CHAT_IMPORTANT_NOTE
J	CUSTOM_MSG_CHAT_SELECT_TOPIC
J1	CUSTOM_MSG_CHAT_TOPIC_1
J2	CUSTOM_MSG_CHAT_TOPIC_2
J3	CUSTOM_MSG_CHAT_TOPIC_3
J4	CUSTOM_MSG_CHAT_TOPIC_4
K	SUBMIT_CMD
L	CHAT_AVAIL_MSG
1	CUSTOM_MSG_CHAT_ZIPCODE
2	CUSTOM_MSG_CHAT_PHONE
3	CUSTOM_MSG_CHAT_TOPIC
4	CUSTOM_MSG_CHAT_SELECT_ROLE
5	FIRST_NAME_LBL
6	LAST_NAME_LBL
7	EMAIL_ADDR_LBL
	CUSTOM_MSG_CHAT_SELECT_ROLE
	CUSTOM_MSG_CHAT_NO_ROLE_SELECTED
	CUSTOM_MSG_CHAT_NO_ROLE_SELECTED

16 Appendix

[redacted]

- [redacted]
- [redacted]
- [redacted]
- [redacted]
- [redacted]

- [redacted]

- [redacted]
- [redacted]
- [redacted]

[redacted]

- [redacted]
- [redacted]
- [redacted]

- [redacted]

[redacted]

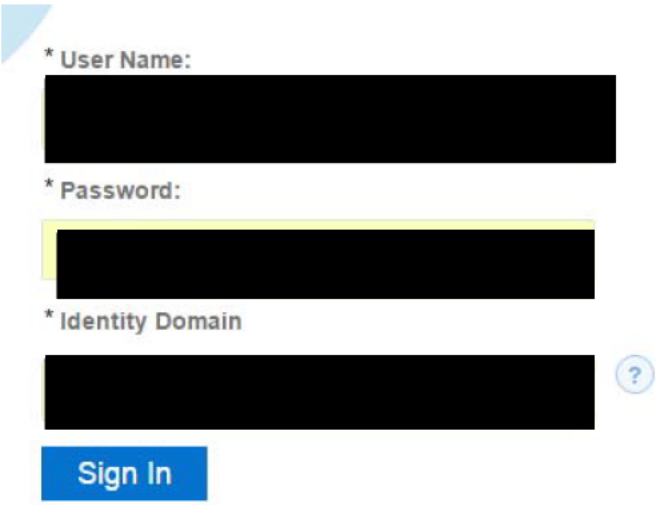
- [redacted]
- [redacted]
- [redacted]
- [redacted]
- [redacted]
- [redacted]
- [redacted]
- [redacted]
- [redacted]
- [redacted]
- [redacted]
- [redacted]
- [redacted]
- [redacted]
- [redacted]
- [redacted]
- [redacted]
- [redacted]
- [redacted]
- [redacted]

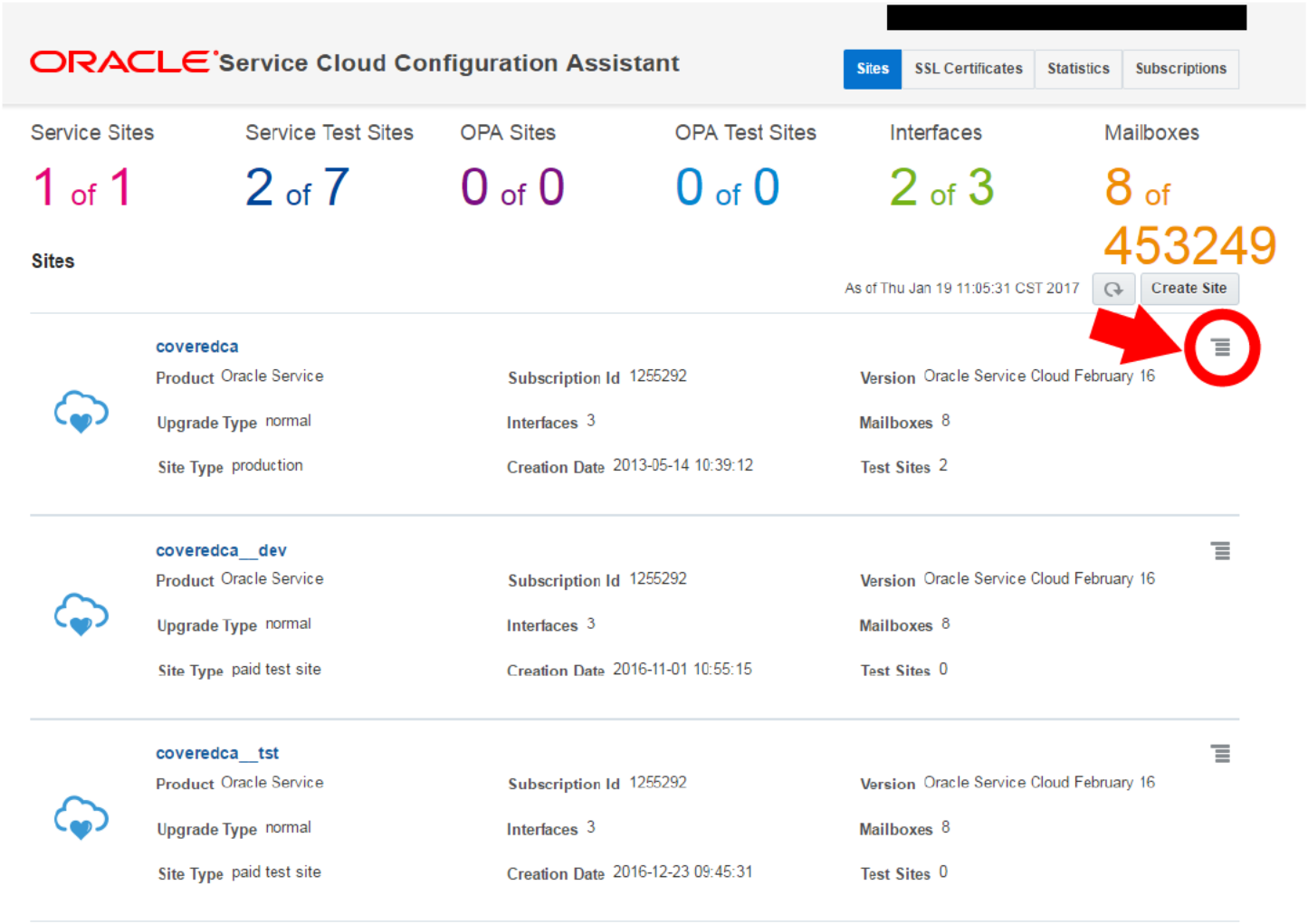
[redacted]

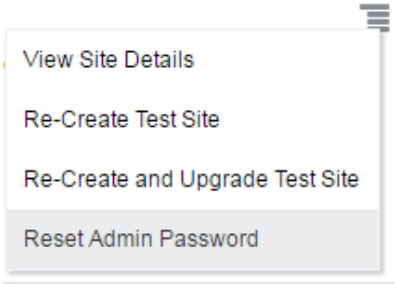
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	
[redacted]	

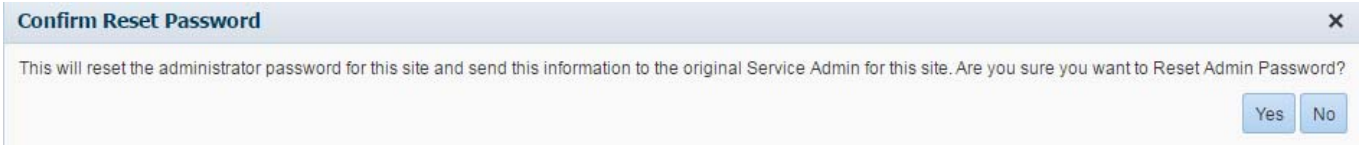
Service Cloud Configuration Assistant- Screen Samples:

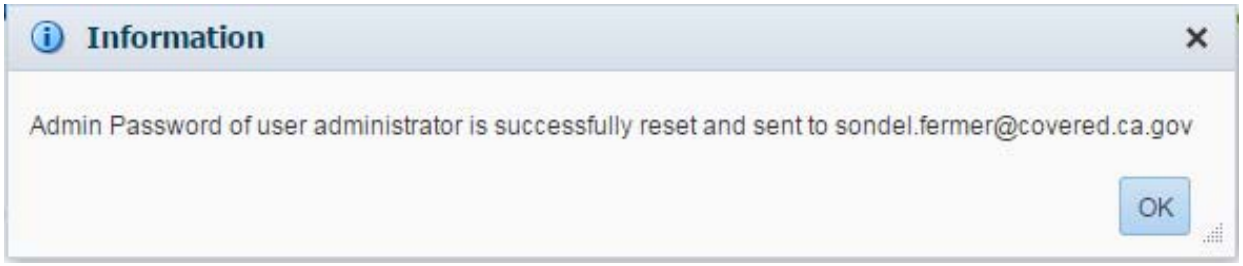
https://ossc-fg.custhelp.com/hmsadf/login.jsp






View Site Details
Re-Create Test Site
Re-Create and Upgrade Test Site
Reset Admin Password


Confirm Reset Password
This will reset the administrator password for this site and send this information to the original Service Admin for this site. Are you sure you want to Reset Admin Password?
Yes
No


Information
Admin Password of user administrator is successfully reset and sent to sondel.fermer@covered.ca.gov
OK

Covered CA – SCR
Incident Management
Oracle Service Cloud Solution Definition Document

April 23, 2015

Submitted To: Covered CA

Contents

1 INTRODUCTION 3
1.1 Purpose of Functional Solution Definition 3
1.2 Project Overview and Scope 3
2 REQUIREMENTS 3
2.1 Incident Management 3
2.1.1 Incident Management Process 3
2.1.2 Channels 7
2.1.3 Internal Escalation & Transfer 7
2.1.4 New Incident by SCR 7
2.1.5 Incident Queues 9
2.1.6 Incident Routing Rules 9
2.1.7 Incident Statuses 9
2.1.8 Standard Text 10
2.1.9 Response Requirements 10
Create Incident Workspace 10
2.2 Contact Management 22
2.2.1 Create Contact Workspace 22
2.3 Chat Management 30
2.3.1 Chat Service Hours 30
2.3.2 Chat Session Queues 31

2.3.3 Chat Agent Status 31
2.3.4 Chat Workspace 32
2.3.5 Chat Workspace Ribbon 32
2.3.6 Chat Session Alerts 33
2.3.7 Chat Wrap-up Time 33
2.3.8 Creating Incident from Chat Sessions 33
2.3.9 Preliminary Screen Pop 35
2.4 Chat Launch Page 36
2.4.1 Chat Launch Fields 38
2.5 Profiles 38
2.6 Staff Accounts 39
2.7 Reports & Dashboards 40
2.7.1 SCR-Manager Navigation Set 40
2.7.2 SCR-Supervisor Navigation Set 48
2.7.3 SCR & SCR Lead Navigation Set 55
2.7.4 SCR Chat – English & Spanish 57

1 INTRODUCTION

1.1 Purpose of Functional Solution Definition

The purpose of the Functional Solution Definition document is to define and illustrate the functional requirements that Covered CA – SCR Oracle Service Cloud or "CRM" should support. The document also serves as a reference and communication guide for the scope and direction of the implementation that [redacted] is completing for Covered CA – SCR CRM. The goal is for both Covered CA and [redacted] to review and gain agreement on how Administrators, Managers, SCRs, and contacts are going to use the Service Cloud application and to make sure the use cases and requirements are defined up-front so the application can be configured and tested properly.

1.2 Project Overview and Scope

Covered CA has purchased licenses and an Oracle Service Cloud site and interface with the service modules enabled. Covered CA has contracted [redacted] to complete a solution definition and solution development for implementation of Incident Management for their Oracle Service Cloud solution or "CRM." The following modules are in scope for implementation:

- Incident Management
- Chat Management
- Contact Management
- Service Analytics

2 REQUIREMENTS

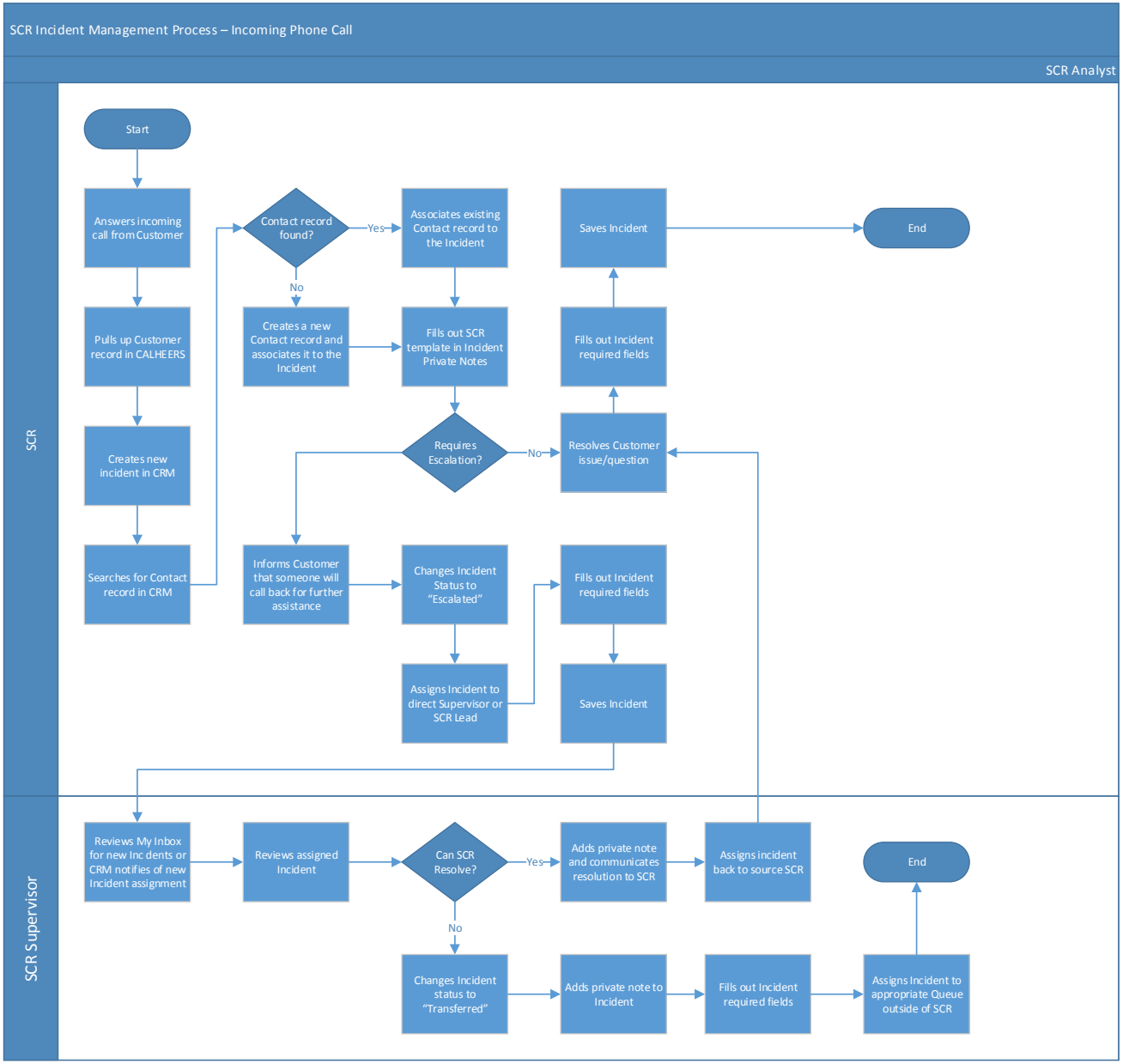
2.1 Incident Management

2.1.1.1 Incident Management Process

An Incident is any question or request for help submitted by a contact on any available channel. Covered CA – SCR will be tracking all incoming and outgoing customer phone communication, and incoming emails via incidents in Oracle Service Cloud (CRM). Covered CA – SCR will primarily create new incidents from incoming phone calls and handle "returned" incidents via the SCR queue from other internal groups. SCRs will be able to escalate incidents to the SCR Supervisor queue for further assistance and the SCR Supervisors will have the ability to transfer incidents to other internal teams via department-specific queues. Each incident will be associated to a unique reference number. Incident management

functions are dependent on how SCRs handle key incident details. Therefore, all incidents, when opened for editing or created, will start with a focus on the private note in the messages tab. The private note will be pre-populated with a standard template that will be provided and maintained by Covered CA. SCR will conduct research according to defined business processes and enter a private note in the messages tab. When the SCR is satisfied with his response he will close the incident and communicate the resolution back to the primary contact using the desired communication method. When an incident is transferred or “returned” to the SCR Queue then a SCR Supervisor may resolve the issue or manually assign it to a SCR for work. The assigned user will then see the new incident appear in their “My Inbox” view. For other cases, if the Supervisor determines that the incident should not have been transferred to SCR then the Supervisor will reassign the incident back to the supervisor of the source queue. SCRs will be unable to change the incident status if it is not assigned to the SCR Queue or the SCR user. Incidents will also be created to track incoming chat session transcripts but will automatically be set to a status of Closed.

2.1.1.2 Use Case 1 – SCR (Incoming Phone Call)


SCR Incident Management Process – Incoming Phone Call
SCR Analyst
SCR
SCR Supervisor
Start
Answers incoming call from Customer
Pulls up Customer record in CALHEERS
Creates new incident in CRM
Searches for Contact record in CRM
Contact record found?
Yes
No
Associates existing Contact record to the Incident
Creates a new Contact record and associates it to the Incident
Fills out SCR template in Incident Private Notes
Requires Escalation?
No
Resolves Customer issue/question
Fills out Incident required fields
Saves Incident
End
Informs Customer that someone will call back for further assistance
Changes Incident Status to "Escalated"
Assigns Incident to direct Supervisor or SCR Lead
Fills out Incident required fields
Saves Incident
Reviews My Inbox for new Inc dents or CRM notifies of new Incident assignment
Reviews assigned Incident
Can SCR Resolve?
Yes
No
Adds private note and communicates resolution to SCR
Assigns incident back to source SCR
Changes Incident status to "Transferred"
Adds private note to Incident
Fills out Incident required fields
Assigns Incident to appropriate Queue outside of SCR
End

2.1.2 Channels

SCR will handle incidents via the following channels:

- Phone (Incoming/Outgoing)
- Chat

2.1.3 Internal Escalation & Transfer

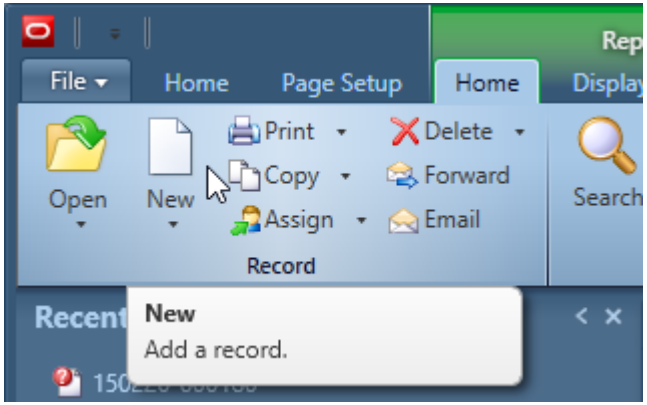
At times Incidents will need to be escalated to Supervisors for further support or to be transferred to the appropriate department. SCR and SCR Leads will be able to Escalate Incidents directly to an SCR Supervisor. The Supervisor will then have the options of Escalating the Incident to the appropriate department outside of General SCRs.

From	To
SCR Supervisor	- SCR - SCR Lead - CRT - OCP - E+E Appeals - External Coordination - Hotline - BO T1 Research (stand-in for R&R Appeals)
SCR or SCR Lead	SCR Supervisor

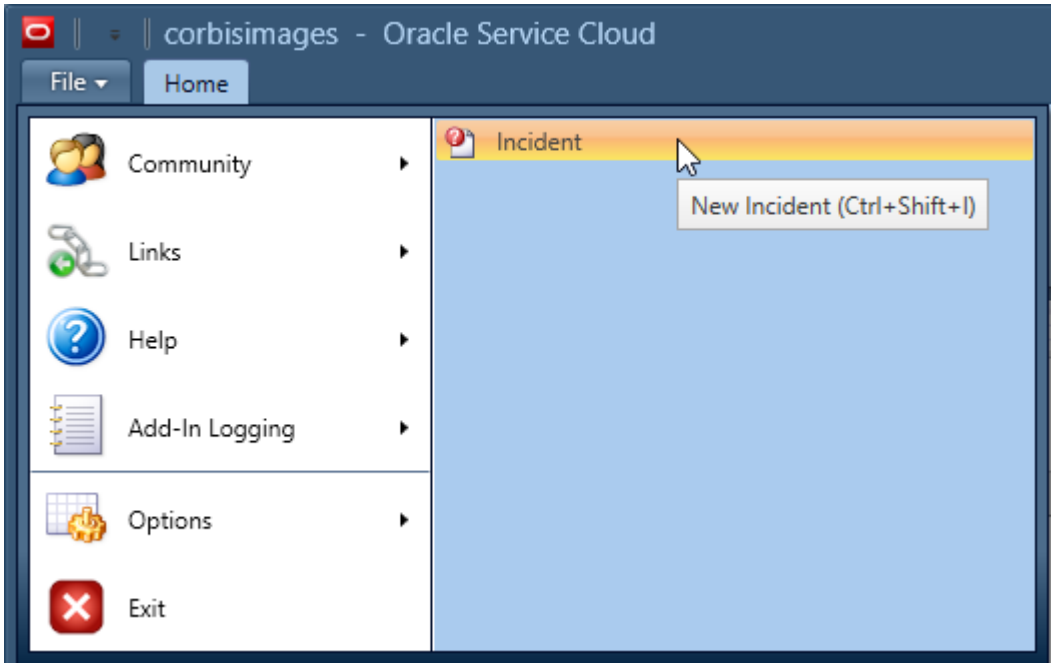
2.1.4 New Incident by SCR

At times, the SCR Team will need to create new incidents. New incidents will be created from either

1. The SCR My Inbox view by using the "New" button located in the ribbon bar:



2. Or the File Menu



2.1.5 Incident Queues

A sequence of unassigned, unresolved incidents. When an incident queue is added, it can be defined as the default queue. Incidents are added to queues automatically by business rules or manually by re-queuing and are handled in a first-in, first-out manner.

Queue Name
SCR
SCR Lead
SCR Supervisor

2.1.6 Incident Routing Rules

No auto-routing rules will be configured. SCR Supervisors will manually assign existing incidents to the SCRs or SCR Leads.

2.1.7 Incident Statuses

The status of an incident as it moves through the system. Below are the statuses that Covered CA – SCR will utilize for tracking purposes.

Statuses	Status Definition	Profile/Role
Closed	Solved	SCR, SCR Lead, SCR Supervisor, SCR Manager
Open	Unresolved	SCR, SCR Lead, SCR Supervisor, SCR Manager
Updated	Unresolved (This status is automatically selected when an incident has been updated by the contact via an email reply). Does not apply for phase 1 or until SCR begins using email communication from CRM. This will be hidden from view unless incident source = Email.	SCR, SCR Lead, SCR Supervisor, SCR Manager
Hotline – In Progress	Open (Incident in-progress)	SCR Supervisor, SCR Manager
Escalated	Incident escalated to Supervisor	SCR, SCR Lead, SCR Supervisor, SCR Manager
Transferred	Incident transferred outside of SCR queue	SCR Supervisor, SCR Manager

2.1.8 Standard Text

Text prepared in advance that can be sent to contacts when responding to incidents, appended to responses by a business rule, or sent by an SCR during a chat session. Covered CA – SCR will have access to the following standard text as a default template. The template below will be appended to the Messages tab as a new Private Note each time a SCR user opens an incident.

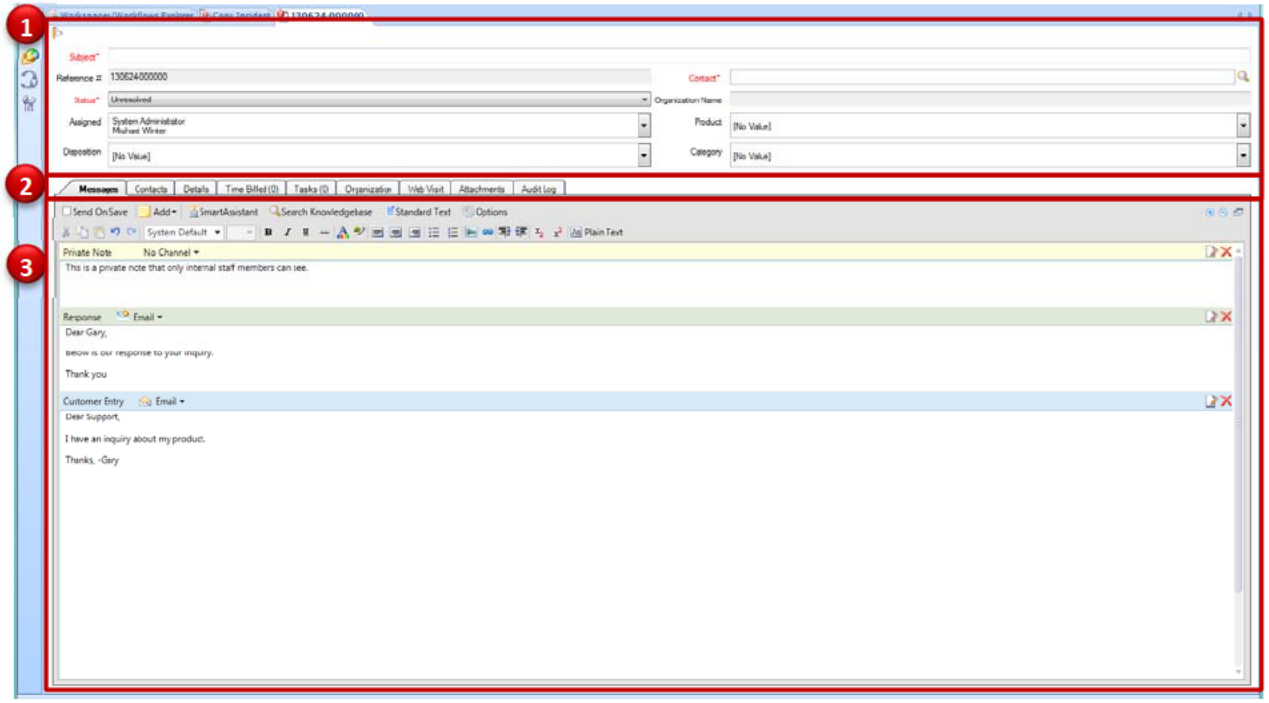
Name	Text
SCR Incident Note Template	1. Summary of Issue: 2. Action Taken: 3. Previous Applicable Incidents:

2.1.9 Response Requirements

The response requirements are used to measure SCR performance in responding to and solving incidents and can also be used for SLAs that do not have customized response requirements. Covered CA – SCR incidents must be addressed within 8 business hours of assignment. This only applies to incidents that have been directly assigned to the SCR or Lead from a Supervisor. If threshold is exceeded then incident will change to red within the Supervisor dashboard and SCR My Inbox view.

Create Incident Workspace

Workspace screens define the fields and layout that staff use when adding or editing records. The sections below define the incident workspace requirements. Below is a sample illustration of an incident workspace.



1. The top half of the workspace is commonly referred to as the summary or header section of the workspace. This is where staff members typically capture/review summary level information about the incident.
2. The bottom half is where tabs are located, which contain additional information about the Incident record.
3. The Messages tab contains the message thread, where all correspondence between the contact and staff is tracked. Staff will send and receive emails directly from the Messages tab on the incident workspace.

2.1.9.1 Incident Workspace Summary Level

The table below defines the fields on the incident workspace summary level. All the fields below will be read-only when an incident is opened and call type is equal to Appeal.

Label	Description	Details	CRM Field	Behavior
Subject	Incident Subject	Text Field	Incident.subject	Required

Label	Description	Details	CRM Field	Behavior
Incident Ref #	Unique Incident Reference Key	Text Field	Incident.ref	Read-Only

Type	SCR Call Type	• Menu o Access to Care ▪ Non Urgent ▪ Urgent • Life Threatening Condition • Life Sustaining Prescription • Urgent Medical Treatment o New Enrollment ▪ Completed Open Enrollment ▪ Completed Special enrollment ▪ APTC/Carrier Inquiry ▪ Inquiry/Assistance ▪ Incomplete Enrollment • Pending Consumer Info • System Issue o Medi-Cal ▪ Quicksort/New Medi-Cal Eligibility ▪ Provided county contact/number info ▪ Medi-Cal/Enrollment Inquiries o Current Customer ▪ Application/Case Status • Inquiry Assistance ▪ Report A Change • Name/DOB/SSN change or correction • Adding baby or adoption • Address change • Income Change • Adjusting APTC • Change to MEC • Household size	Incident.CatID	Most bottom level is always required

		• Unable to complete due to System Issue ▪ 1095-a • Inquiry/Assistance • Dispute Received ▪ Consumers Online Account • Requesting password reset/unlock • Requesting access code • Blocked account • Unable to complete due to system issue ▪ Payment Inquiry • Inquiry/Assistance ▪ Renewal • Complete enrollment • Inquiry/assistance • Pending Customer Info • Unable to complete due to system issue ▪ Disenrollment/Termination • Requesting to be terminated • Inquiry/Assistance • Unable to complete due to system issue o Appeals/Complaints/Fraud ▪ Appeals • Request an appeal • Status of appeal • Inquiry/Assistance ▪ Complaints • Inquiry Assistance ▪ Consumer Protection/Fraud		

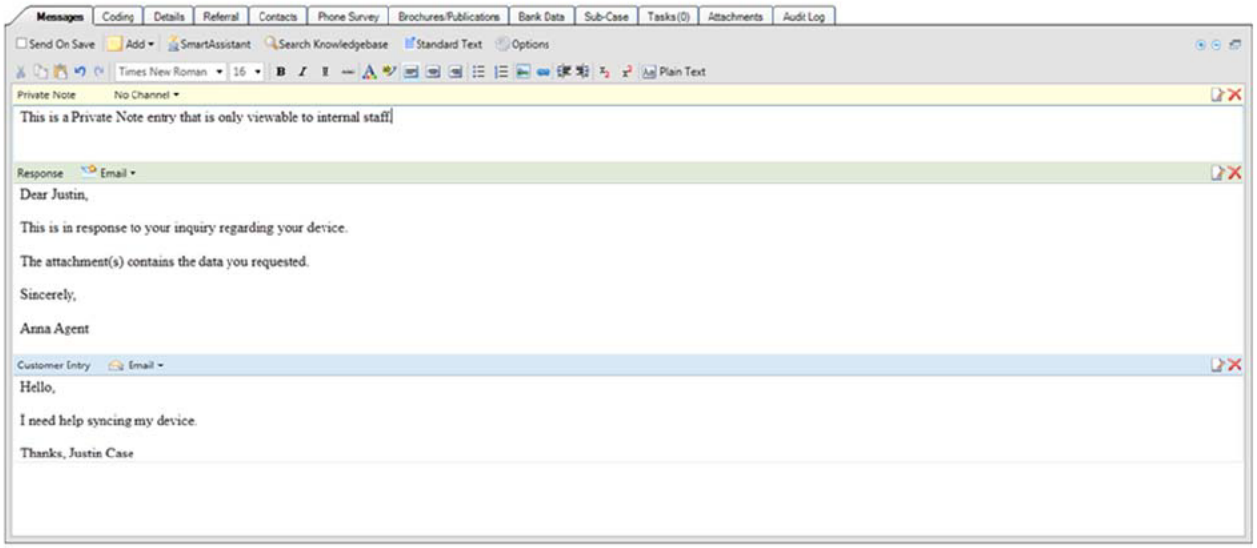
Label	Description	Details	CRM Field	Behavior
		• Potential Fraud Issue • Potential Identity Theft • Inquiry/Assistance ○ Supported Enrollment Entity ▪ Agent/CIA ▪ CEC (Certified Enrollment Counselor) ▪ PBE (Plan Based Enroller) ▪ Broker		
Status	Current incident status	• Menu ○ Open ○ Escalate ○ Closed ○ Transfer ○ Hotline – In Progress	Incident.status	- Required - Only Supervisors can Transfer
Special Projects Callback	Date for Contact follow-up	Date/Time Field	Incident.c$special_proj_follow_up_date	Optional
Contact	Primary Contact record associated to the incident	Lookup	Incident.c_id	Required
Case ID	This is the CalHEERS assigned number associated with the Contact.	Text Area	Contacts.HBX_CaseID (SSO$HBX_CaseID	Read-Only

Label	Description	Details	CRM Field	Behavior
CalHEERS Ticket#	When you encounter a CalHEERS issue when attempting to complete the documented process (RAC, Term, Term/re-enroll, reinstate, etc.), you need to submit a CalHEERS ticket.	Text Field	Incident.c$ch_ticket_no	Optional
Ticket Submitted Date	Enter the date you submitted the CalHEERS ticket	Date Field	Incident.c$ ch_ticket_sub_date	Optional
Ticket Closed Date	Enter the date the CalHEERS ticket was closed	Date Field	Incident.c$ ch_ticket_closed	Optional
Assigned	The name of the SCR working the incident	Menu (OOTB Assigned field)	Incident.assigned	- Optional - Incident remains assigned to self-assigned SCR until manually changes by another SCR

Label	Description	Details	CRM Field	Behavior
Queue	Incident Queue	• Menu ○ SCR ○ SCR Lead ○ SCR Supervisor	Incident.queue	• Required • Incoming Emails will all be assigned to the SCR Supervisor Queue • All newly created incidents will be assigned to the queue of the person creating the incident • Hide SCR Lead Queue for phase I
Phone Number	Contact Phone Number	Contact record's home/primary phone number	Contact.ph_home	Required
Carrier	Contact's Health Plan	Menu	Contact.c$carrier	Optional
Date Escalated to SCR	Date in which an incident entered to SCR Queue	Date/Time Field	Incident.c$SCR_date_created	Read-Only
Date Resolved	Date SCR resolved issue – Workspace rule will set this field automatically.	Date/Time Field	Incident.c$SCR_date_resolved	Read-Only
Application ID	Contact record's Application ID			Read-Only

2.1.9.2 Incident Workspace Messages Tab

The messages tab contains functionality that enables staff members to document details about the incident, send an email response to the contact related to the incident, or add a private note for internal use only. The image below is a sample illustration of the messages tab.

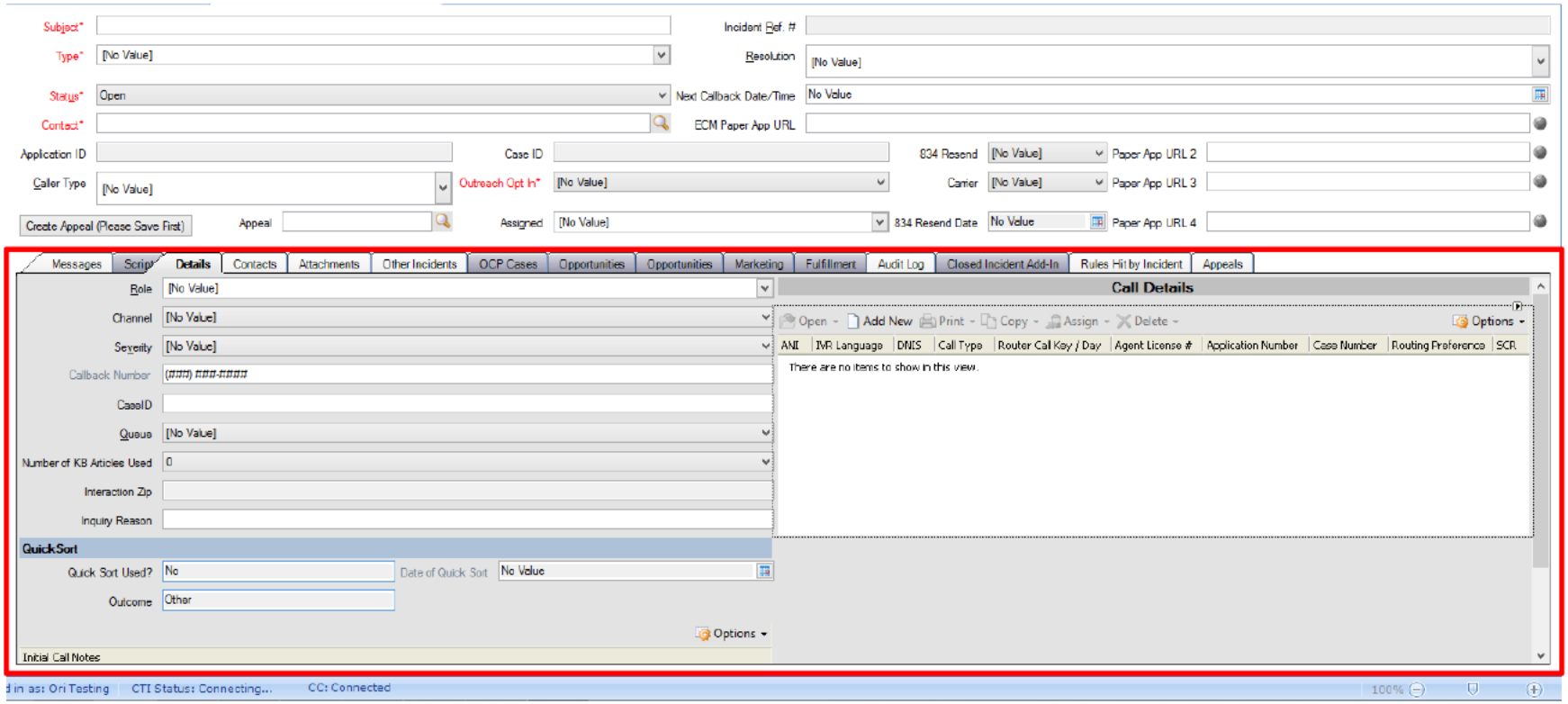


The following standard text will be inserted as a private note every time a SCR member opens an incident:

Name	Text
SCR Incident Note Template	1. Summary of Issue: 2. Action Taken 3. Previous Applicable Incidents

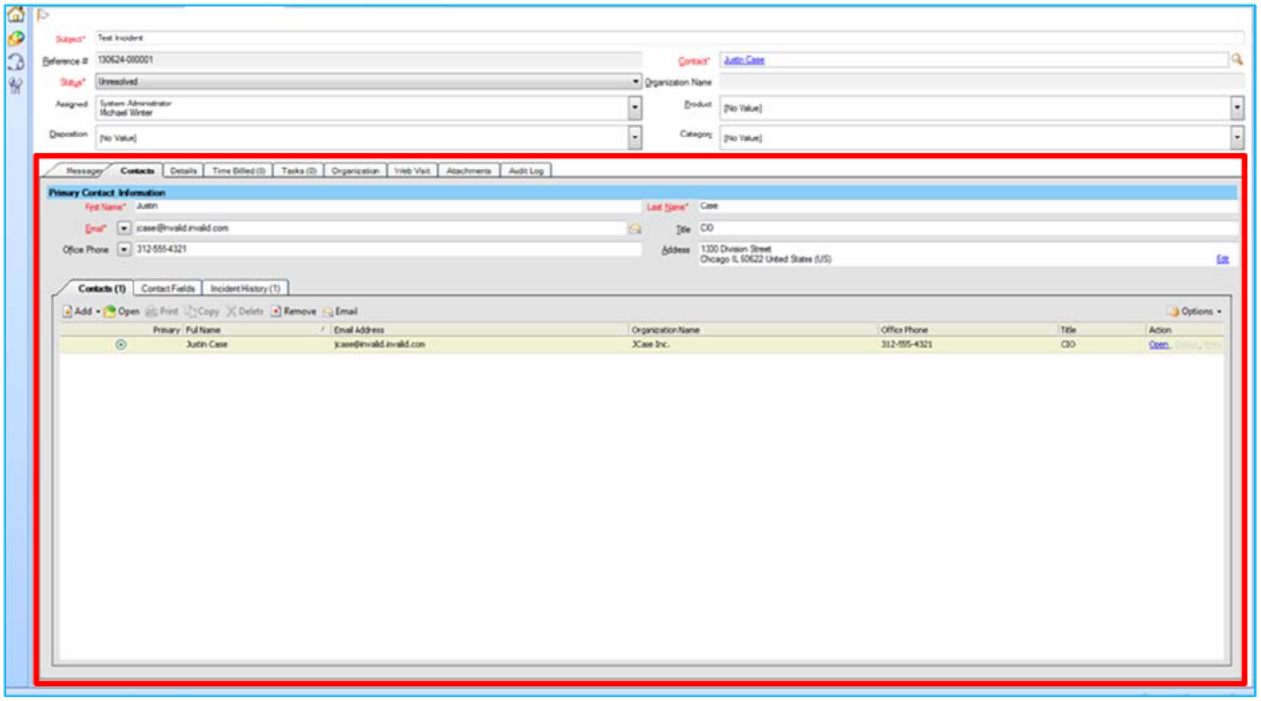
2.1.9.3 Incident Workspace Details Tab

Below is a sample illustration of the incident workspace contacts tab. This tab is where staff members can view detailed information about the Incident.



2.1.9.4 Incident Workspace Contacts Tab

Below is a sample illustration of the incident workspace contacts tab. This tab is where staff members can view detailed information about the primary contact, as well as any other contacts associated with the incident.



The table below defines the fields on the incident workspace contacts tab.

Label	Notes	Behavior
First Name	The first name of the primary contact on the incident	Optional
Last Name	The last name of the primary contact on the incident	Optional
Email Address	The email address for the contact	Optional
Phone Numbers	All Phone numbers	Optional
County	The contact's county	Optional
Date Created	Date the contact record was created in CRM	Optional
Preferred Language	Contact's preferred language	Optional

2.1.9.5 Incident Workspace Attachments Tab

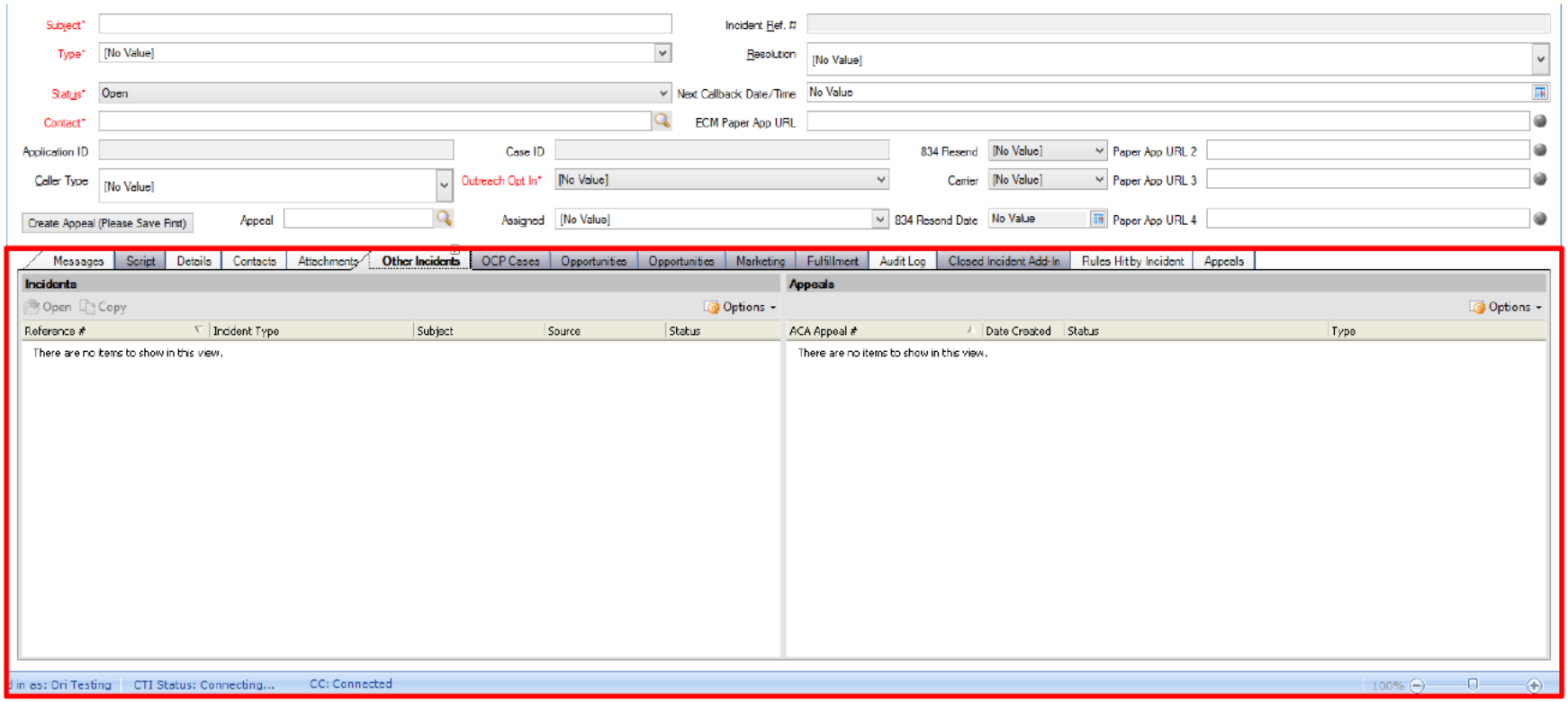
Enables staff members to attach files to the incident. All out of the box functionality will remain for this incident workspace tab.

2.1.9.6 Incident Workspace Audit Log Tab

Displays the history of transactions that have taken place on the incident record. All out of the box functionality will remain for this incident workspace tab.

2.1.9.7 Incident Workspace Other Incidents Tab

Displays the history of incidents related to the primary contact record in the incident. Also displays a list of Appeals by their ID only. No additional Appeal information is displayed.

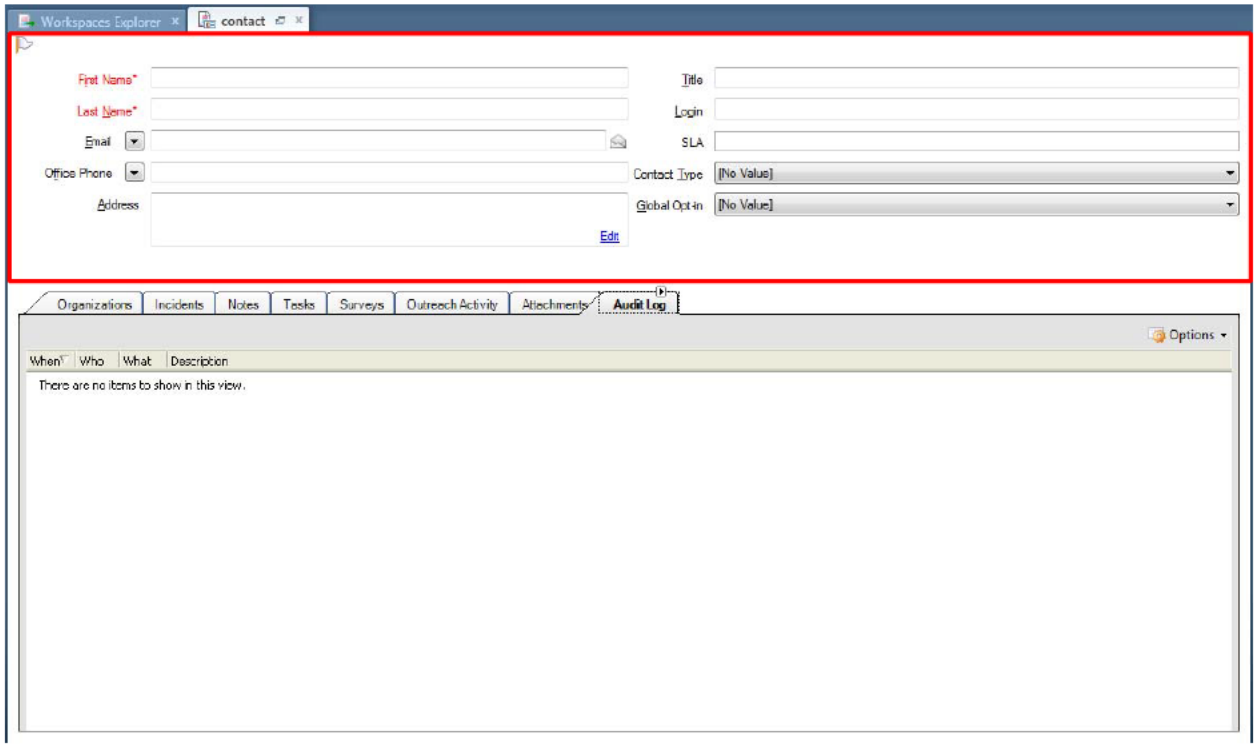


2.2 Contact Management

A contact is any individual with a contact record in the database. Contact records can be added by staff members on the Service Console or automatically by the system when contacts submit an incoming email or Incident from the web.

2.2.1 Create Contact Workspace

Workspace screens define the fields and layout that staff use when adding or editing records. The sections below define the contact workspace requirements. Below is a sample illustration of a contact workspace and does not represent the to-be configured solution.



2.2.1.1 Contact Workspace Summary Level

The following fields will be configured in the summary level of the incident workspace.

Label	Notes	Details	Behavior

Role	Contact's Role	o Individual Marketplace ▪ Individual ▪ Health Plan ▪ Agent ▪ Authorized Rep ▪ User Account ▪ Primary Contact o SHOP Marketplace ▪ Employee ▪ Employer ▪ Agent ▪ General Agent ▪ Dependents ▪ COBRA o CEC Program ▪ Grantee ▪ Entity/Enrollment Entity ▪ Enrollment Counselor o Other ▪ Other	Required
Email	Contact's Email Address	Text	Optional
First Name	Contact's First Name	Text	Required
Last Name	Contact's Last Name	Text	Required
Middle Name	Contact's Middle Name	Text	Optional
Address	Contact's Address	Text	Optional
County	Contact's County	Menu o Alameda o Alpine o Amador	Optional

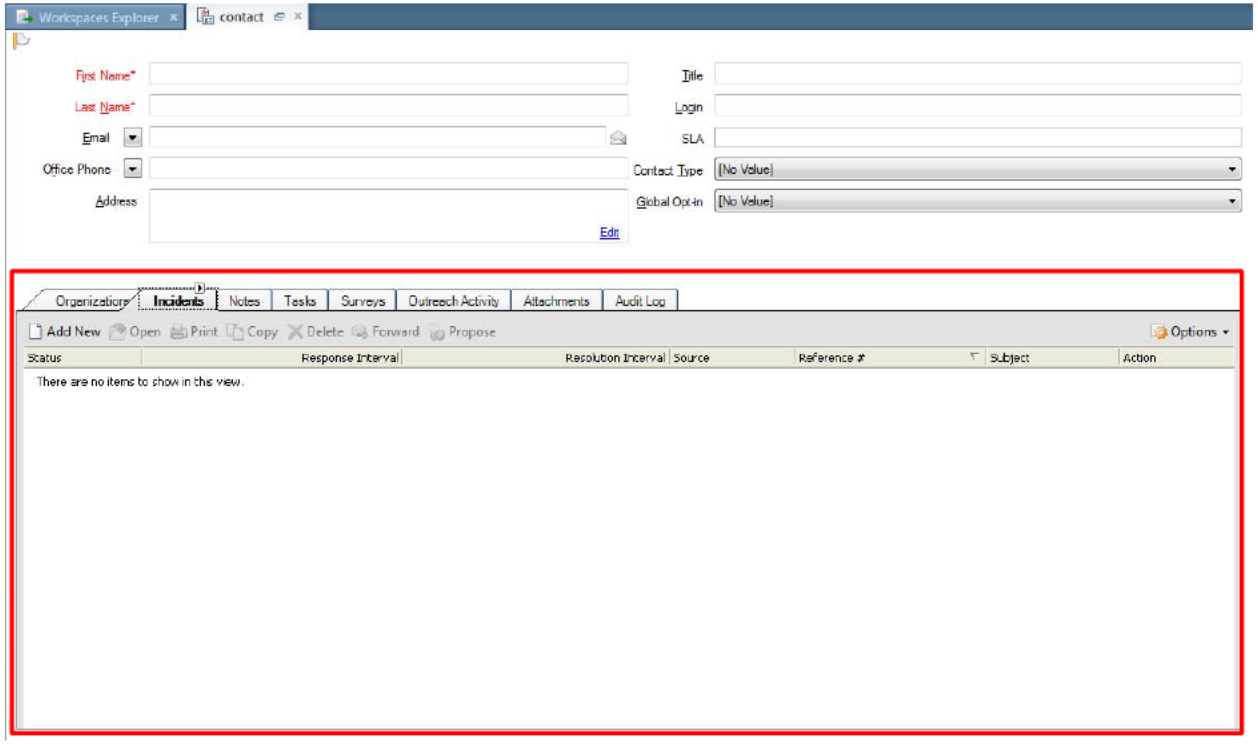
		o Butte o Calaveras o Colusa o Contra Costa o Del Norte o El Dorado o Fresno o Glenn o Humboldt o Imperial o Inyo o Kern o Kings o Lake o Lassen o Los Angeles o Madera o Marin o Mariposa o Mendocino o Merced o Modoc o Mono o Monterey o Napa o Nevada o Orange o Placer o Plumas o Riverside o Sacramento o San Benito o San Bernardino o San Diego	

		o San Francisco o San Joaquin o San Luis Obispo o San Mateo o Santa Barbara o Santa Clara o Santa Cruz o Shasta o Sierra o Siskiyou o Solano o Sonoma o Stanislaus o Sutter o Tehama o Trinity o Tulare o Tuolumne o Ventura o Yolo o Yuba o No County Provided	
DoB	Contact's Date of Birth	Text	Optional
Case ID	Contact's Case ID	Text	Read-Only
Application ID	Contact's Application ID	Text	Read-Only
SSN Last 4	Contact's Last 4 of Social Security Number	Text	Optional
Outreach Opt-In	For Marketing Purposes	Yes/No	- Read Only - Defaults to YES
Global Opt-In	Global Outreach Opt-In Preference	Yes/No	- Optional - Default to YES Value
Language	Contact's preferred language	Menu o English	- Required

		o Spanish o Arabic o Armenian o Cambodian o Cantonese o Mandarin o Farsi o Hmong o Korean o Lao o Russian o Tagalog o Vietnamese o Traditional Chinese character o Other	

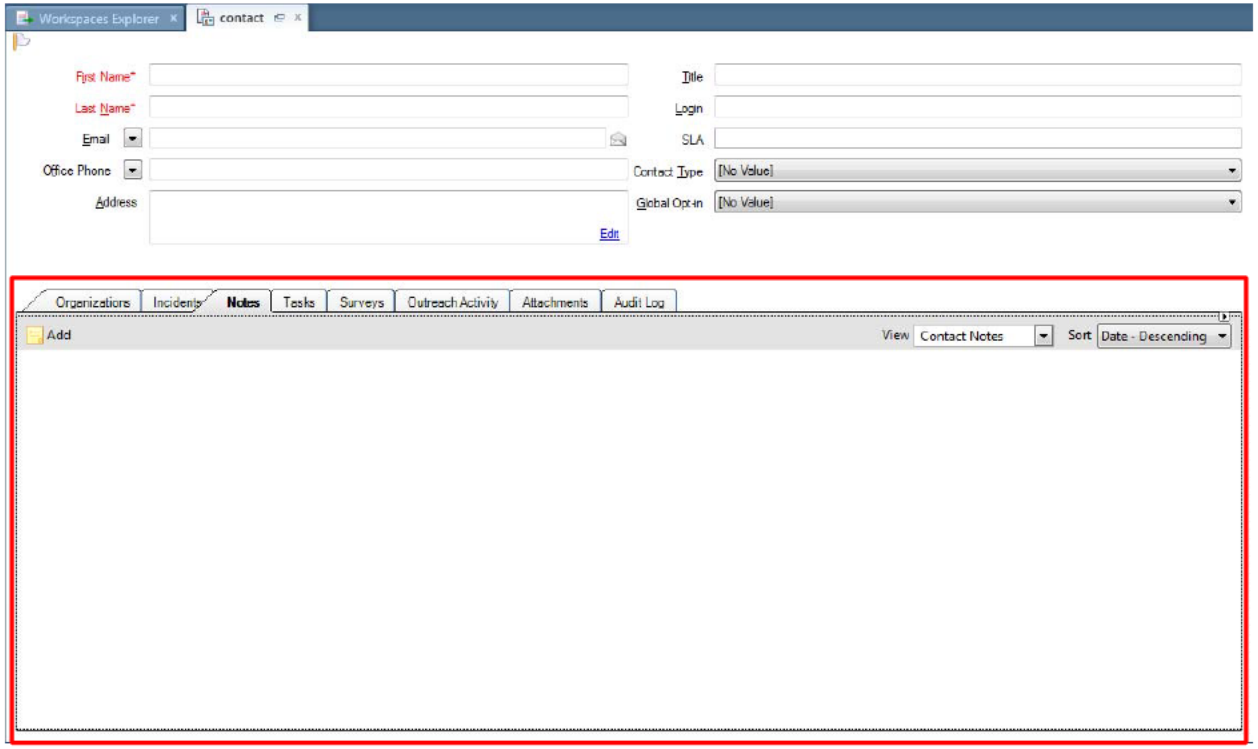
2.2.1.2 Contact Workspace Incidents Tab

Provides a detailed list of the contact's incident history by listing all incidents associated with the contact. This tab will be modified so that it displays incidents for contacts who are associated to an incident but are not the primary contact of the incident.



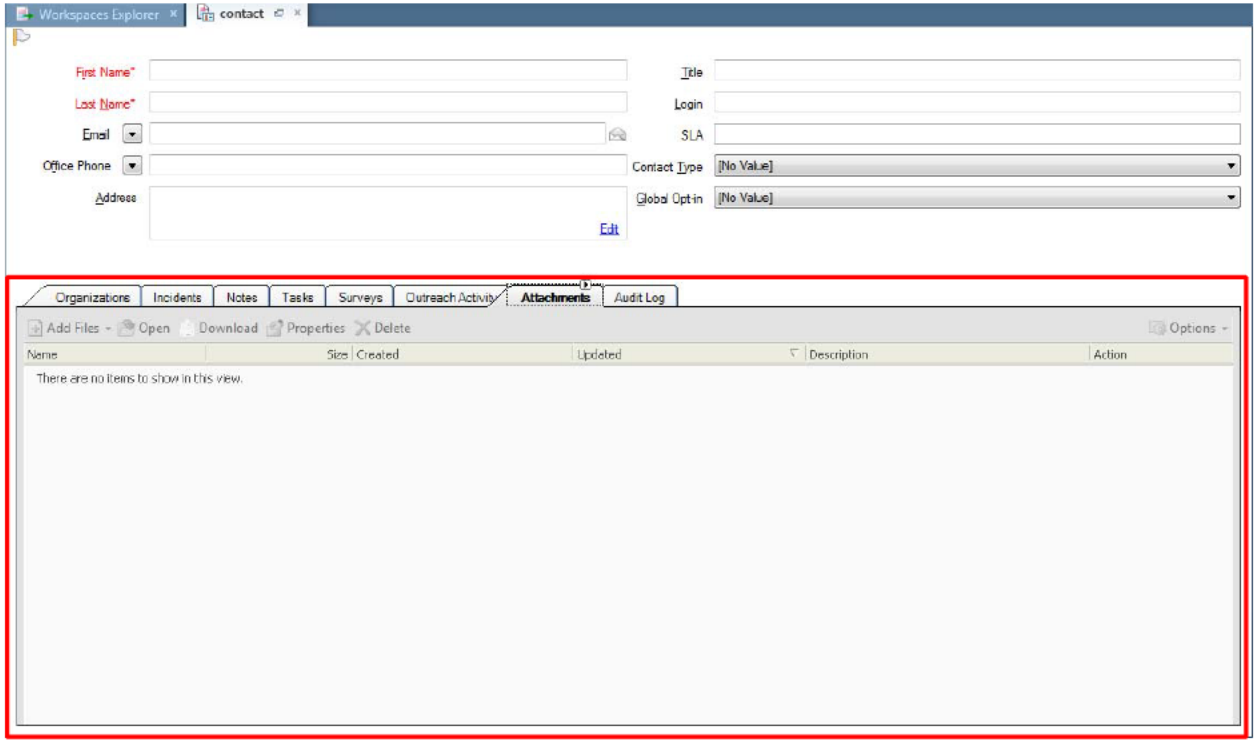
2.2.1.3 Contact Workspace Notes Tab

Enables staff members to create notes. All out of the box functionality will remain for this contact workspace tab.



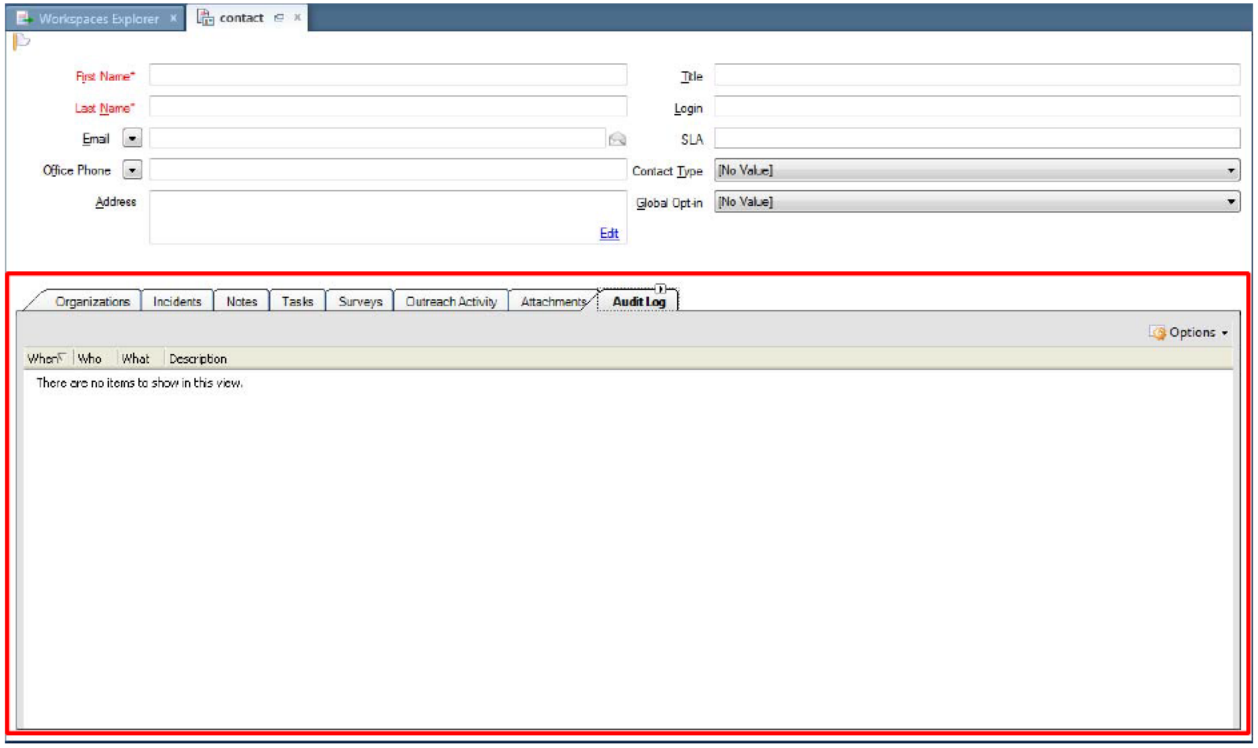
2.2.1.4 Contact Workspace Attachments Tab

Enables staff members to attach files to the contact record. All out of the box functionality will remain for this contact workspace tab.



2.2.1.5 Contact Workspace Audit Log Tab

Displays the history of transactions that have taken place on the contact record. All out of the box functionality will remain for this contact workspace tab.



2.3 Chat Management

2.3.1 Chat Service Hours

You can set chat hours for Service Cloud Chat availability to control when end-users can submit chat requests. Outside of those chat hours, end-users cannot request assistance. Additionally, your chat hours are displayed on the Chat Launch page. Chat hours will be defined as the earliest and the latest hours that agents will be available. If the customer requests a chat outside of the hours listed on the Chat Form, and an agent is not available, they will not be able to start a chat. All times below are in PST.

Chat Hours	Start		End	
Day	Hour	Minute	Hour	Minute
Monday	8	00	18	00

Tuesday	8	00	18	00
Wednesday	8	00	18	00
Thursday	8	00	18	00
Friday	8	00	18	00
Saturday	8	00	17	00

2.3.2 Chat Session Queues

When used with profiles and business rules, chat session queues enable automatic sorting of incoming chats based on contact, organization, product, category, and custom field information.

The following chat queues will be created:

Chat Queues
SCR English
SCR Spanish

2.3.3 Chat Agent Status

An agent's status describes his or her availability to chat with customers as well as assist supervisors and other agents with their chats. Although Service Cloud Chat contains default chat agent statuses, you can create custom agent statuses and associate them with either the Available or Unavailable status type. While working in Service Cloud Chat, agents can change their status as necessary.

Agent Statuses	Chat Status Types	Description	Default on Login Per Profile
Available	Available	The Unrestricted status indicates that there are no restrictions to an agent's availability to chat.	
Unavailable	Unavailable	The Unqualified status indicates that the agent did not specify a reason for being unavailable to chat.	Default

Logged Out	Logged Out	The agent is logged out of Service Cloud Chat. This chat status does not display to staff on the Agent Status dropdown menu.	Default

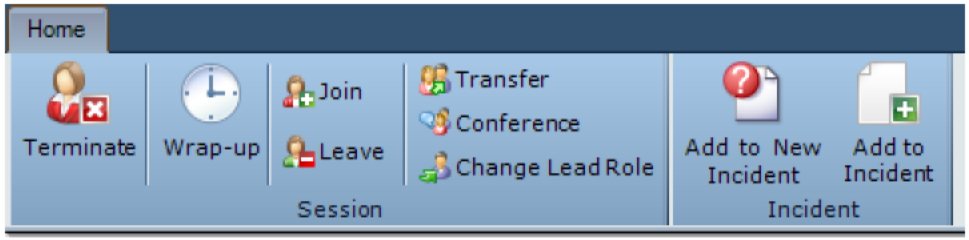
2.3.4 Chat Workspace

The configuration of the content pane when working in Chat. Standard workspaces exist for each type of workspace, and custom workspaces can be created. The workspaces staff members use depend on the workspaces selected in their profile. Chat workspace will include the following fields:

Label	Notes
First Name	Contact's First Name
Last Name	Contact's Last Name
Question	The question that customer submitted with the chat request
Email	Contact's Email Address
Queue	Chat Queue
Role	Contact's Role
Type	Incident Call Type
Resolution	Incident Disposition
Callback Number	Contact's callback number

2.3.5 Chat Workspace Ribbon

The chat ribbon bar will allow the agent to Terminate, Wrap-up, Leave a conference, Transfer chat to another agent, Conference another agent, Change the Assignment of the chat to another agent, Join a conference when invited.



2.3.6 Chat Session Alerts

Service Cloud Chat has configurable service level requirements that allow you to set realistic service goals for your agents and reasonable expectations for your customers. Default value is 30 seconds before tab turns yellow and another 30 seconds before tab turns red.

2.3.7 Chat Wrap-up Time

Wrap-up mode allows agents to complete any post-chat tasks before automatically receiving the next chat request. Wrap-up time will be 45 seconds.

2.3.8 Creating Incident from Chat Sessions

Service Cloud Service can capture chat sessions as incidents, allowing you to track all chat correspondence. By default, agents are prompted to create an incident when a chat sessions ends, but this functionality is configurable so that an incident can be created when a chat session begins

Option	Description
Create/associate related incident at the beginning of a chat?	Select from the following radio buttons. • Yes • No • Prompt the agent to decide at runtime Note: This option to set to Yes by default.

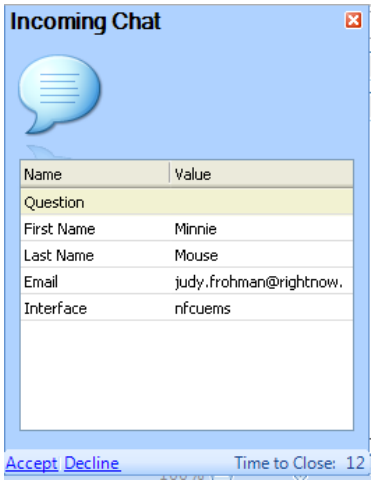
Open related incident for editing at the beginning of a chat (if one exists)?	Select from the following radio buttons. • Yes • No • Prompt the agent to decide at runtime Note: This option is set to No by default.
Create/associate related incident at the end of a chat (if one does not exist)?	Select from the following radio buttons. • Yes • No • Prompt the agent to decide at runtime Note: This option is set to No by default.
Open related incident for editing at the end of a chat (if one exists)?	Select from the following radio buttons. • Yes • No • Prompt the agent to decide at runtime Note: This option is set to No by default.
Discard previous related incident if it is uncommitted when another incident is associated to the chat?	Select from the following radio buttons. • Yes

	• No • Prompt the agent to decide at runtime Note: This option is set to No by default.

2.3.9 Preliminary Screen Pop

Customize the look of the toast notification. Only the following fields can be configured. Modification of toast notification will include changing the order and the fields that appear. The agent acceptance time for the chat is 30 seconds but this can be changed. After 30 seconds the chat will automatically be routed to the next available agent.

- Question
- First Name
- Last Name
- Email
- Call Type
- Custom Fields



2.4 Chat Launch Page

The Chat Launch page is comprised of a web form that your customers fill out when creating chat requests. There will be a single chat launch page in English with a web form. The Customer requesting a chat will be required to fill in a few fields prior to submitting the chat request.

URL
https://coveredca.custhelp.com/app/chat/chat_launch

Support Center

Support Home | Answers | Ask a Question | Your Account

Live Help

Chat with a member of our support team

Subject

First Name *

Last Name *

Email Address *

Submit

Chat support is available

Chat hours are listed below.

Monday: 10:00 AM - 06:00 PM CDT
Tuesday: 10:00 AM - 12:00 AM CDT
Wednesday - Friday: 10:00 AM - 06:00 PM CDT
Saturday - Sunday: Closed
It is currently Tuesday, May 13, 2014 07:15 PM CDT

2.4.1 Chat Launch Fields

The following fields will be used for Covered CA's Chat Launch page.

Fields	Label	Required
Product/Role	Select a Role	Level 3 is required
First Name	First Name	Required
Last Name	Last Name	Required
Email Address	Email Address	Required
Call Back Number	Phone	Optional
Interaction Zip	Zip Code	Optional
Language	Language - English - Spanish	Required
Topic	Topic	Optional

2.5 Profiles

A profile is the mechanism for controlling access to administration functions and for assigning staff member's specific permissions, default workspaces, a default navigation set, and report access. The following profiles will be created by [redacted]:

Profile Name	Assigned Queues to pull incidents	Pull Policy	Description
SCR	N/A	- Manual Assignment by Supervisor - Can self-assign incident while on phone customer	Access to Incident Management
SCR Lead	N/A	- Manual Assignment by Supervisor - Can self-assign incident while on phone customer	Access to Incident Management
SCR Supervisor	SCR Supervisor	Manual Assignment to self, SCR Lead, or SCR	Access to Incident and Chat Management Full reports access

SCR Chat – English	SCR - English	Chat Push – English Selection	Access to Incident and Chat Management
SCR Chat – Spanish	SCR – Spanish	Chat Push – Spanish Selection	Access to Incident and Chat Management
SCR Manager	SCR Supervisor	Manual Assignment	Access to Incident and Chat Management Not available for assignment from other teams Full reports access

2.6 Staff Accounts

A staff member authorized to access an Oracle Service Cloud application, including user name, password, profile, group assignment, and email information. The below table indicates all of the SCR CRM users and the profiles that they will be assigned to.

[redacted]

Profile	Last Name	First Name
SCR Manager		
SCR Supervisor		
SCR Lead		
SCR		
SCR Chat – English		
SCR Chat - Spanish		

2.7 Reports & Dashboards

2.7.1 SCR-Manager Navigation Set

Role	Navigation Button	Item Name	Item Description
Manager	Home	Manager Dashboard	This dashboard displays all open incidents assigned to each queue. SCRs will use this dashboard to find and work on incidents. Incidents will be color coded red after open and unassigned for more 3+ calendar days day. - Dashboard Includes: o All Unassigned Incidents by Queue o All Assigned Incidents by Queue o My Inbox
		Notifications	A list of all system generated notifications created for the logged in user.
	Analytics	All Incidents touched by SCR	A list of all incidents that were assigned to the SCR queue through time.
		Incident Aging Report	A list of all incidents currently assigned to SCR sorted by Age. Row text will turn red when incident age exceeds 3 calendar days after incidents assigned AND in Open status.

		Service Request Statistics by Category Dashboard	A dashboard comprised of the following reports where Category = SCR Call Type - Incident Activity by Category Displays statistics about incidents associated with a specified date range. Statistics include the number of unassigned, assigned, and resolved incidents, and the number of responses, the RPI per incident, and the number of incidents that were re-assigned. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incident Effectiveness by Category Displays statistics about incidents associated with a certain range of contacts or organizations, grouped by product or category. Statistics include the number of incidents, the RPA, FCRR, number of responses per product or category, and number of solves per product or category. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incidents Created by Category

			Displays all incidents created in a specific time period and groups them by category. You can then drill down to the sub-category level or products within categories. This report is useful for determining the categories most often used when end-users submit an incident. This report also displays all the incidents created within the specified time period sorted by product. This report is useful for determining what products are generating the most questions and what those questions are.

		Service Request Statistics Dashboard	A dashboard comprised of the following reports: - Incident Activity Displays statistics about incidents associated with a specified date range. Statistics include the number of unassigned, assigned, and resolved incidents, and the number of responses, the RPI per incident, and the number of incidents that were re-assigned. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incident Effectiveness Displays statistics about incidents associated with a certain range of contacts or organizations, grouped by product or category. Statistics include the number of incidents, the RPA, FCRR, number of responses per product or category, and number of solves per product or category. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incident Creation Rate

			Displays statistics of new incidents created per hour of day, day of week, day of month, or month of year. The Incident Creation Rate report is useful for calculating an incident-per-hour/day/month ratio and comparing it against other time periods.
		Agent Performance	Displays statistics about the number of incidents worked on during the specified time period by a staff member or group, and the average time spent working on the incidents. Use this report to determine the work efficiency of staff members and identify the average response time or solution time for each staff member.
		Agent Performance – Incidents not touched	Same as Agent Performance only this shows incidents that have not been edited by the assigned user.
		SCR Queue Activity	Reports on how many incidents are in each queue during a specified date range. You can view how many were assigned, resolved, and the number of responses for each incident, all grouped by queue.
		SCR Queue Transitions	The report provides information about the number of times incidents transitioned between queues.

		SCR Agent Activity	Displays statistics about how agents have handled incidents during a specified time period. Included are statistics on how many incidents agents had assigned to them, how many were resolved, how many responses agents made, and their responses per assignment (RPA). Incidents are included in this report if they were initially assigned, responded to or reassigned during the date range specified in the report's parameters and were assigned to a staff member. Only incidents that were responded to by the agent are included in the report. Incidents that were assigned to the agent, but the agent did not send a response will not be counted.
		Group Activity	Displays by group the statistics about how agents have handled incidents during a specified time period. Included are statistics on how many incidents agents had assigned to them, how many were resolved, how many responses agents made, and their responses per assignment (RPA). Incidents are included in this report if they were initially assigned, responded to or reassigned during the date range specified in the report's parameters and were assigned to a staff member. Only incidents that were responded to by the agent are included in the report. Incidents that were assigned to the agent, but the agent did not send a response will not be counted.
		SCR Incidents by Status	Displays all incidents assigned to SCR by their Status.
		SCR Incidents by Type	Displays all incidents assigned to the SCR Queue by their SCR Type.
		SCR by Type	Displays all incidents assigned by SCR and by Type.

		SCR by Call Resolution	Displays all incidents assigned by SCR and by Call Resolution.
		CalHEERS Ticket Data	Displays all incidents that contain CalHEERS Ticket data.
		Reports Explorer	Access to all reports (800+)
	Contacts	All Contacts	The All Contacts report lists all the contacts in your database. You can filter the contacts or search for specific contact records. Each contact's email address, last name, first name, Phone number, Case ID.
	Quick Search	Incident Quick Search	Quickly find an incident by reference number, CalHEERS Ticket Number, First Name, Last Name, Case ID, Email, Phone, Last 4 of SSN.
		Contact Quick Search	Quickly find a contact record First name, Last name, Email address, Phone, Case ID, Phone, Last 4 of SSN.
		Answer Quick Search	Quickly find an Answer by phrase or ID.

2.7.2 SCR-Supervisor Navigation Set

Role	Navigation Button	Item Name	Item Description
Supervisor	Home	Supervisor Dashboard	This dashboard displays all open incidents assigned to each queue. SCRs will use this dashboard to find and work on incidents. Incidents will be color coded red after open and unassigned for more 3+ calendar days day. - Dashboard Includes: o All Unassigned Incidents by Queue o All Assigned Incidents by Queue o My Inbox
		Notifications	A list of all system generated notifications created for the logged in user.
	Analytics	All Incidents touched by SCR	A list of all incidents that were assigned to the EC queue through time.
		Incident Aging Report	A list of all incidents currently assigned to SCR sorted by Age. Row text will turn red when incident age exceeds 3 calendar days after incidents assigned AND in Open status.

		Service Request Statistics by Category Dashboard	A dashboard comprised of the following reports where Category = SCR Call Type - Incident Activity by Category Displays statistics about incidents associated with a specified date range. Statistics include the number of unassigned, assigned, and resolved incidents, and the number of responses, the RPI per incident, and the number of incidents that were re-assigned. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incident Effectiveness by Category Displays statistics about incidents associated with a certain range of contacts or organizations, grouped by product or category. Statistics include the number of incidents, the RPA, FCRR, number of responses per product or category, and number of solves per product or category. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incidents Created by Category

			Displays all incidents created in a specific time period and groups them by category. You can then drill down to the sub-category level or products within categories. This report is useful for determining the categories most often used when end-users submit an incident. This report also displays all the incidents created within the specified time period sorted by product. This report is useful for determining what products are generating the most questions and what those questions are.

		Service Request Statistics Dashboard	A dashboard comprised of the following reports: - Incident Activity Displays statistics about incidents associated with a specified date range. Statistics include the number of unassigned, assigned, and resolved incidents, and the number of responses, the RPI per incident, and the number of incidents that were re-assigned. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incident Effectiveness Displays statistics about incidents associated with a certain range of contacts or organizations, grouped by product or category. Statistics include the number of incidents, the RPA, FCRR, number of responses per product or category, and number of solves per product or category. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incident Creation Rate

			Displays statistics of new incidents created per hour of day, day of week, day of month, or month of year. The Incident Creation Rate report is useful for calculating an incident-per-hour/day/month ratio and comparing it against other time periods.
		Agent Performance	Displays statistics about the number of incidents worked on during the specified time period by a staff member or group, and the average time spent working on the incidents. Use this report to determine the work efficiency of staff members and identify the average response time or solution time for each staff member.
		Agent Performance – Incidents not touched	Same as Agent Performance only this shows incidents that have not been edited by the assigned user.
		SCR Queue Activity	Reports on how many incidents are in each queue during a specified date range. You can view how many were assigned, resolved, and the number of responses for each incident, all grouped by queue.
		SCR Queue Transitions	The report provides information about the number of times incidents transitioned between queues.

		SCR Agent Activity	Displays statistics about how agents have handled incidents during a specified time period. Included are statistics on how many incidents agents had assigned to them, how many were resolved, how many responses agents made, and their responses per assignment (RPA). Incidents are included in this report if they were initially assigned, responded to or reassigned during the date range specified in the report's parameters and were assigned to a staff member. Only incidents that were responded to by the agent are included in the report. Incidents that were assigned to the agent, but the agent did not send a response will not be counted.
		Group Activity	Displays by group the statistics about how agents have handled incidents during a specified time period. Included are statistics on how many incidents agents had assigned to them, how many were resolved, how many responses agents made, and their responses per assignment (RPA). Incidents are included in this report if they were initially assigned, responded to or reassigned during the date range specified in the report's parameters and were assigned to a staff member. Only incidents that were responded to by the agent are included in the report. Incidents that were assigned to the agent, but the agent did not send a response will not be counted.
		SCR Incidents by Status	Displays all incidents assigned to SCR by their Status.
		SCR Incidents by Type	Displays all incidents assigned to the SCR Queue by their SCR Type.
		SCR by Type	Displays all incidents assigned by SCR and by Type.

		SCR by Call Resolution	Displays all incidents assigned by SCR and by Call Resolution.
		CalHEERS Ticket Data	Displays all incidents that contain CalHEERS Ticket data.
		Reports Explorer	The All Contacts report lists all the contacts in your database. You can filter the contacts or search for specific contact records. Each contact's email address, last name, first name, and opt-in status are displayed.
	Communication Center	Chat Supervisor Real-Time Dashboard	Dashboard displaying three separate real-time chat statistic reports for Supervisors.
	Contacts	All Contacts	The All Contacts report lists all the contacts in your database. You can filter the contacts or search for specific contact records. Each contact's email address, last name, first name, and opt-in status are displayed.
	Quick Search	Incident Search	Quickly find an incident by reference number, CalHEERS Ticket Number, First Name, Last Name, Case ID, Email, Phone, Last 4 of SSN.
		Contact Quick Search	Quickly find a contact record First name, Last name, Email address, Phone, Case ID, Phone, Last 4 of SSN.
		Answer Quick Search	Quickly find an Answer by phrase or ID.

2.7.3 SCR & SCR Lead Navigation Set

Role	Navigation Button	Item Name	Item Description
SCR or Lead	Home	My Inbox	All Incidents currently assigned to logged-in user.
		Notifications	A list of all system generated notifications created for the logged in user.
	Contacts	All Contacts	The All Contacts report lists all the contacts in your database. You can filter the contacts or search for specific contact records. Each contact's email address, last name, first name, and opt-in status are displayed.
	Quick Search	Incident Search	Quickly find an incident by reference number, CalHEERS Ticket Number, First Name, Last Name, Case ID, Email, Phone, Last 4 of SSN.
		Contact Quick Search	Quickly find a contact record First name, Last name, Email address, Phone, Case ID, Phone, Last 4 of SSN.
		Answer Quick Search	Quickly find an Answer by phrase or ID.

2.7.4 SCR Chat – English & Spanish

Role	Navigation Button	Item Name	Item Description
SCR Chat	Home	My Inbox	All Incidents currently assigned to logged in user.
		Notifications	A list of all system generated notifications created for the logged in user.
	Communication Center	Chat Agent Real-Time Dashboard	Dashboard displaying three separate real-time chat statistic reports for chat support representatives.
	Contacts	All Contacts	The All Contacts report lists all the contacts in your database. You can filter the contacts or search for specific contact records. Each contact's email address, last name, first name, and opt-in status are displayed.
	Quick Search	Incident Search	Quickly find an incident by reference number, CalHEERS Ticket Number, First Name, Last Name, Case ID, Email, Phone, Last 4 of SSN.
		Contact Quick Search	Quickly find a contact record First name, Last name, Email address, Phone, Case ID, Phone, Last 4 of SSN.
		Answer Quick Search	Quickly find an Answer by phrase or ID.

Covered California/CRM
Spanish Interface - Chat
Solution Design Documentation

Version 1.0

VERSION CONTROL

Version	Change Description	Modified By	Date
1.0	Initial Draft	[redacted]	09/22/2015
1.1			
1.2			

[redacted]

CONTENTS

1 OVERVIEW 4
1.1 Purpose/ Project Charter 4
1.2 Intended Audience 4
1.3 Sign Off Approval 4
2 Functional Workflow 5
2.1 Primary Use Cases 5
3 Interface Specific Configuration for CHAT 6
3.1 Chat Launch Page 6
3.2 Chat Landing Page 7
3.3 Chat Hours 8
3.4 Spanish Chat – Standard Text 9
4 Site-Wide Configuration for CHAT 10
4.1 Products 10
4.2 Chat Business Rules 11
4.3 Chat Session Queues 13
4.4 Chat Agent Status 13
4.5 Chat Workspace 14
4.6 Chat Workspace Ribbon 14
4.7 Chat Session Alerts 14
4.8 Chat Wrap-up Time 15
4.9 Creating Incident from Chat Sessions 15
4.10 Preliminary Screen POP 16
4.11 Profiles 17
4.12 Staff Accounts 19
4.13 SCR Chat – English & Spanish Navigation Set 20
4.14 Workspaces 21
4.15 Reports 21
5 DESIGN ISSUES 22

1 OVERVIEW

1.1 Purpose/ Project Charter

The completed project will allow the Spanish speaking community an additional channel to communicate with Covered California Service Center Representative (SCR) via chat during normal business hours.

1.2 Intended Audience

CRM Development
Project Sponsors

1.3 Sign Off Approval

_____
_____
_____

2 FUNCTIONAL WORKFLOW

Oracle RightNow provides the ability for Service Center Representative (SCR) to chat directly with Covered California site users via a browser-based interactive chat session. Chats are initiated by site users when they click the "Live Chat" link in the Covered California or CALHEERS web portal. Currently, CRM is configured to allow all site users to chat in English via the English interface and does not have the ability to allow site users to chat in Spanish.

A new Spanish interface has been purchased and will be configured by the CRM Development to allow Spanish speaking to chat with Covered California (SCR) in Spanish.

Note: Out of the box fields are automatically translated, however, custom fields and custom object name are not translated. Also, workspaces are interface depended.

Spanish Chat

2.1 Primary Use Cases

Covered California site users initiate a chat session by clicking the "Live Chat" link from the Covered California or CALHEERS web portal. When the link is accessed, the user is directed to the appropriate Chat Launch Page.

Action	Path
"Live Chat" link from the English Web Portal is clicked	https://coveredca.custhelp.com/app/chat/chat_launch
"Live Chat" link from the Spanish Web Portal is clicked	https://coveredca-esp.custhelp.com/app/chat/chat_launch

3 INTERFACE SPECIFIC CONFIGURATION FOR CHAT

3.1 Customer Portal

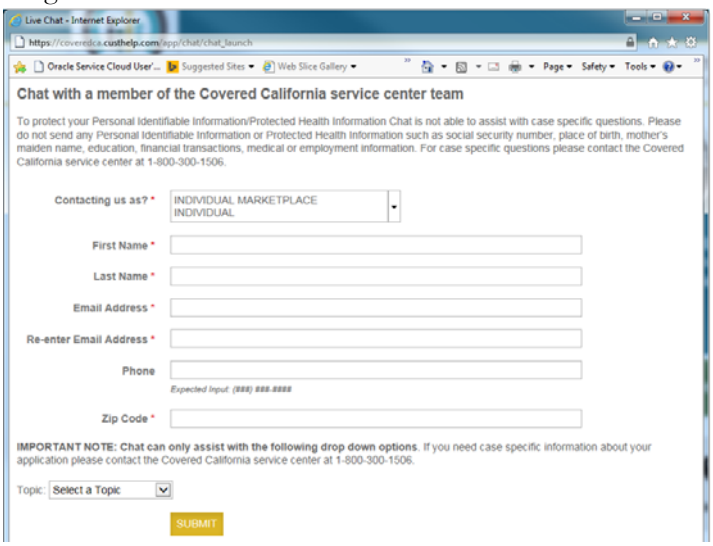
Custom Spanish chat message bases had been created for the Spanish chat launch page. Refer to the Associated Document section for details. The customer portal landing pages had been updated to use custom and system variables.

3.2 Chat Launch Page

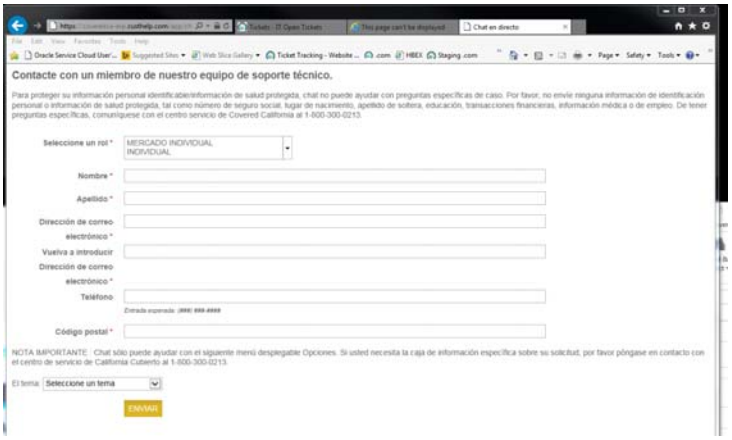
The Chat Launch page is comprised of a web form that your customers fill out when creating chat requests. There will be a single chat launch page in English with a web form. The customer requesting a chat will be required to fill in a few fields prior to submitting the chat request.

The following information will be requested from the chat user:

English Interface



Spanish Interface

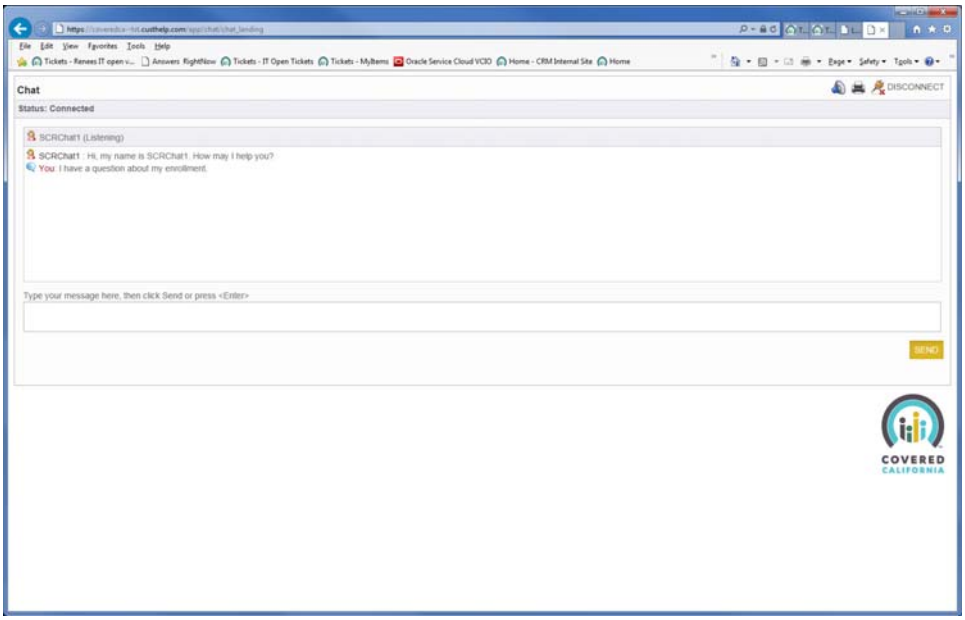


The user can selects one of these roles (Please note that this is the products/categories in CRM)

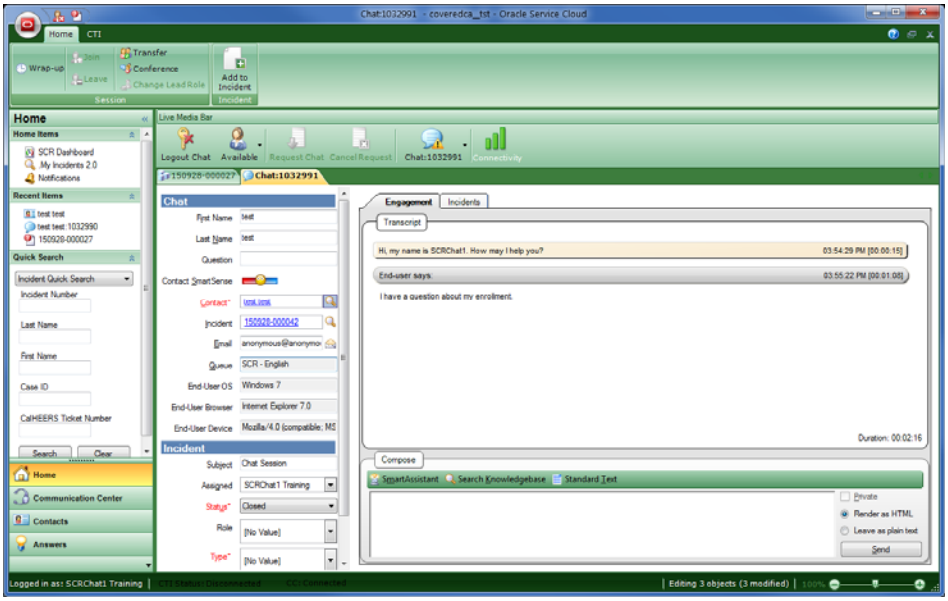
No Role Selected
Individual Marketplace
- Individual
- Health Plan
- Agent
- Authorized Rep

3.3 Chat Landing Page

Example screen from the consumer who initiated the chat:



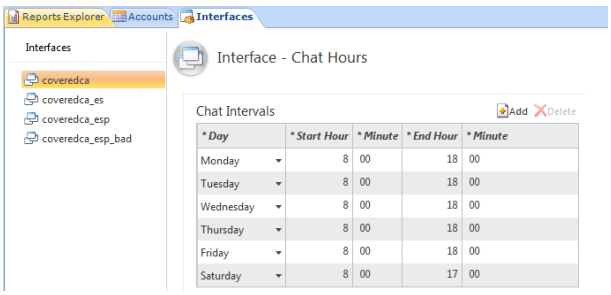
Example screen from the chat agent:



3.4 Chat Hours

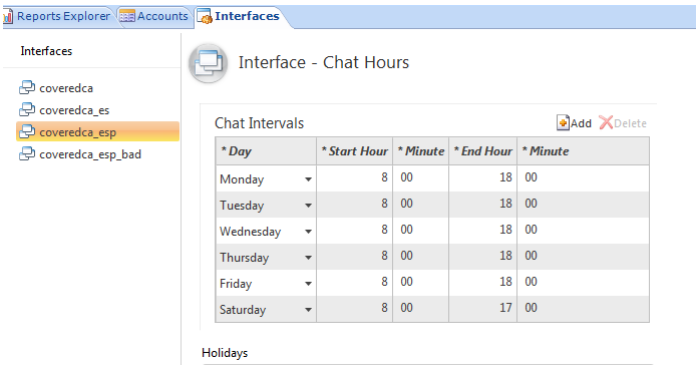
You can set chat hours for Service Cloud Chat availability to control when end-users can submit chat requests. Outside of those chat hours, end-users cannot request assistance. Additionally, your chat hours are displayed on the Chat Launch page. Chat hours will be defined as the earliest and the latest hours that agents will be available. If the customer requests a chat outside of the hours listed on the Chat Form, and an agent is not available, they will not be able to start a chat. All times below are in PST.

English Interface - coveredca



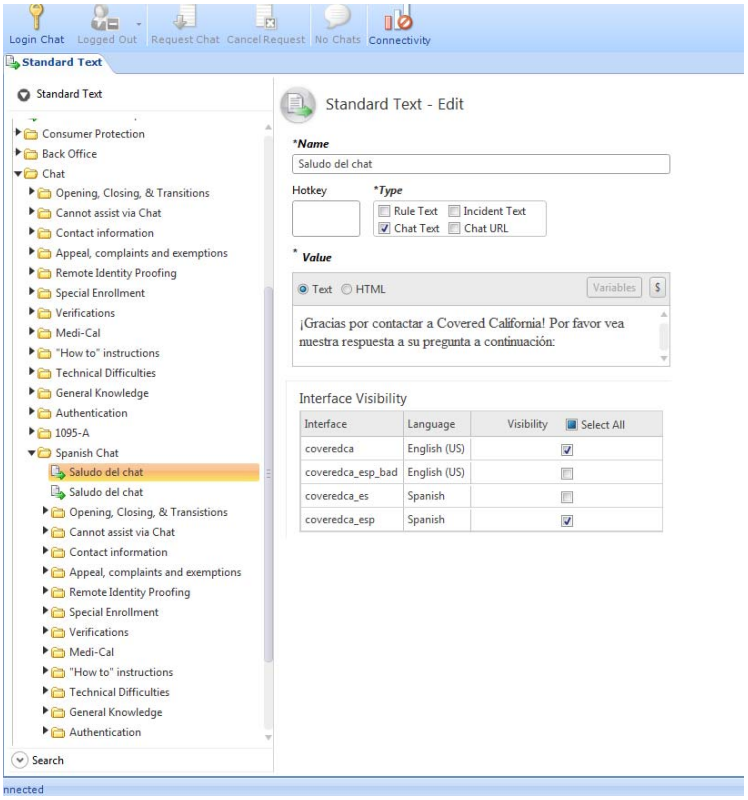
* Day	* Start Hour	* Minute	* End Hour	* Minute
Monday	8	00	18	00
Tuesday	8	00	18	00
Wednesday	8	00	18	00
Thursday	8	00	18	00
Friday	8	00	18	00
Saturday	8	00	17	00

Spanish Interface – coveredca_esp



3.5 Spanish Chat – Standard Text

The following Spanish Chat - Standard Text had been added to aid SCRs when answering Spanish Chat. Please refer to the Associated Documents section for the full list of Spanish Chat – Standard Text.

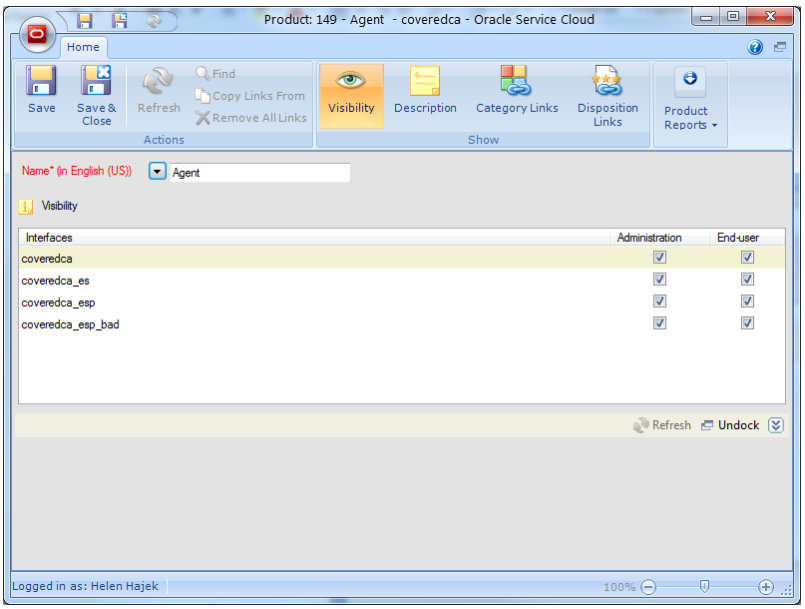


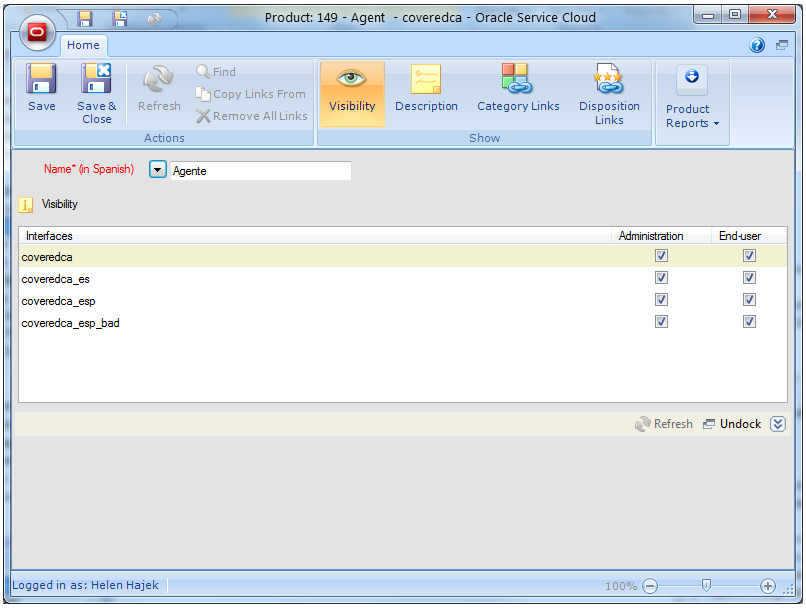
4 SITE-WIDE CONFIGURATION FOR CHAT

4.1 Products

Add the Spanish name for these roles under Products/categories.

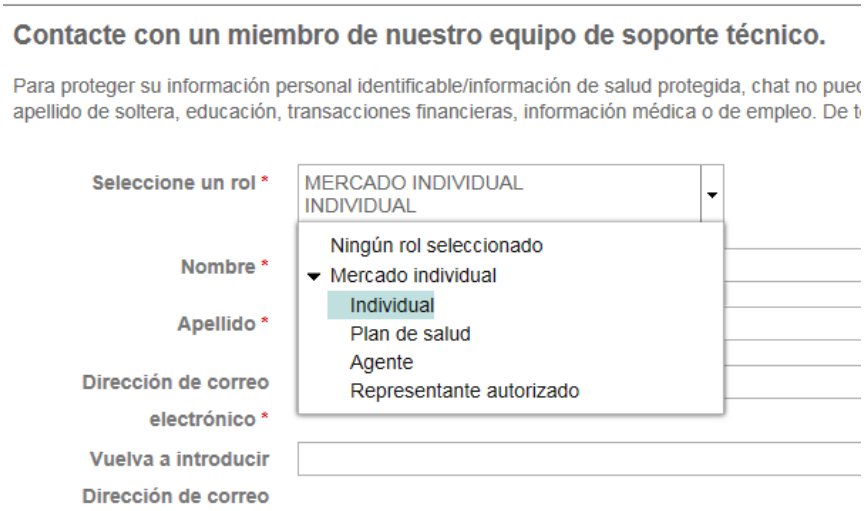
No Role Selected
Individual Marketplace
- Individual
- Health Plan
- Agent
- Authorized Rep





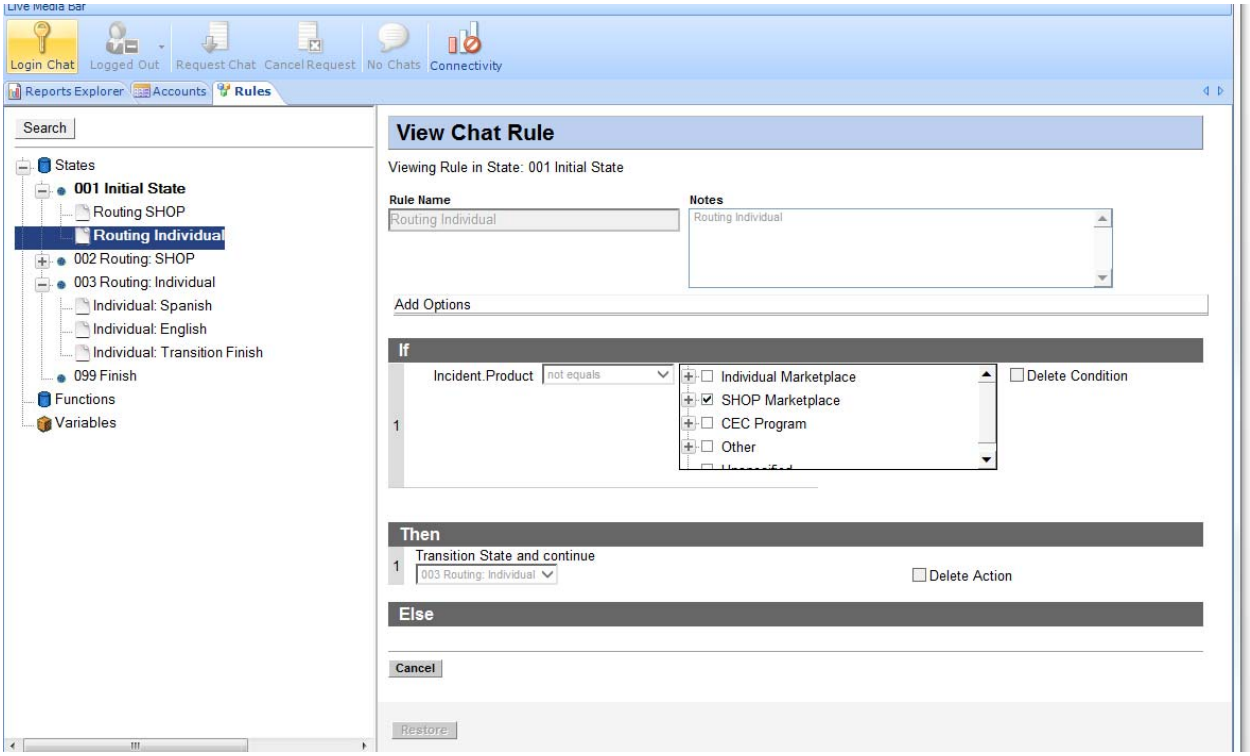
English – Chat Launch page

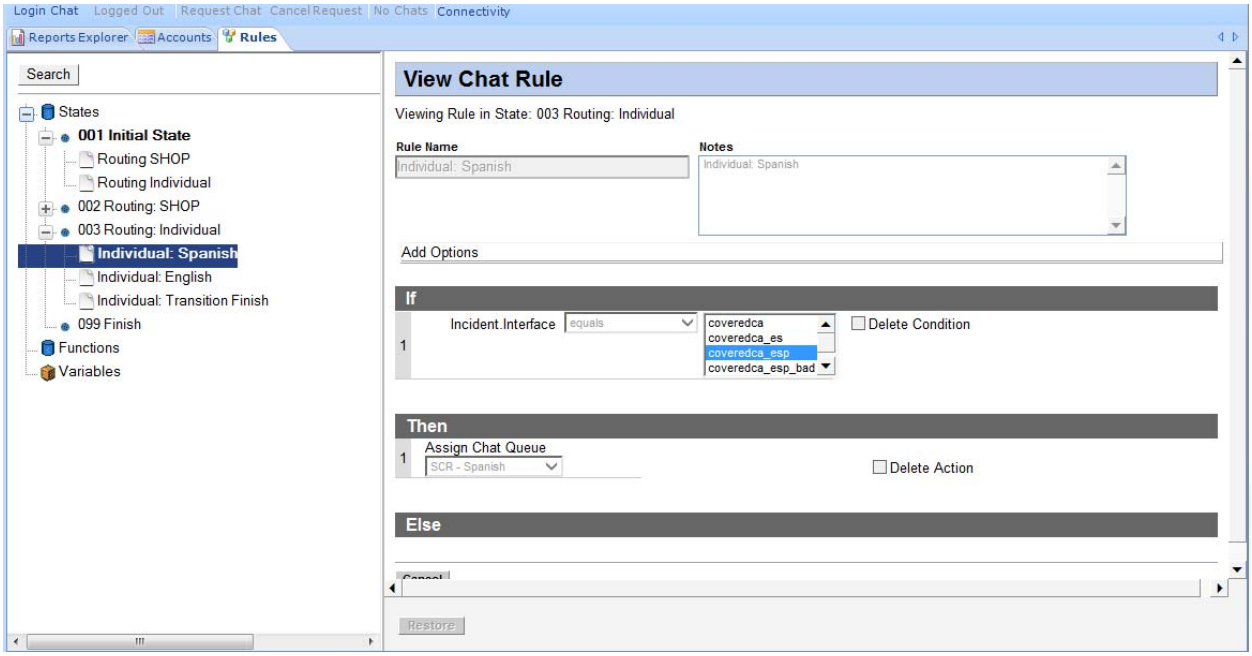
Spanish – Chat Launch page

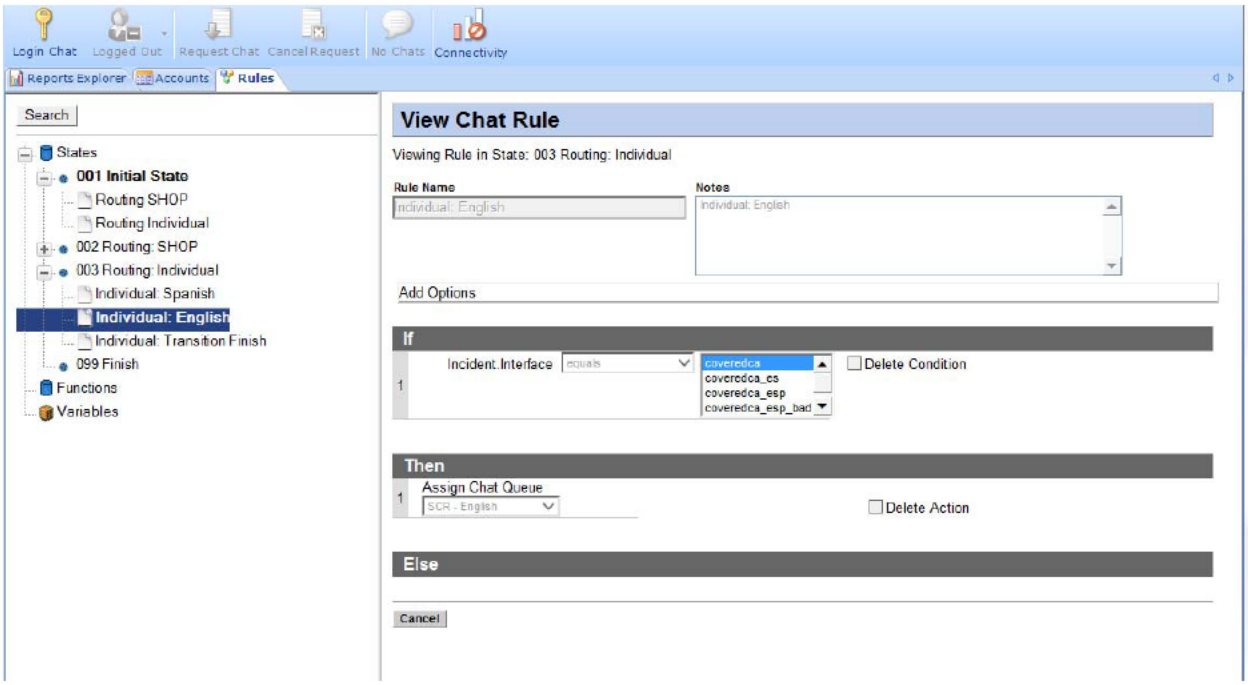


4.2 Chat Business Rules

Incoming chats are routed based on the interface that the chat was being initiated. The following chat business rules had been added to route incoming chats to the appropriate chat agents.


Live Media Bar
Login Chat
Logged Out
Request Chat
Cancel Request
No Chats
Connectivity
Reports Explorer
Accounts
Rules
Search
States
001 Initial State
Routing SHOP
Routing Individual
002 Routing: SHOP
003 Routing: Individual
Individual: Spanish
Individual: English
Individual: Transition Finish
099 Finish
Functions
Variables
View Chat Rule
Viewing Rule in State: 001 Initial State
Rule Name
Routing Individual
Notes
Routing Individual
Add Options
If
Incident.Product
not equals
Individual Marketplace
SHOP Marketplace
CEC Program
Other
Delete Condition
Then
Transition State and continue
003 Routing: Individual
Delete Action
Else
Cancel
Restore


Login Chat
Logged Out
Request Chat
Cancel Request
No Chats
Connectivity
Reports Explorer
Accounts
Rules
Search
States
001 Initial State
Routing SHOP
Routing Individual
002 Routing: SHOP
003 Routing: Individual
Individual: Spanish
Individual: English
Individual: Transition Finish
099 Finish
Functions
Variables
View Chat Rule
Viewing Rule in State: 003 Routing: Individual
Rule Name
Individual: Spanish
Notes
Individual: Spanish
Add Options
If
Incident.Interface
equals
coveredca
coveredca_es
coveredca_esp
coveredca_esp_bad
Delete Condition
Then
Assign Chat Queue
SCR - Spanish
Delete Action
Else
Restore



4.3 Chat Session Queues

When used with profiles and business rules, chat session queues enable automatic sorting of incoming chats based on contact, organization, product, category, and custom field information.

The following chat queues will be created:

Chat Queues
SCR English
SCR Spanish

4.4 Chat Agent Status

An agent's status describes his or her availability to chat with customers as well as assist supervisors and other agents with their chats. Although Service Cloud Chat contains default chat agent statuses, you can create custom agent statuses and associate them with either the Available or Unavailable status type. While working in Service Cloud Chat, agents can change their status as necessary.

Agent Statuses	Chat Status Types	Description	Default on Login Per Profile
Available	Available	The Unrestricted status indicates that there are no restrictions to an agent's availability to chat.	
Unavailable	Unavailable	The Unqualified status indicates that the agent did not specify a reason for being unavailable to chat.	Default

Logged Out	Logged Out	The agent is logged out of Service Cloud Chat. This chat status does not display to staff on the Agent Status dropdown menu.	Default

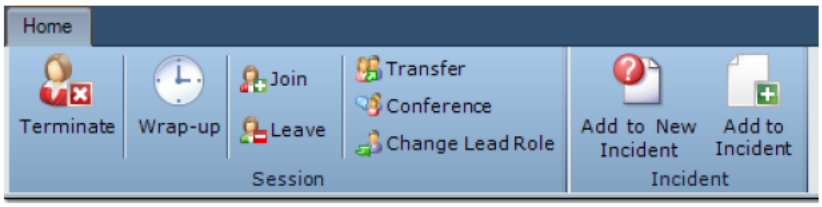
4.5 Chat Workspace

The configuration of the content pane when working in Chat. Standard workspaces exist for each type of workspace, and custom workspaces can be created. The workspaces staff members use depend on the workspaces selected in their profile. Chat workspace will include the following fields:

Label	Notes
First Name	Contact's First Name
Last Name	Contact's Last Name
Question	The question that customer submitted with the chat request
Email	Contact's Email Address
Queue	Chat Queue
Role	Contact's Role
Type	Incident Call Type
Resolution	Incident Disposition
Callback Number	Contact's callback number

4.6 Chat Workspace Ribbon

The chat ribbon bar will allow the agent to Terminate, Wrap-up, Leave a conference, Transfer chat to another agent, Conference another agent, Change the Assignment of the chat to another agent, Join a conference when invited.



4.7 Chat Session Alerts

Service Cloud Chat has configurable service level requirements that allow you to set realistic service goals for your agents and reasonable expectations for your customers. Default value is 30 seconds before tab turns yellow and another 30 seconds before tab turns red.

4.8 Chat Wrap-up Time

Wrap-up mode allows agents to complete any post-chat tasks before automatically receiving the next chat request. Wrap-up time will be 45 seconds.

4.9 Creating Incident from Chat Sessions

Service Cloud Service can capture chat sessions as incidents, allowing you to track all chat correspondence. By default, agents are prompted to create an incident when a chat sessions ends, but this functionality is configurable so that an incident can be created when a chat session begins

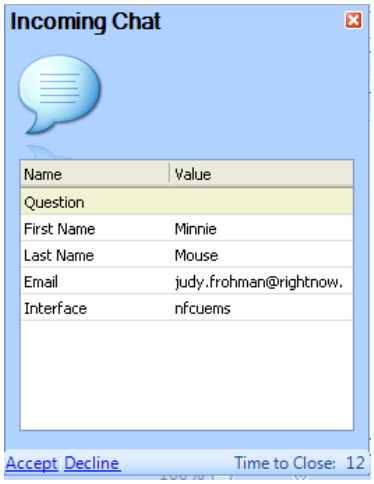
Option	Description
Create/associate related incident at the beginning of a chat?	Select from the following radio buttons. • Yes • No • Prompt the agent to decide at runtime Note: This option to set to Yes by default.
Open related incident for editing at the beginning of a chat (if one exists)?	Select from the following radio buttons. • Yes • No • Prompt the agent to decide at runtime Note: This option is set to No by default.
Create/associate related incident at the end of a chat (if one does not exist)?	Select from the following radio buttons. • Yes • No • Prompt the agent to decide at runtime Note: This option is set to No by default.
Open related incident for editing at the end of a chat (if one exists)?	Select from the following radio buttons. • Yes • No • Prompt the agent to decide at runtime

	Note: This option is set to No by default.
Discard previous related incident if it is uncommitted when another incident is associated to the chat?	Select from the following radio buttons. • Yes • No • Prompt the agent to decide at runtime Note: This option is set to No by default.

4.10 Preliminary Screen POP

Customize the look of the toast notification. Only the following fields can be configured. Modification of toast notification will include changing the order and the fields that appear. The agent acceptance time for the chat is 30 seconds but this can be changed. After 30 seconds the chat will automatically be routed to the next available agent.

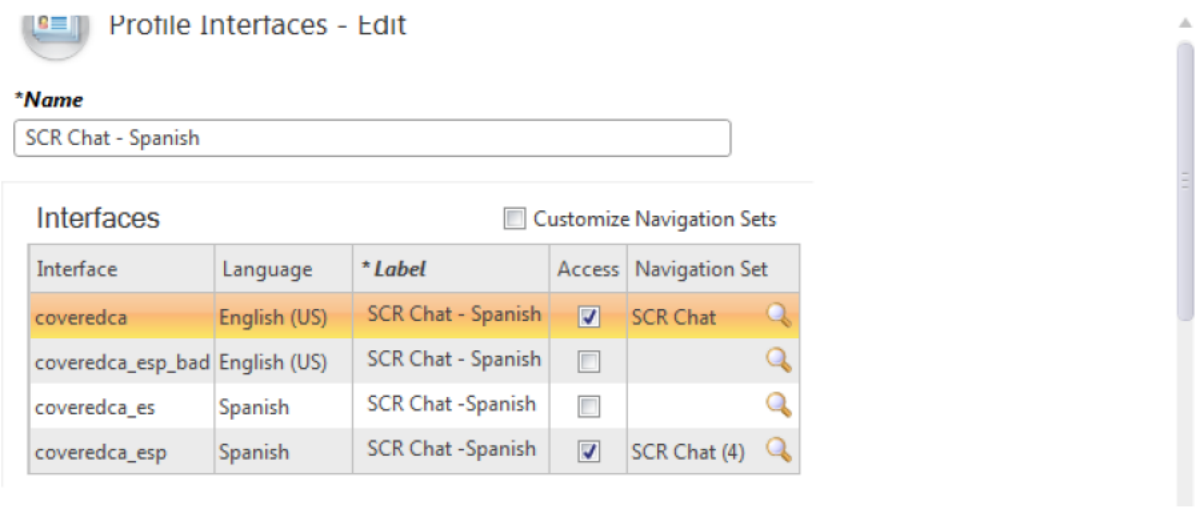
- Question
- First Name
- Last Name
- Email
- Call Type
- Custom Fields

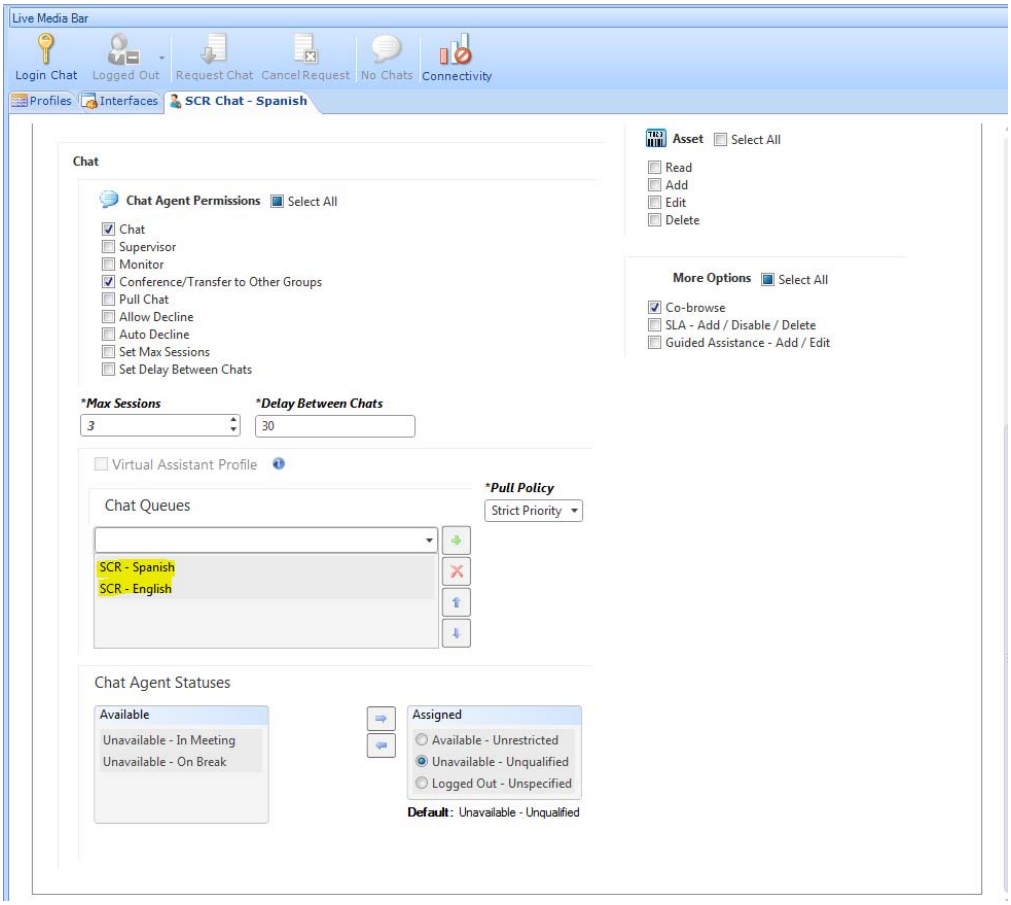


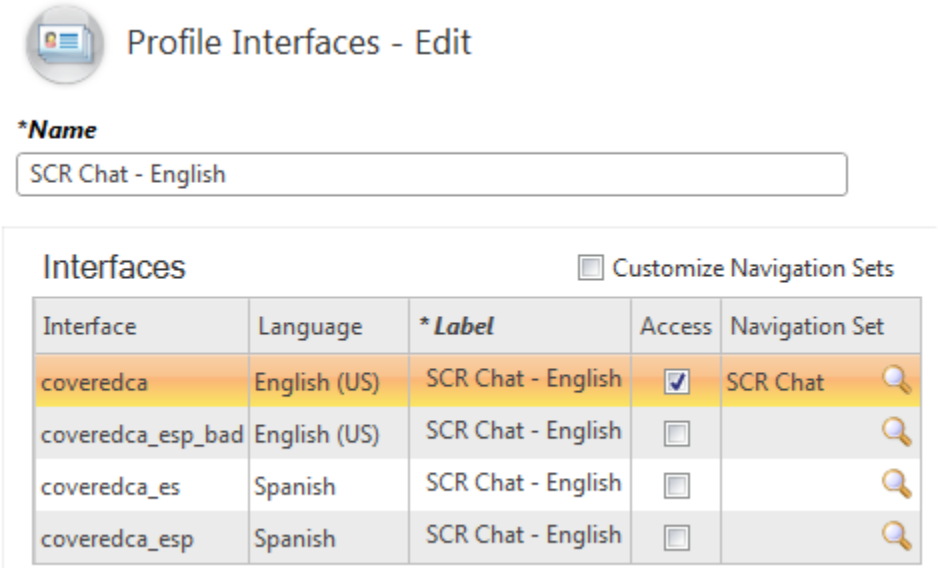
4.11 Profiles

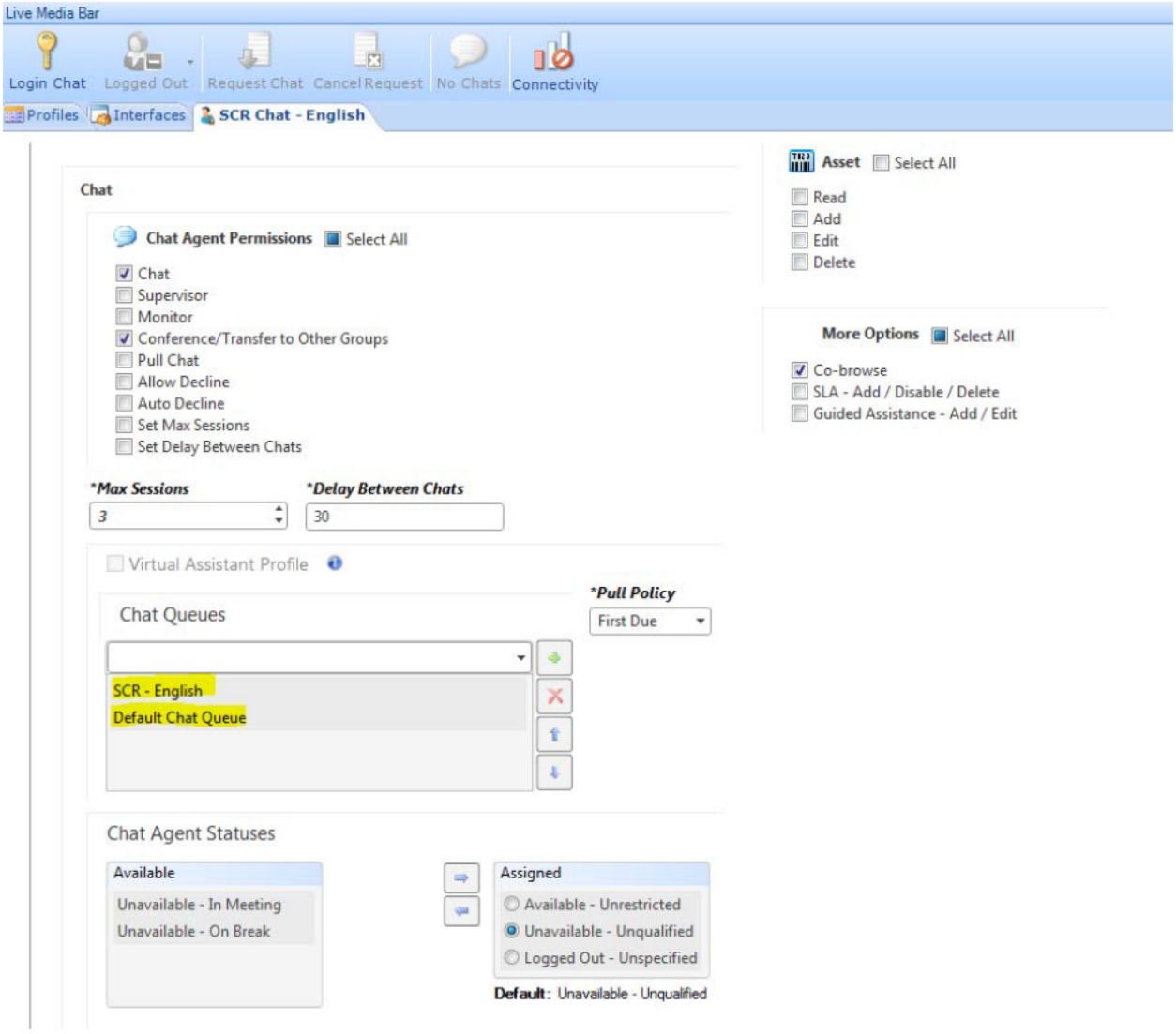
A profile is the mechanism for controlling access to administration functions and for assigning staff member's specific permissions, default workspaces, a default navigation set, and report access. The following profiles will be created:

Profile Name	Assigned Queues to pull incidents	Pull Policy	Description
SCR Chat – English	SCR - English	Chat Push – English Selection	Access to Incident and Chat Management
SCR Chat – Spanish	SCR – Spanish	Chat Push – Spanish Selection	Access to Incident and Chat Management




Live Media Bar
Login Chat
Logged Out
Request Chat
Cancel Request
No Chats
Connectivity
Profiles
Interfaces
SCR Chat - Spanish
Chat
Chat Agent Permissions
Select All
Chat
Supervisor
Monitor
Conference/Transfer to Other Groups
Pull Chat
Allow Decline
Auto Decline
Set Max Sessions
Set Delay Between Chats
*Max Sessions
3
*Delay Between Chats
30
Virtual Assistant Profile
Chat Queues
*Pull Policy
Strict Priority
SCR - Spanish
SCR - English
Chat Agent Statuses
Available
Unavailable - In Meeting
Unavailable - On Break
Assigned
Available - Unrestricted
Unavailable - Unqualified
Logged Out - Unspecified
Default: Unavailable - Unqualified
Asset
Select All
Read
Add
Edit
Delete
More Options
Select All
Co-browse
SLA - Add / Disable / Delete
Guided Assistance - Add / Edit


Profile Interfaces - Edit
*Name
SCR Chat - English
Interfaces
Customize Navigation Sets
Interface
Language
*Label
Access
Navigation Set
coveredca
English (US)
SCR Chat - English
SCR Chat
coveredca_esp_bad
English (US)
SCR Chat - English
coveredca_es
Spanish
SCR Chat - English
coveredca_esp
Spanish
SCR Chat - English



4.12 Staff Accounts

A staff member authorized to access an Oracle Service Cloud application, including user name, password, profile, group assignment, and email information. The below table indicates all of the SCR Spanish Chat users and the profiles that they will be assigned to.

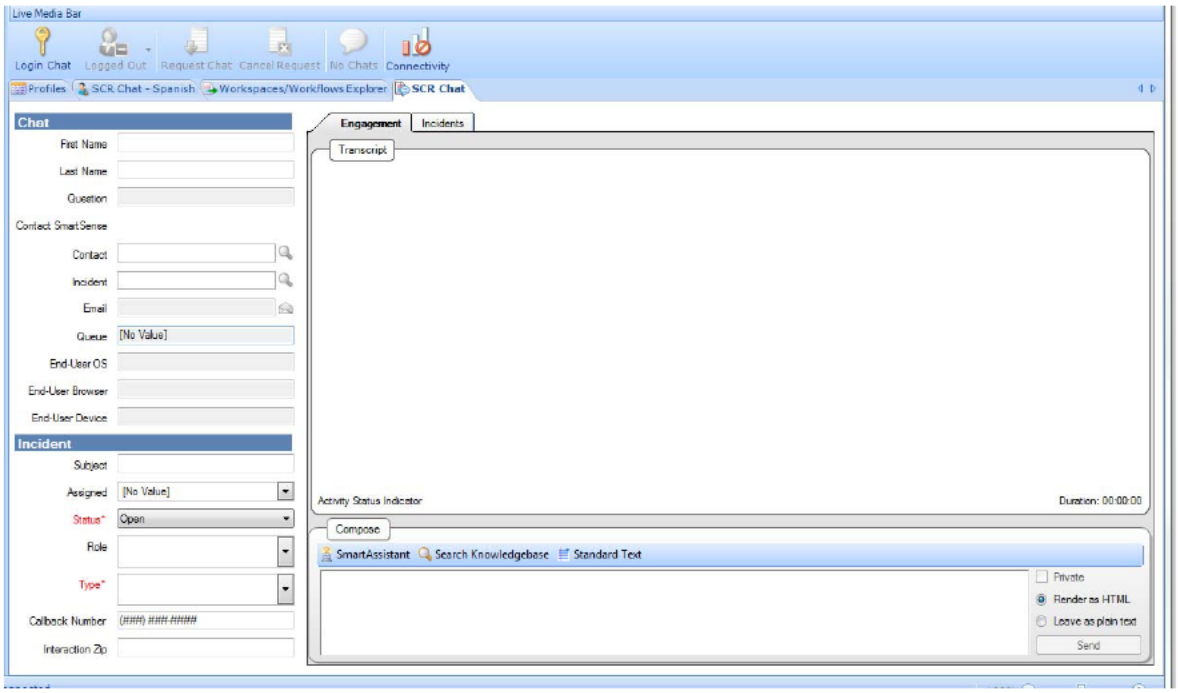
Name	Profile

4.13 SCR Chat – English & Spanish Navigation Set

Role	Navigation Button	Item Name	Item Description
SCR Chat	Home	My Inbox	All Incidents currently assigned to login user.
		Notifications	A list of all system generated notifications created for the logged in user.
	Communication Center	Chat Agent Real-Time Dashboard	Dashboard displaying three separate real-time chat statistic reports for chat support representatives.
	Contacts	All Contacts	The All Contacts report lists all the contacts in your database. You can filter the contacts or search for specific contact records. Each contact's email address, last name, first name, and opt-in status are displayed.
	Quick Search	Incident Search	Quickly find an incident by reference number, CalHEERS Ticket Number, First Name, Last Name, Case ID, Email, Phone, Last 4 of SSN.
		Contact Quick Search	Quickly find a contact record First name, Last name, Email address, Phone, Case ID, Phone, Last 4 of SSN.
		Answer Quick Search	Quickly find an Answer by phrase or ID.

4.14 Workspaces

Spanish and English chat agents uses the same workspace



4.15 Chat Reports

Report	Report ID	Description
WFM Chat Summary - Combined	101932	Displays statistics about the number of chat requests received and handled by agents during the date range. You can also view the average handle time, average waiting time, and Average Speed of Answer for chat requests **Average Wait Time** – Average amount of time end-users spent in the queue before their requests were accepted by an agent **Average Speed of Answer** – Average amount of time end-users spent in the queue before their requests were accepted by an agent Note: Report requested by WFM (Help Desk ticket 14675)
WFM Chat Summary - English	106930	
WFM Chat Summary - Spanish	106933	
Chat Concurrency Factor - Combined	106927	This report will provide statistics on the total time spent in chats and the total time engaged to determine concurrency factor. Concurrency Factor is defined as the sum of the individual chat times divided by the total time engaged (i.e. time spent chatting.) It can provide an overview of the number of chats being handled at once. The user will choose to group the data by Agent or Group at the time the report is generated. Note: Report requested by WFM (Help Desk ticket 14675)
Chat Concurrency Factor - English	106928	
Chat Concurrency Factor - Spanish	106929	

5 DESIGN ISSUES

The following section includes items that require further clarity in the design of this project.

This does not include all project issues, just items which require resolution for completion of the design of this project.

ID	Description	Date Identified	Assigned To	Status
				TBD

Covered CA – CRT
Incident Management
Oracle Service Cloud Solution Definition Document

April 29, 2015

Submitted To: Covered CA

Contents

1 INTRODUCTION 3
1.1 Purpose of Functional Solution Definition 3
1.2 Project Overview and Scope 3
2 REQUIREMENTS 3
2.1 Incident Management 3
2.1.1 Incident Management Process 3
2.1.2 Channels 8
2.1.3 Internal Transfer 8
2.1.4 New Incident by CRT 8
2.1.5 Incident Queues 9
2.1.6 Incident Routing Rules 9
2.1.7 Incident Statuses 9
2.1.8 Standard Text 10
2.1.9 Response Requirements 10
Create Incident Workspace 10
2.2 Contact Management 21
2.2.1 Create Contact Workspace 21
2.3 Profiles 26
2.4 Staff Accounts 27
2.5 Reports & Dashboards 30

2.5.1 CRT-Manager Navigation Set 30
2.5.2 CRT-Supervisor Navigation Set 38
2.5.3 CRT-Representative Navigation Set 45

1 INTRODUCTION

1.1 Purpose of Functional Solution Definition

The purpose of the Functional Solution Definition document is to define and illustrate the functional requirements that Covered CA – CRT Oracle Service Cloud should support. The document also serves as a reference and communication guide for the scope and direction of the implementation that [redacted] is completing for Covered CA – CRT. The goal is for both Covered CA – CRT and [redacted] to review and gain agreement on how Administrators, Managers, Analysts, and contacts are going to use the Service Cloud application and to make sure the use cases and requirements are defined up-front so the application can be configured and tested properly.

1.2 Project Overview and Scope

Covered CA has purchased licenses and an Oracle Service Cloud site and interface with the service modules enabled. Covered CA has contracted [redacted] to complete a solution definition and solution development for implementation of Incident Management for their Oracle Service Cloud solution, CRT team. The following modules are in scope for implementation:

- Incident/Email Management
- Service Analytics

2 REQUIREMENTS

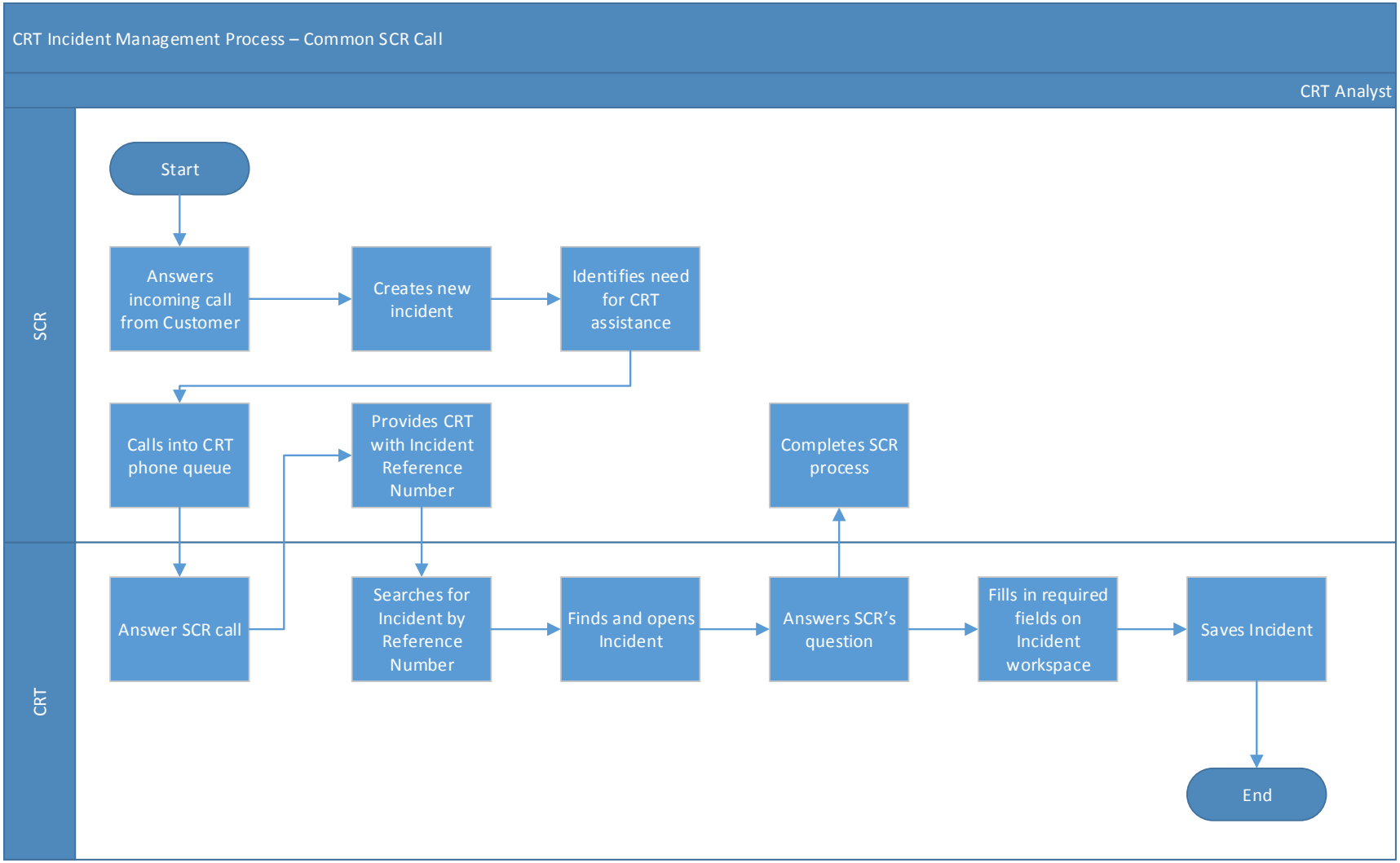
2.1 Incident Management

2.1.1 Incident Management Process

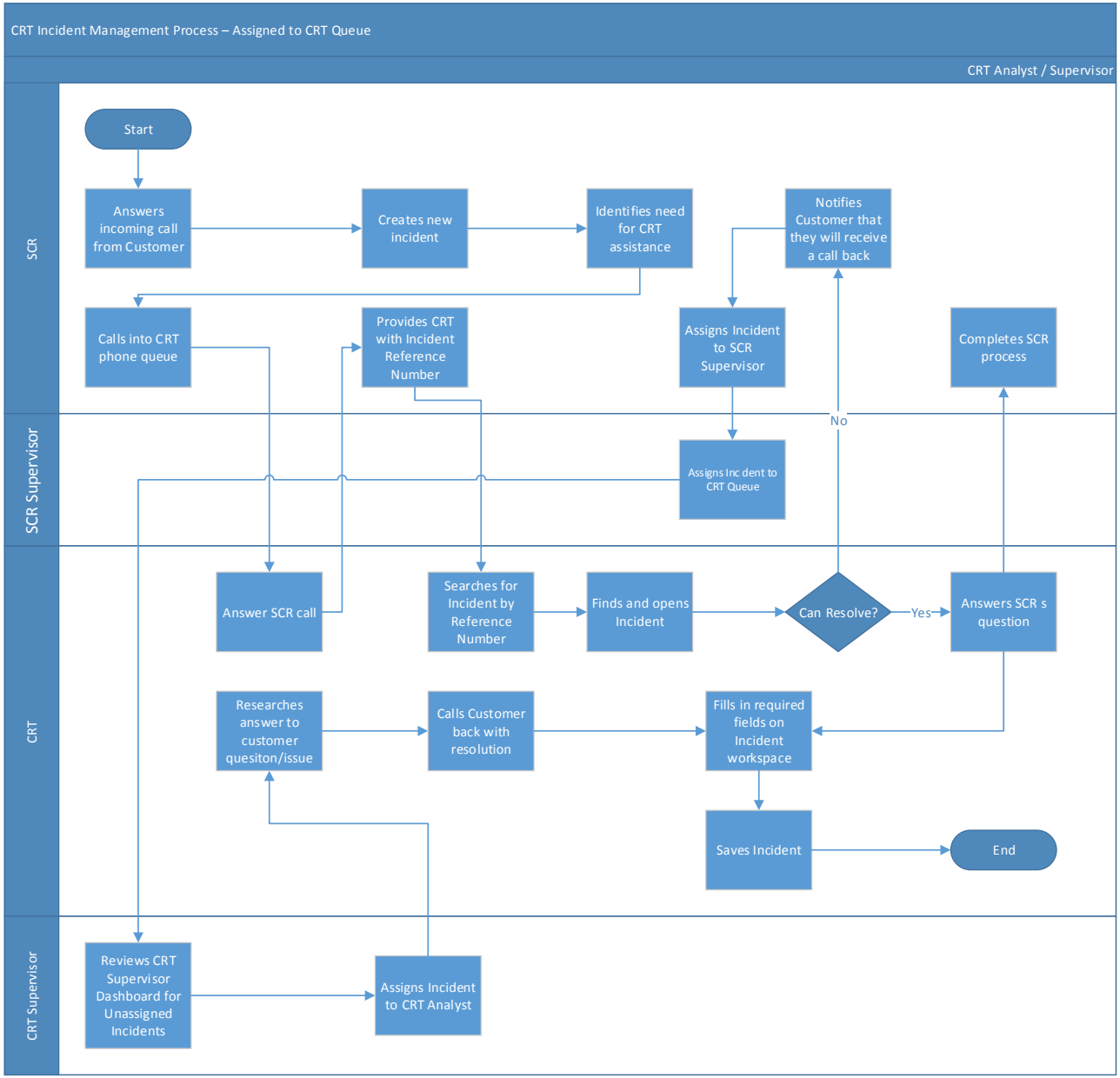
An Incident is any question or request for help submitted by a contact on any available channel. Covered CA – CRT will be tracking all incoming and outgoing customer phone communication via incidents in Oracle Service Cloud (CRM). Covered CA – CRT will receive incidents via the CRT queue from other internal groups, mainly SCRs, as well as have the ability to create new incidents themselves. In other cases, CRT will receive an incoming call from an SCR with a request for assistance with existing incidents. In this case, incidents will remain assigned to the SCR and the CRT Representative will update CRT-specific fields. Each incident will be associated to a unique reference number. Incident management functions are dependent on how analysts handle key incident details. Therefore, all incidents, when opened for editing or created, will start with a focus on the private note in the messages tab. The private note will be pre-populated with a standard template that will be provided and maintained

by Covered CA. CRT will conduct research according to defined business processes and enter a private note in the messages tab. When the analyst is satisfied with his response he will close the incident and communicate the resolution back to the primary contact using the desired communication method. When an incident is transferred to the CRT Queue then a CRT Supervisor will manually assign it to a CRT Representative for work. The assigned user will then see the new incident appear in their “My Inbox” view. For other cases, if the Supervisor determines that the incident should not have been transferred to CRT then the Supervisor will reassign the incident back to the supervisor of the source queue.

2.1.1.1 Use Case 1 – CRT (SCR Phone Call)



2.1.1.2 Use Case 2 – CRT (Assigned to CRT Queue)


CRT Incident Management Process – Assigned to CRT Queue
CRT Analyst / Supervisor
SCR
SCR Supervisor
CRT
CRT Supervisor
Start
Answers incoming call from Customer
Creates new incident
Identifies need for CRT assistance
Notifies Customer that they will receive a call back
Calls into CRT phone queue
Provides CRT with Incident Reference Number
Assigns Incident to SCR Supervisor
Completes SCR process
No
Assigns Inc dent to CRT Queue
Answer SCR call
Searches for Incident by Reference Number
Finds and opens Incident
Can Resolve?
Yes
Answers SCR s question
Researches answer to customer quesiton/issue
Calls Customer back with resolution
Fills in required fields on Incident workspace
Saves Incident
End
Reviews CRT Supervisor Dashboard for Unassigned Incidents
Assigns Incident to CRT Analyst

2.1.2 Channels

CRT will handles incidents incoming and outgoing via the phone channel only.

2.1.3 Internal Transfer

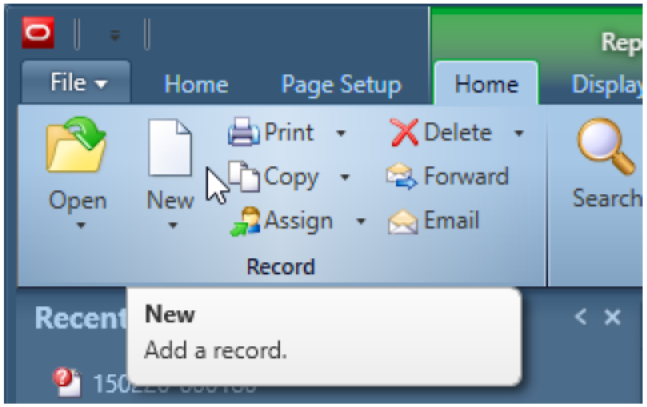
When appropriate, SCR Supervisors will assigns incidents to the CRT Queue. From there, CRT Supervisors will assign the incident to the CRT Representative for further investigation.

From	To
CRT Supervisor	CRT Representative or Other Queues
CRT Representative	CRT Supervisor or Other Queues

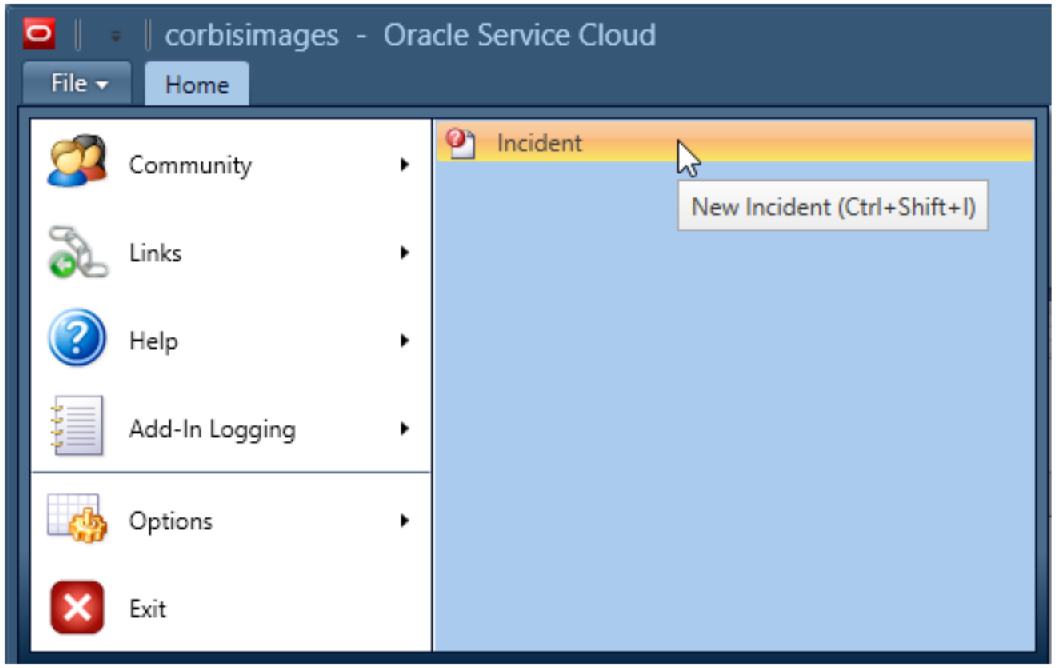
2.1.4 New Incident by CRT

At times, the CRT Team will need to create new incidents. New incidents will be created from either

1. The CRT My Inbox view by using the "New" button located in the ribbon bar:



2. Or the File Menu



2.1.5 Incident Queues

A sequence of unassigned, unresolved incidents. When an incident queue is added, it can be defined as the default queue. Incidents are added to queues automatically by business rules or manually by re-queuing and are handled in a first-in, first-out manner.

Queue Name
CRT

2.1.6 Incident Routing Rules

CRT Reps will be able to see the assigned queue from their dashboards. No auto-routing rules will be configured. SCR Supervisors will manually assign incidents to the CRT Queue. Once incidents arrive in the CRT Queue then CRT Supervisors will manually assign them to CRT Representatives.

2.1.7 Incident Statuses

The status of an incident as it moves through the system. Below are the statuses that Covered CA – CRT will utilize for tracking purposes.

Statuses	Status Definition	Profile/Role
Closed	Solved	CRT Representative, CRT Supervisor, CRT Manager
Open	Unresolved	CRT Representative, CRT Supervisor, CRT Manager
Updated	Unresolved (This status is automatically selected when an incident has been updated by the contact via an email reply). Does not apply for phase 1 or until CRT begins using email communication from CRM.	CRT Representative, CRT Supervisor, CRT Manager
CRT – In Progress	Open (Incident in-progress)	CRT Representative, CRT Supervisor, CRT Manager
Transferred	Incident transferred outside of CRT queue	CRT Supervisor, CRT Manager, CRT Representative

2.1.8 Standard Text

Text prepared in advance that can be sent to contacts when responding to incidents, appended to responses by a business rule, or sent by a representative during a chat session. Covered CA – CRT Representatives will have access to the following standard text as a default template.

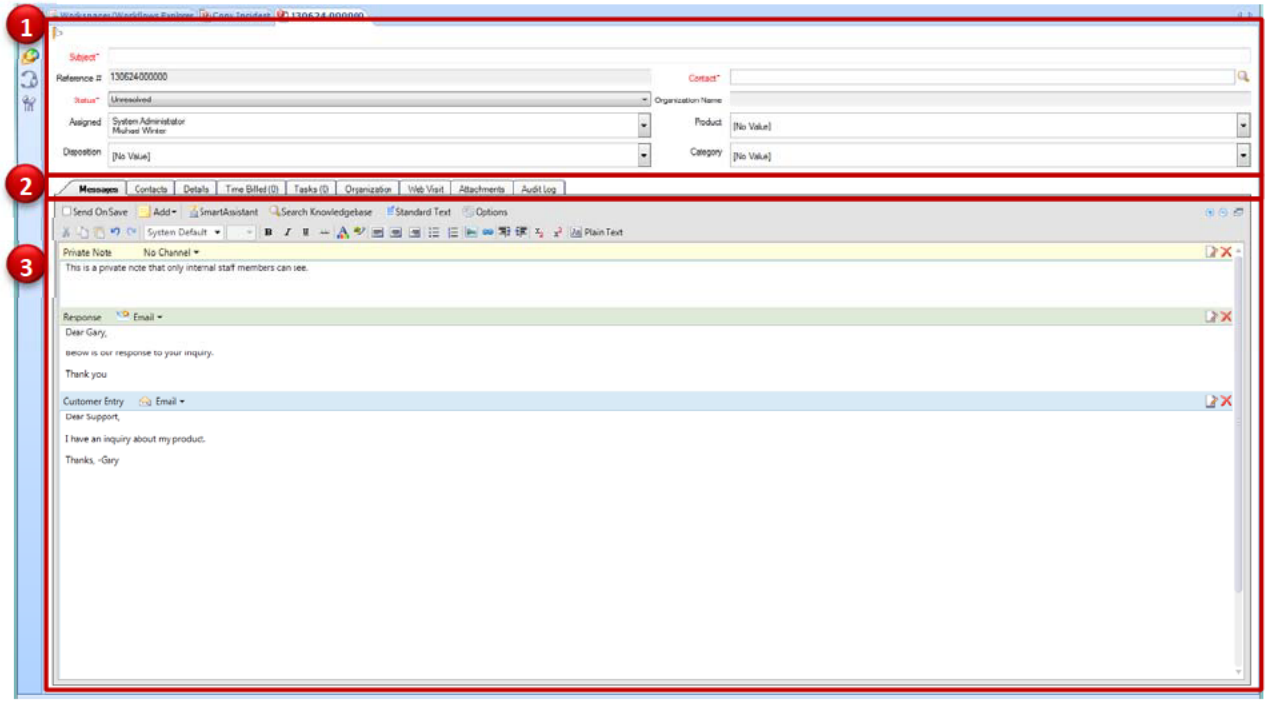
Name	Text
CRT Private Notes Template	1. Reason for Call: 2. Actions Taken:

2.1.9 Response Requirements

The response requirements are used to measure individual performance in responding to and solving incidents and can also be used for SLAs that do not have customized response requirements. Covered CA – CRT incidents must be addressed within 72 of hours from queue escalation.

Create Incident Workspace

Workspace screens define the fields and layout that staff use when adding or editing records. The sections below define the incident workspace requirements. Below is a sample illustration of an incident workspace.



1. The top half of the workspace is commonly referred to as the summary or header section of the workspace. This is where staff members typically capture/review summary level information about the incident.
2. The bottom half is where tabs are located, which contain additional information about the Incident record.
3. The Messages tab contains the message thread, where all correspondence between the contact and staff is tracked. Staff will send and receive emails directly from the Messages tab on the incident workspace.

2.1.9.1 Incident Workspace Summary Level

The table below defines the fields on the incident workspace summary level.

Label	Description	Details	CRM Field	Behavior
Assigned	The name of the rep working the incident	Menu (OOTB Assigned field)	Incident.assigned	Optional

Label	Description	Details	CRM Field	Behavior
Date Closed	Date the incident was closed	System Generated	Incident.closed	Read-Only
Case #	This is the CalHEERS assigned number associated with the Contact.	Text Area	Contacts.HBX_CaseID (SSO$HBX_CaseID	Optional
CalHEERS Ticket#	When you encounter a CalHEERS issue when attempting to complete the documented process (RAC, Term, Term/re-enroll, reinstate, etc.), you need to submit a CalHEERS ticket.	Text Field	Incident.c$ch_ticket_no	Optional
Ticket Submitted Date	Enter the date you submitted the CalHEERS ticket	Date Field	Incident.c$ ch_ticket_sub_date	Optional
Ticket Closed Date	This is the date you get a closure date from CalHEERS, if you reopen then SAME CASE enter another entry.	Date Field	Incident.c$ ch_ticket_closed	Optional

Label	Description	Details	CRM Field	Behavior

Status	Current incident status	• Menu
		  ○ Open
		  ○ Closed
		  ○ Transfer
		  ○ CRT – In Progress
			Incident.status	• Required
				• Only Supervisors can Transfer

Contact	Primary Contact record associated to the incident	Lookup	Incident.c_id	Required
Subject	Incident Subject	Text Field	Incident.subject	Required
Queue	Incident Queue	• Menu • Queue value will be set to "CRT" if incident is brand new	Incident.queue	• Required • Default to CRT Queue for new incidents
Category/ Type	SCR incident categories	Menu	Incident.CatID	Read-Only

CRT – Incident Type	Custom CRT incident types	• Menu
		  ○ Cold Transfer
		  ○ Consult
		  ○ Warm Transfer
		  ○ New - Aged
		  ○ New by CRT
			Incident.c$crt_call_type	Required

CRT – Call Reason	Custom CRT Incident Call Reason	• Menu o 1095 Not Received o 1095 Discrepancy o 1095 General o ACA Question o Appeal/Complaint o Application Assistance o APTC o Authentication Issue o Back Office Escalation o Billing Questions/ Issues o Change Effective Date o Choose a Plan o CIA/CEC o Citizenship/Immigration o Eligibility Results o Enrollment Status o Escalated/Request for Supervisor o Income Requirements/Reporting o Manual Verification o Medi-Cal o Password Reset o Plan Question o Premium Questions/Issue o Report a Change o Retro-Termination o RIDP o SCR Not Prepared o Special Enrollment o System Errors o User Account Assistance	Incident.c$crt_call_reason	Required

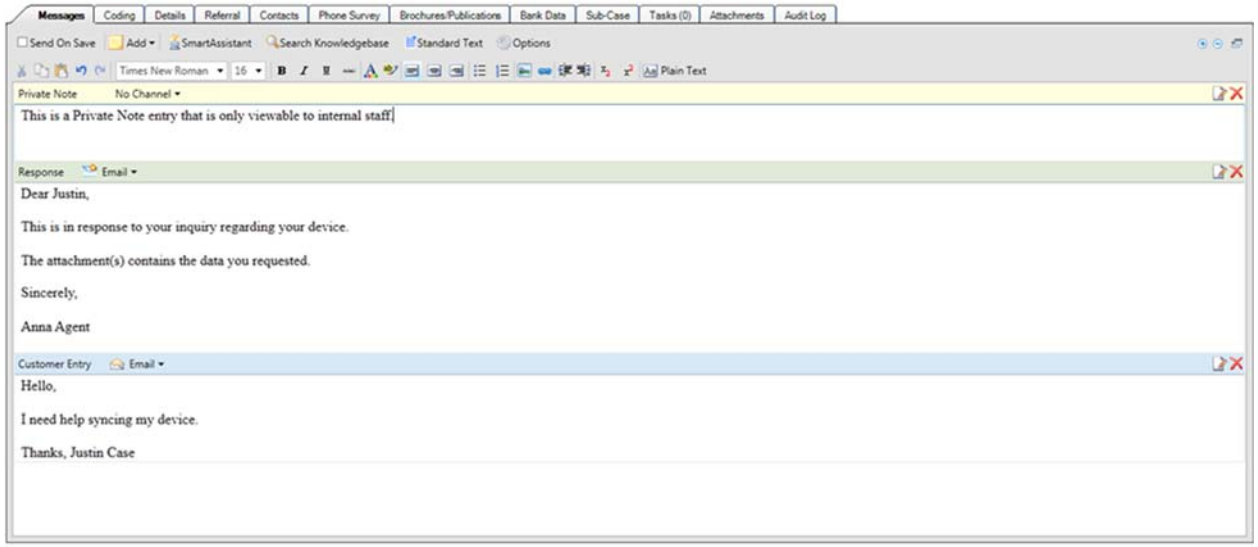
Label	Description	Details	CRM Field	Behavior

CRT – Call Resolution	Custom CRT Incident Resolution Type	• Menu o 1095 Dispute Form o 1095 RAC Added o 1095 Guidance Added Feb 3 o Advise SCR to Create Help Desk Ticket o APTC Added o Data Entry Correction o EC Referral o Effective Date Change o Eligibility Results o Escalated Call to Supervisor o Health Plan Hotline Referral o Hold Time Exceeded o Manual Verification Completed o Not Eligible for Effective Date Change o Not Resolved-Call Dropped o Re-determined Eligibility o Redirected to CEC/CIA o Redirected to Medi-Cal o Redirected to QHP o Referred back to Supervisor o Referred to Task Guide/Kbase o Reinstated o Retro-Term Approved o Retro-Term Denied	Incident.c$crt_call_resolution	Required

Label	Description	Details	CRM Field	Behavior
		○ RIDP ○ SCR Not Prepared ○ Special Enrollment - Not Eligible ○ Special Enrollment - Request Submitted ○ Submitted Help Desk Ticket ○ Used Approved Resources ○ User Account Assistance		
Phone Number	Contact Phone Number	Contact record's home/primary phone number	Contact.ph_home	Required (may become optional)
Date Escalated to CRT	Date in which an incident entered to CRT Queue	Date/Time Field	Incident.c$crt_date_escalated	Read-Only
Date Resolved	Date CRT resolved issue – Workspace rule will set this field automatically.	Date/Time Field	Incident.c$crt_date_resolved	Read-Only
CRT - Follow-Up	Date for Contact follow-up by rep	Date/Time Field	Incident.c$crt_follow_up_date	Optional

2.1.9.2 Incident Workspace Messages Tab

The messages tab contains functionality that enables staff members to document details about the incident, send an email response to the contact related to the incident, or add a private note for internal use only. The image below is a sample illustration of the messages tab.

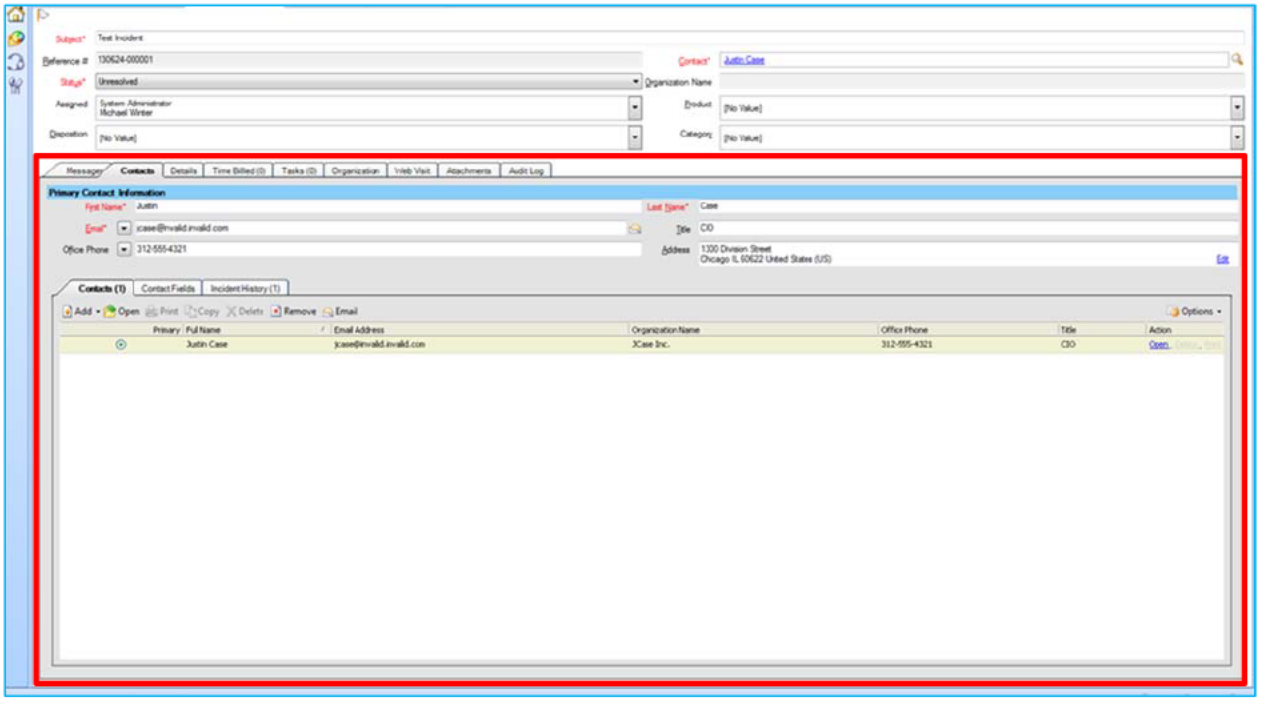


The following standard text will be inserted as a private note every time a CRT member opens an incident:

1. Reason for Call:
2. Actions Taken:

2.1.9.3 Incident Workspace Contacts Tab

Below is a sample illustration of the incident workspace contacts tab. This tab is where staff members can view detailed information about the primary contact, as well as any other contacts associated with the incident.

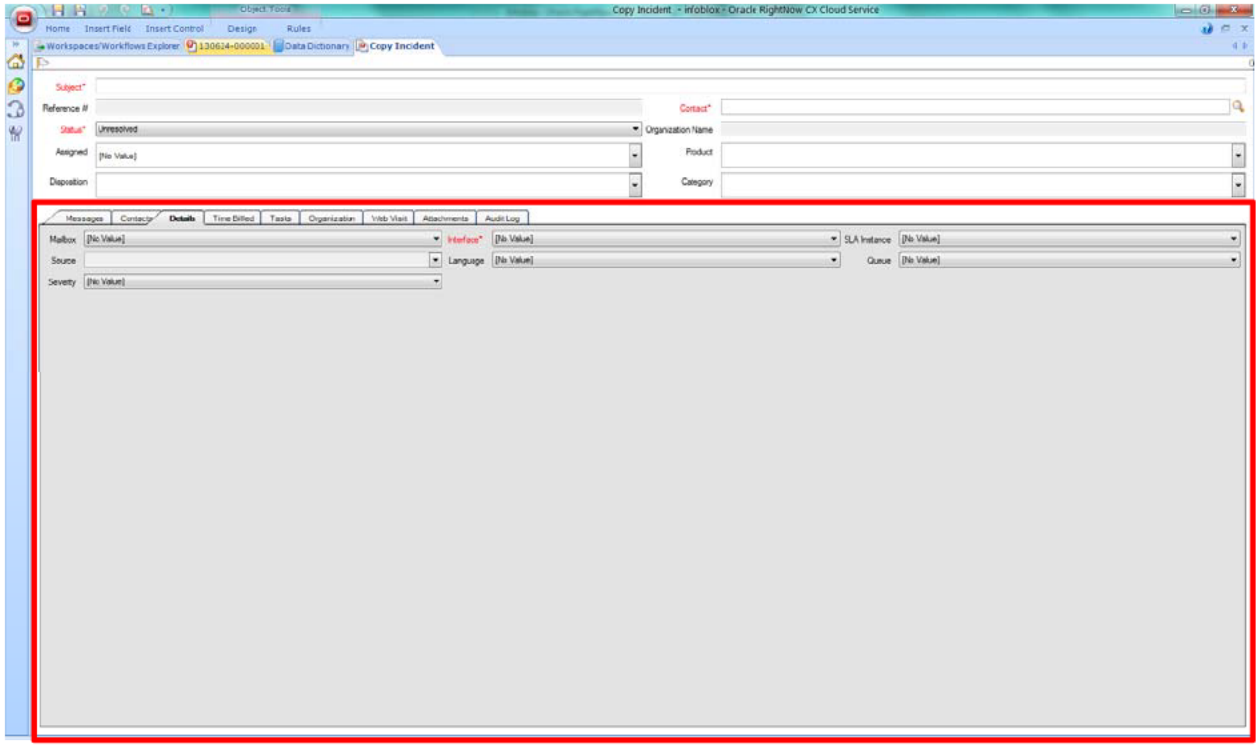


The table below defines the fields on the incident workspace contacts tab.

Label	Notes	Behavior
First Name	The first name of the primary contact on the incident	• Read-only • Optional
Last Name	The last name of the primary contact on the incident	• Read-only • Optional
Email Address	The email address for the contact	• Read-only • Optional
Phone Numbers	All Phone numbers	• Optional

2.1.9.4 Incident Workspace Details Tab

Below is a sample illustration of the incident workspace details tab.



The table below defines the fields on the incident workspace details tab.

Label	Notes	Behavior
Date Created	Date and time incident was created	
Date Initial Solution Response	Date and time the initial solved response was sent to the contact	
Date Last Responded	Date and time of CRT's last email response to the contact	
Date Last Updated	Date and time the incident was last updated	

Label	Notes	Behavior
Date Closed	Date and time the incident status was set to Solved	

2.1.9.5 Incident Workspace Attachments Tab

Enables staff members to attach files to the incident. All out of the box functionality will remain for this incident workspace tab.

2.1.9.6 Incident Workspace Audit Log Tab

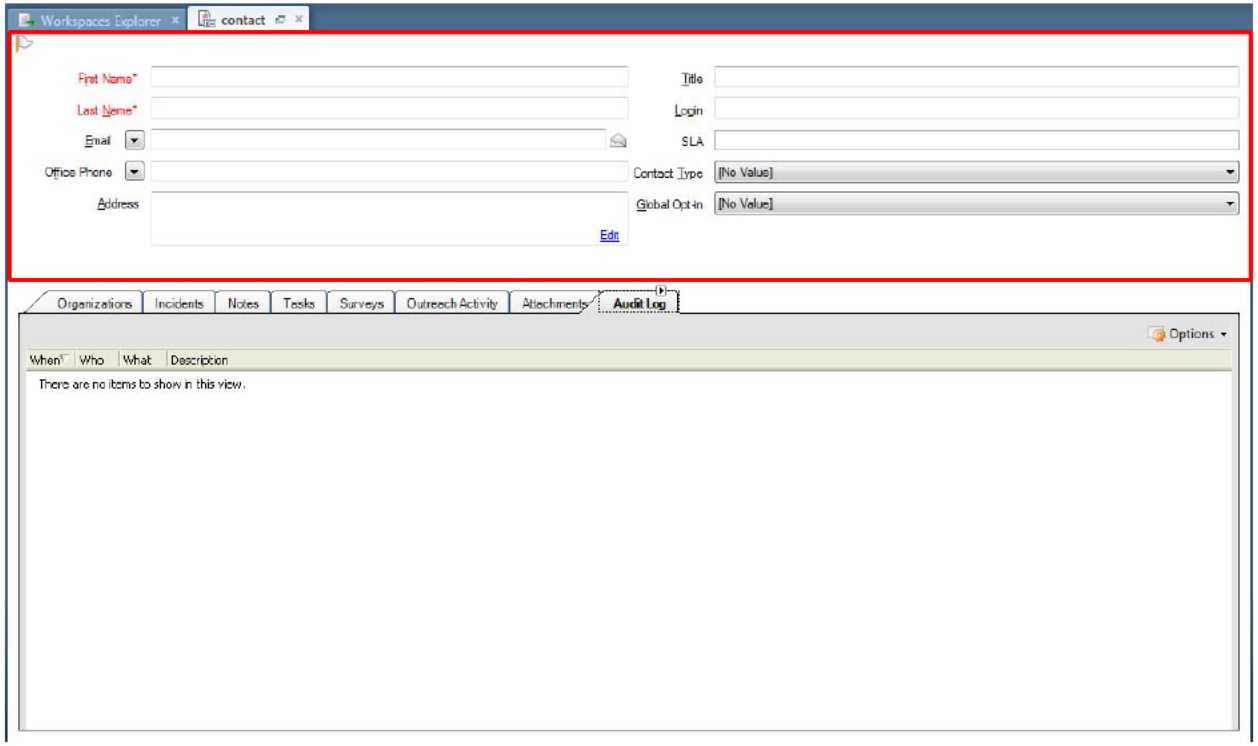
Displays the history of transactions that have taken place on the incident record. All out of the box functionality will remain for this incident workspace tab.

2.2 Contact Management

A contact is any individual with a contact record in the database. Contact records can be added by staff members on the Service Console or automatically by the system when contacts submit an incoming email.

2.2.1 Create Contact Workspace

Workspace screens define the fields and layout that staff use when adding or editing records. The sections below define the contact workspace requirements. Below is a sample illustration of a contact workspace and does not represent the to-be configured solution.



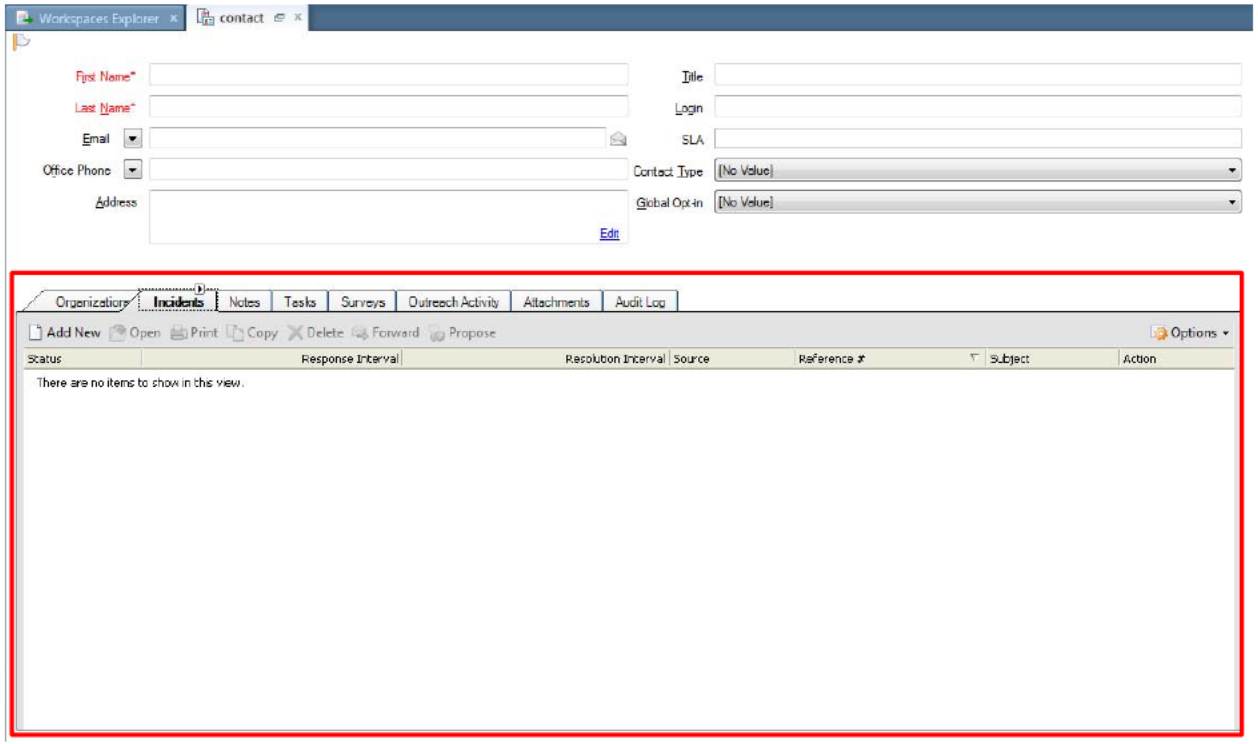
2.2.1.1 Contact Workspace Summary Level

The following fields will be configured in the summary level of the incident workspace.

Label	Notes	Behavior
First Name	Contact's First Name	Required
Last Name	Contact's Last Name	Required
Email	Not required on analyst workspace.	Optional
Phone	Contact Phone Numbers	Optional
Case ID	Contact's Case ID	Optional
Address	Contact's Address	Optional

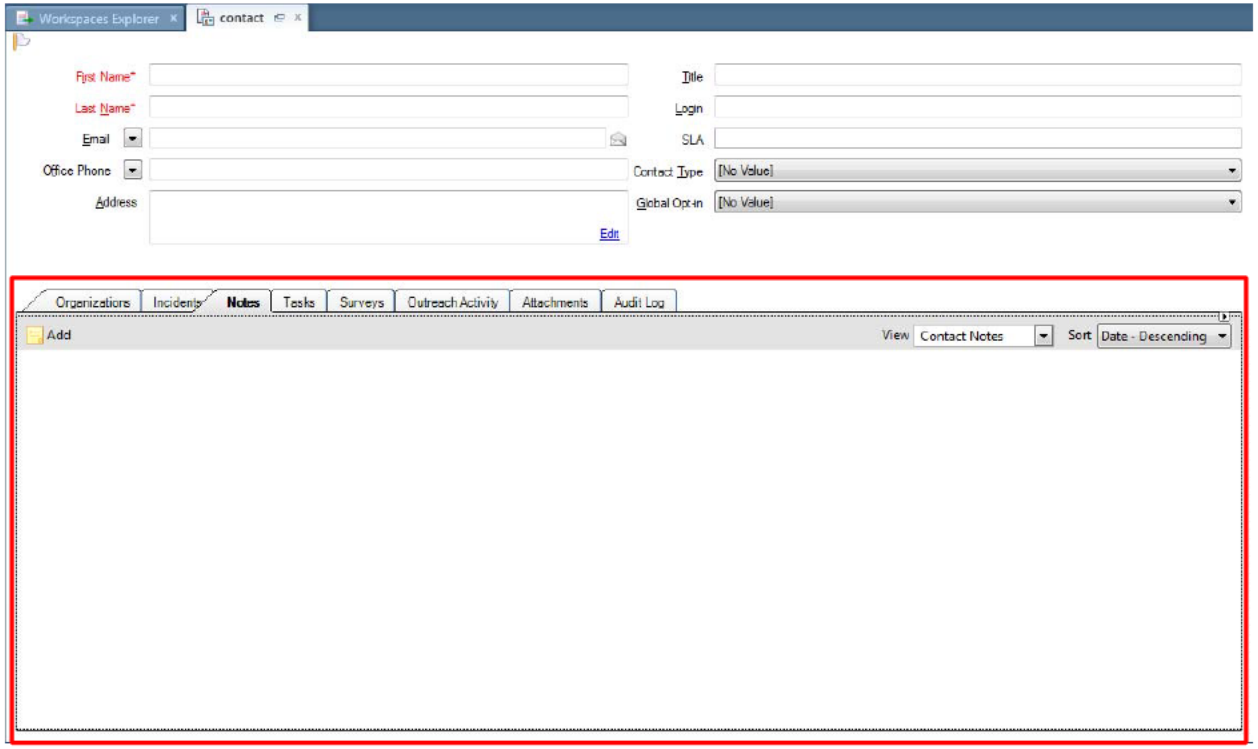
2.2.1.2 Contact Workspace Incidents Tab

Provides a detailed list of the contact's incident history by listing all incidents associated with the contact. This tab will be modified so that it displays incidents for contacts who are associated to an incident but are not the primary contact of the incident.



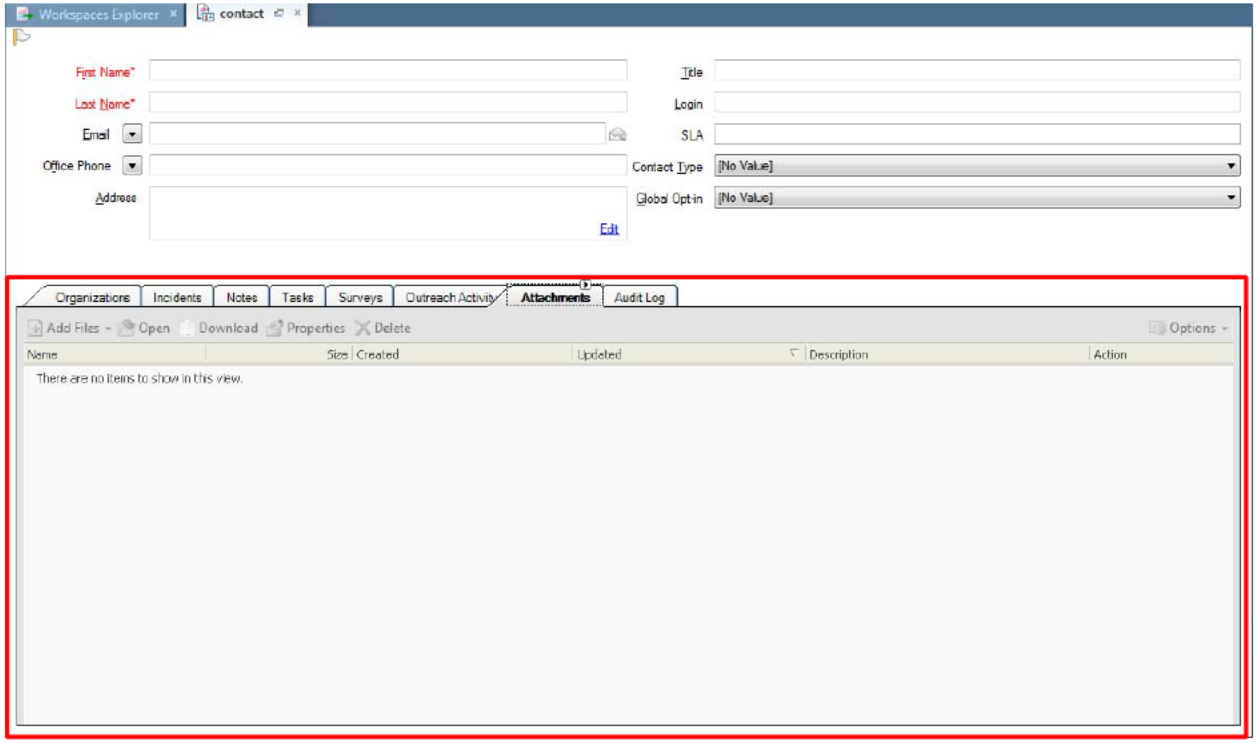
2.2.1.3 Contact Workspace Notes Tab

Enables staff members to create notes. All out of the box functionality will remain for this contact workspace tab.



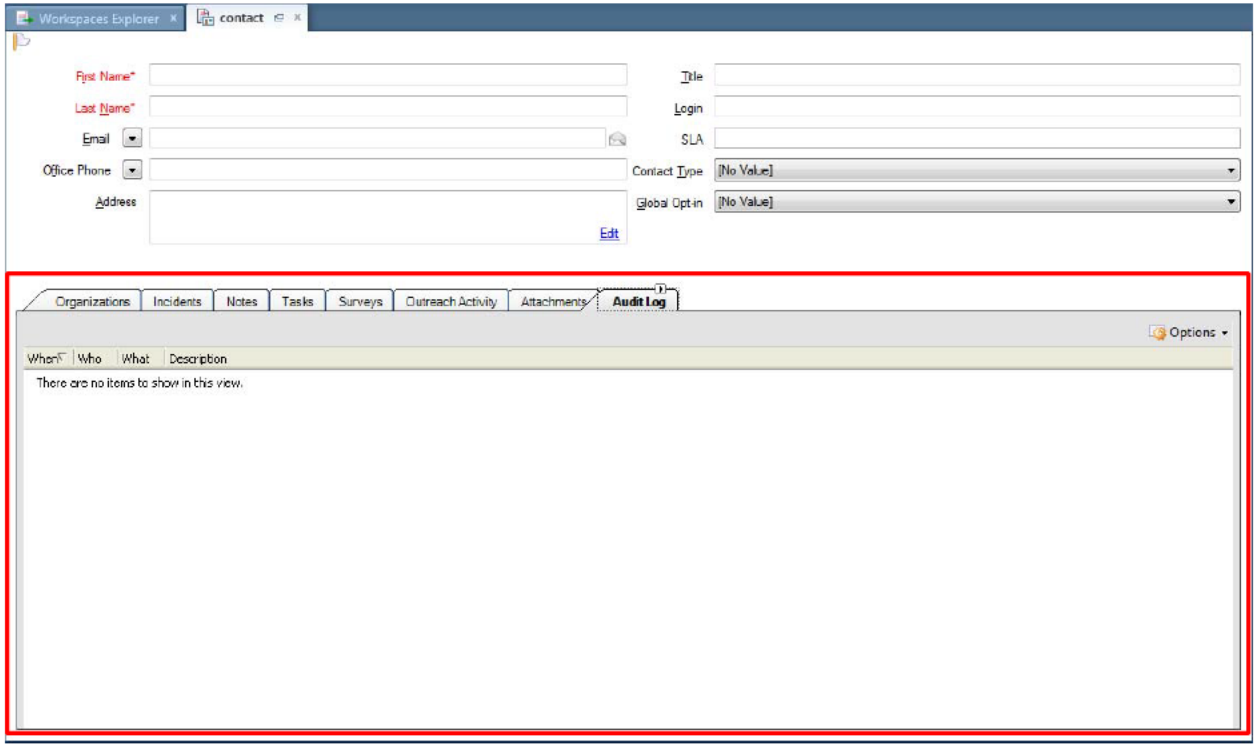
2.2.1.4 Contact Workspace Attachments Tab

Enables staff members to attach files to the contact record. All out of the box functionality will remain for this contact workspace tab.



2.2.1.5 Contact Workspace Audit Log Tab

Displays the history of transactions that have taken place on the contact record. All out of the box functionality will remain for this contact workspace tab.



2.3 Profiles

A profile is the mechanism for controlling access to administration functions and for assigning staff member's specific permissions, default workspaces, a default navigation set, and report access. The following profiles will be created by [redacted]

Profile Name	Assigned Queues to pull incidents	Pull Policy	Description
CRT Representative	CRT	- Manual Assignment by Supervisor - Can self-assign incident while on phone with SCR	Access to Incident Management
CRT Supervisor	CRT	Manual Assignment to self or CRT	Access to Incident Management
CRT Manager	CRT	Manual Assignment to self or CRT	Access to Incident Management

2.4 Staff Accounts

A staff member authorized to access an Oracle Service Cloud application, including user name, password, profile, group assignment, and email information. The below table indicates all of the CRT CRM users and the profiles that they will be assigned to.

[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]
	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]
	[redacted]	[redacted]
	[redacted]	[redacted]
	[redacted]	[redacted]
	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]
	[redacted]	[redacted]
	[redacted]	[redacted]
	[redacted]	[redacted]
	[redacted]	[redacted]
	[redacted]	[redacted]
	[redacted]	[redacted]
	[redacted]	[redacted]
	[redacted]	[redacted]
	[redacted]	[redacted]
	[redacted]	[redacted]
	[redacted]	[redacted]
	[redacted]	[redacted]
	[redacted]	[redacted]

2.5 Reports & Dashboards

2.5.1 CRT-Manager Navigation Set

Role	Navigation Button	Item Name	Item Description
Manager	Home	Manager Dashboard	This dashboard displays all open incidents assigned to each queue. Reps will use this dashboard to find and work on incidents. Incidents will be color coded red after open and unassigned for more 3+ calendar days day. - Dashboard Includes: o All Unassigned Incidents by Queue o All Assigned Incidents by Queue o My Inbox
		Notifications	A list of all system generated notifications created for the logged in user.
	Analytics	All Incidents touched by CRT	A list of all incidents that were assigned to the CRT queue through time.
		Incident Aging Report	A list of all incidents currently assigned to CRT sorted by Age. Row text will turn red when incident age exceeds 3 calendar days after incidents assigned AND in Open status.

		Service Request Statistics by Category Dashboard	A dashboard comprised of the following reports where Category = CRT Call Type - Incident Activity by Category Displays statistics about incidents associated with a specified date range. Statistics include the number of unassigned, assigned, and resolved incidents, and the number of responses, the RPI per incident, and the number of incidents that were re-assigned. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incident Effectiveness by Category Displays statistics about incidents associated with a certain range of contacts or organizations, grouped by product or category. Statistics include the number of incidents, the RPA, FCRR, number of responses per product or category, and number of solves per product or category. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incidents Created by Category

			Displays all incidents created in a specific time period and groups them by category. You can then drill down to the sub-category level or products within categories. This report is useful for determining the categories most often used when end-users submit an incident. This report also displays all the incidents created within the specified time period sorted by product. This report is useful for determining what products are generating the most questions and what those questions are.

		Service Request Statistics Dashboard	A dashboard comprised of the following reports: - Incident Activity Displays statistics about incidents associated with a specified date range. Statistics include the number of unassigned, assigned, and resolved incidents, and the number of responses, the RPI per incident, and the number of incidents that were re-assigned. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incident Effectiveness Displays statistics about incidents associated with a certain range of contacts or organizations, grouped by product or category. Statistics include the number of incidents, the RPA, FCRR, number of responses per product or category, and number of solves per product or category. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incident Creation Rate

			Displays statistics of new incidents created per hour of day, day of week, day of month, or month of year. The Incident Creation Rate report is useful for calculating an incident-per-hour/day/month ratio and comparing it against other time periods.
		Agent Performance	Displays statistics about the number of incidents worked on during the specified time period by a staff member or group, and the average time spent working on the incidents. Use this report to determine the work efficiency of staff members and identify the average response time or solution time for each staff member.
		Agent Performance – Incidents not touched	Same as Agent Performance only this shows incidents that have not been edited by the assigned user.
		CRT Queue Activity	Reports on how many incidents are in each queue during a specified date range. You can view how many were assigned, resolved, and the number of responses for each incident, all grouped by queue.
		CRT Queue Transitions	The report provides information about the number of times incidents transitioned between queues.

		CRT Agent Activity	Displays statistics about how agents have handled incidents during a specified time period. Included are statistics on how many incidents agents had assigned to them, how many were resolved, how many responses agents made, and their responses per assignment (RPA). Incidents are included in this report if they were initially assigned, responded to or reassigned during the date range specified in the report's parameters and were assigned to a staff member. Only incidents that were responded to by the agent are included in the report. Incidents that were assigned to the agent, but the agent did not send a response will not be counted.
		Group Activity	Displays by group the statistics about how agents have handled incidents during a specified time period. Included are statistics on how many incidents agents had assigned to them, how many were resolved, how many responses agents made, and their responses per assignment (RPA). Incidents are included in this report if they were initially assigned, responded to or reassigned during the date range specified in the report's parameters and were assigned to a staff member. Only incidents that were responded to by the agent are included in the report. Incidents that were assigned to the agent, but the agent did not send a response will not be counted.
		CRT Incidents by Status	Displays all incidents assigned to CRT by their Status.
		CRT Incidents by Type	Displays all incidents assigned to the CRT Queue by their CRT Type.

		CRT Incidents by Call Reason	Displays all incidents assigned to the CRT Queue by the CRT Reason.
		CRT Incidents by Call Resolution	Displays all incidents assigned to CRT Queue by the Call Resolution.
		CRT Representative by Type	Displays all incidents assigned by Rep and by Type.
		CRT Representative by Call Reason	Displays all incidents assigned by Rep and by Call Reason.
		CRT Incidents by Call Reason by Call Resolution	Displays all incidents assigned to CRT by Call Reason and by Call Resolution.
		CalHEERS Ticket Data	Displays all incidents that contain CalHEERS Ticket data.
		Reports Explorer	Access to all reports (800+)
	Contacts	All Contacts	The All Contacts report lists all the contacts in your database. You can filter the contacts or search for specific contact records. Each contact's email address, last name, first name, Phone number, Case ID.
	Quick Search	Incident Quick Search	Quickly find an incident by reference number, CalHEERS Ticket Number, First Name, Last Name, Case ID, Email, Phone, Last 4 of SSN.
		Contact Quick Search	Quickly find a contact record First name, Last name, Email address, Phone, Case ID, Phone, Last 4 of SSN.
		Answer Quick Search	Quickly find an Answer by phrase or ID.

2.5.2 CRT-Supervisor Navigation Set

Role	Navigation Button	Item Name	Item Description
Supervisor	Home	Supervisor Dashboard	This dashboard displays all open incidents assigned to each queue. Reps will use this dashboard to find and work on incidents. Incidents will be color coded red after open and unassigned for more 3+ calendar days day. - Dashboard Includes: o All Unassigned Incidents by Queue o All Assigned Incidents by Queue o My Inbox
		Notifications	A list of all system generated notifications created for the logged in user.
	Analytics	All Incidents touched by CRT	A list of all incidents that were assigned to the EC queue through time.
		Incident Aging Report	A list of all incidents currently assigned to CRT sorted by Age. Row text will turn red when incident age exceeds 3 calendar days after incidents assigned AND in Open status.

		Service Request Statistics by Category Dashboard	A dashboard comprised of the following reports where Category = CRT Call Type - Incident Activity by Category Displays statistics about incidents associated with a specified date range. Statistics include the number of unassigned, assigned, and resolved incidents, and the number of responses, the RPI per incident, and the number of incidents that were re-assigned. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incident Effectiveness by Category Displays statistics about incidents associated with a certain range of contacts or organizations, grouped by product or category. Statistics include the number of incidents, the RPA, FCRR, number of responses per product or category, and number of solves per product or category. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incidents Created by Category

			Displays all incidents created in a specific time period and groups them by category. You can then drill down to the sub-category level or products within categories. This report is useful for determining the categories most often used when end-users submit an incident. This report also displays all the incidents created within the specified time period sorted by product. This report is useful for determining what products are generating the most questions and what those questions are.

		Service Request Statistics Dashboard	A dashboard comprised of the following reports: - Incident Activity Displays statistics about incidents associated with a specified date range. Statistics include the number of unassigned, assigned, and resolved incidents, and the number of responses, the RPI per incident, and the number of incidents that were re-assigned. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incident Effectiveness Displays statistics about incidents associated with a certain range of contacts or organizations, grouped by product or category. Statistics include the number of incidents, the RPA, FCRR, number of responses per product or category, and number of solves per product or category. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incident Creation Rate

			Displays statistics of new incidents created per hour of day, day of week, day of month, or month of year. The Incident Creation Rate report is useful for calculating an incident-per-hour/day/month ratio and comparing it against other time periods.
		Agent Performance	Displays statistics about the number of incidents worked on during the specified time period by a staff member or group, and the average time spent working on the incidents. Use this report to determine the work efficiency of staff members and identify the average response time or solution time for each staff member.
		Agent Performance – Incidents not touched	Same as Agent Performance only this shows incidents that have not been edited by the assigned user.
		CRT Queue Activity	Reports on how many incidents are in each queue during a specified date range. You can view how many were assigned, resolved, and the number of responses for each incident, all grouped by queue.
		CRT Queue Transitions	The report provides information about the number of times incidents transitioned between queues.

		CRT Agent Activity	Displays statistics about how agents have handled incidents during a specified time period. Included are statistics on how many incidents agents had assigned to them, how many were resolved, how many responses agents made, and their responses per assignment (RPA). Incidents are included in this report if they were initially assigned, responded to or reassigned during the date range specified in the report's parameters and were assigned to a staff member. Only incidents that were responded to by the agent are included in the report. Incidents that were assigned to the agent, but the agent did not send a response will not be counted.
		Group Activity	Displays by group the statistics about how agents have handled incidents during a specified time period. Included are statistics on how many incidents agents had assigned to them, how many were resolved, how many responses agents made, and their responses per assignment (RPA). Incidents are included in this report if they were initially assigned, responded to or reassigned during the date range specified in the report's parameters and were assigned to a staff member. Only incidents that were responded to by the agent are included in the report. Incidents that were assigned to the agent, but the agent did not send a response will not be counted.
		CRT Incidents by Status	Displays all incidents assigned to CRT by their Status.
		CRT Incidents by Type	Displays all incidents assigned to the CRT Queue by their CRT Type.

		CRT Incidents by Call Reason	Displays all incidents assigned to the CRT Queue by the CRT Reason.
		CRT Incidents by Call Resolution	Displays all incidents assigned to CRT Queue by the Call Resolution.
		CRT Representative by Type	Displays all incidents assigned by Rep and by Type.
		CRT Representative by Call Reason	Displays all incidents assigned by Rep and by Call Reason.
		CRT Incidents by Call Reason by Call Resolution	Displays all incidents assigned to CRT by Call Reason and by Call Resolution.
		CalHEERS Ticket Data	Displays all incidents that contain CalHEERS Ticket data.
		Reports Explorer	The All Contacts report lists all the contacts in your database. You can filter the contacts or search for specific contact records. Each contact's email address, last name, first name, and opt-in status are displayed.
	Contacts	All Contacts	The All Contacts report lists all the contacts in your database. You can filter the contacts or search for specific contact records. Each contact's email address, last name, first name, and opt-in status are displayed.
	Quick Search	Incident Search	Quickly find an incident by reference number, CalHEERS Ticket Number, First Name, Last Name, Case ID, Email, Phone, Last 4 of SSN.
		Contact Quick Search	Quickly find a contact record First name, Last name, Email address, Phone, Case ID, Phone, Last 4 of SSN.
		Answer Quick Search	Quickly find an Answer by phrase or ID.

2.5.3 CRT-Representative Navigation Set

Role	Navigation Button	Item Name	Item Description
CRT Representative	Home	My Inbox	All Incidents currently assigned to logged in user.
		Notifications	A list of all system generated notifications created for the logged in user.
	Contacts	All Contacts	The All Contacts report lists all the contacts in your database. You can filter the contacts or search for specific contact records. Each contact's email address, last name, first name, and opt-in status are displayed.
	Quick Search	Incident Search	Quickly find an incident by reference number, CalHEERS Ticket Number, First Name, Last Name, Case ID, Email, Phone, Last 4 of SSN.
		Contact Quick Search	Quickly find a contact record First name, Last name, Email address, Phone, Case ID, Phone, Last 4 of SSN.
		Answer Quick Search	Quickly find an Answer by phrase or ID.

Covered California/CRM

SHOP

Solution Design Documentation - Phase I

Version 1.x

VERSION CONTROL

Version	Change Description	Modified By	Date
1.0	Initial Draft	[redacted]	3/10/2015
1.1	Requirements change		
1.2	Requirements change		
1.3	Requirements change		
1.4	Requirements change		
1.5	Requirements change		
1.6	Change identified from Issue Log		

ASSOCIATED DOCUMENTS

Document	Description	Location
n/a		

CONTENTS

1 OVERVIEW 2
1.1 Purpose 2
1.2 Intended Audience 3
2 Foundational Workflow 3
3 SHOP 3
3.1 Use Cases 3
3.2 Profiles 5
3.3 Navigation Sets 6
3.4 Staff Accounts 7
3.5 Workspaces 9
3.5.1 Workspace layouts 9
3.6 Workspace Rules 12
3.7 SHOP Reports 14
4 Site-Wide Configuration 14
4.1 Products, Categories and Dispositions 14
4.1.1 SHOP Specific Products (GUI label: Role) 14
4.1.2 SHOP Program Types 14
4.1.3 Status 15
4.1.4 Categories (GUI label: Call Types) 15
4.1.5 Dispositions (GUI label: Resolution) 17
4.1.6 Queues 18
4.2 Site Configuration 18
4.2.1 Mailboxes & Standard Text Auto-Responders 18
5 Appendix A – workspaces 28
5.1 Incident Workspace Screenshots 28

1 OVERVIEW

1.1 Purpose

The purpose of the Functional Solution Definition document is to define and illustrate the functional requirements that Covered CA – SCR Oracle Service Cloud or "CRM" should support. The document also

serves as a reference and communication guide for the scope and direction of the implementation that Covered CA HQ I.T. (CCIT) is completing for SHOP CRM. The goal is for both SHOP business users and CCIT to review and gain agreement on how Administrators, Managers, SCRs, and contacts are going to use the Service Cloud application and to make sure the use cases and requirements are defined up-front so the application can be configured and tested properly.

1.2 Intended Audience

Small Business Marketplace business users (SCRs, Tier 2 Support and Managers)

2 FOUNDATIONAL WORKFLOW

An analyst will create an incident. Depending on the issue, the analyst will either resolve the issue or escalate for additional support within Covered California. The workflow for most business units is as follows:

1. The analyst opens a new incident
2. Workflow forces the analyst to select a contact from the Oracle Service Cloud application (CRM)
3. Once a contact is selected a new incident opens with the contact prepopulated
4. The analyst captures notes, sets a Type and either processes the incident or re-assigns the incident to another business unit.

3 SHOP

3.1 Use Cases

Agent calling about client

- Agent calls 800#
- SCR searches for Agent's Contact record and creates Incident on the most appropriate contact record
    - If no contact exists, then SCR creates a new contact record
- Agent asks questions about clients application, enrollment, eligibility
- SCR answers questions
- Call ends
- SCR wraps up incident notes
- Incident closed

Transfer to Individual Support Line

- Consumer calls 800#
- SCR identifies caller as a consumer not an agent

- SCR transfer call to individual support line
- SCR creates, completes notes
- Save & Close

Transfer to specific agent

- SCR transfer call to specific SHOP SCR or Mgr
- SCR creates, completes notes, selects Transferred status, selects Assigned To
- Save & Close

Escalated to Manager

- SCR creates, completes notes, selects Escalated status, selects Assigned To
- Save & Close

Email

- Agent emails agents@covered.ca.gov
- Email is assigned to Email Team SCR
- SCR searches for Agent's Contact record and creates Incident on the most appropriate contact record
    - If no contact exists, then SCR creates a new contact record
- SCR responds to agents email via CRM
- SCR wraps up incident notes
- Save & Close

*Note: RightNow CRM will create a new incident when email is received

Transfer to another support queue

- Agent calls 800#
- SCR searches for Agent's Contact record and creates Incident on the most appropriate contact record
    - If no contact exists, then SCR creates a new contact record
- Agent asks questions about LMS
- SCR transfers incident to LMS support queue
- Call ends
- From LMS Queue, the LMS support team member addresses issue in the incident
- LMS support team follows up with the Agent as needed
- Save & Close

Ticket Request

- Agent calls 800#
- SCR searches for Agent's Contact record and creates Incident on the most appropriate contact record
    - If no contact exists, then SCR creates a new contact record
- Agent asks about error messages
- SCR creates inciden, opens a help desk ticket with CalHEERs, and selects call type "Help Desk Ticket Submitted"
- Call ends
- SCR wraps up incident private notes
- Incident remains open and assigned to SCR
- SCR follows up with the Agent once there is a help desk resolution
    - The resolution is typically emailed from CRM message Send on Save
- Save & Close

3.2 Profiles

SHOP requested 7 profiles. For phase 1 these have been merged into 3 profiles. The management profile has additional reporting requirements and utilizes a different navigation set. The profiles are as follows:

SHOP Proposed Profiles	Phase I Profiles
SHOP – COBRA Rep SHOP – E&E Rep SHOP – Financial Mgmt. Rep	SHOP / Agent Tier 1
	SHOP / Agent Tier 2
SHOP – E&E Mgr SHOP – Financial Mgmt. Mgr SHOP – Director	SHOP – Manager
SHOP – Knowledgebase Admin	

3.3 Navigation Sets

SHOP Mgr Navigation Set

Application Menu	Home	Incidents	Contacts
New Incident New Contact New Opportunity	SHOP My Inbox SHOP My Incidents Notifications SHOP Agent Emails SHOP Tier 2 Escalation SHOP Agent Certification SHOP COBRA SHOP Eligibility SHOP Financial Management SHOP LMS SHOP Call Center All Chats - SHOP Active Chat List Per Queue - S Chat Activity - Agent - SHOP	Incident Search SHOP Incident Search Incidents Created by Queue Incidents by Queue's Incidents with Call Types Advanced Search Chat Comments & Questions Performance Outstanding Incidents IVR Misc	SHOP Contacts Search Employer -- Employee Search Duplicate Contacts Pending Contact Merge Contact Management
Opportunities	Answers	Quick Search	Analytics
Opportunity Dashboard 2.5 MASTER Opportunity Report Assigned SCR Opportunities .SCR Opportunities with No SCR Opportunities Won SCR Opportunities Lost SCR	SHOP Knowledgebase	SHOP Incident QuickSearch Opportunity Quick Search SHOP Contact QuickSearch SHOP Answer Quick Search	Supervisor Dashboard Accounts Logged In* Reports Explorer Staff Accounts by Profile

SHOP Tier 1 Navigation Set

Application Menu	Home	Incidents	Contacts
New Incident New Contact	SHOP My Inbox SHOP My Incidents Notifications SHOP Agent Certification SHOP COBRA SHOP Eligibility SHOP Financial Management SHOP LMS	SHOP Incident Search - SCR	Employer -- Employee Search SHOP Contacts Search
Quick Search			
SHOP Contact QuickSearch SHOP Incident QuickSearch SHOP Answer Quick Search			

SHOP Tier 2 Navigation Set

Application Menu	Home	Incidents	Contacts
New Incident New Contact	SHOP My Inbox SHOP My Incidents Notifications SHOP Agent Certification SHOP COBRA SHOP Eligibility SHOP Financial Management SHOP LMS SHOP Agent Emails SHOP Tier 2 Escalation	SHOP Incident Search - SCR	Employer -- Employee Search SHOP Contacts Search
Quick Search			
SHOP Contact QuickSearch SHOP Incident QuickSearch SHOP Answer Quick Search			

3.4 Staff Accounts

Last Name	First Name	Email	Group	Profile
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
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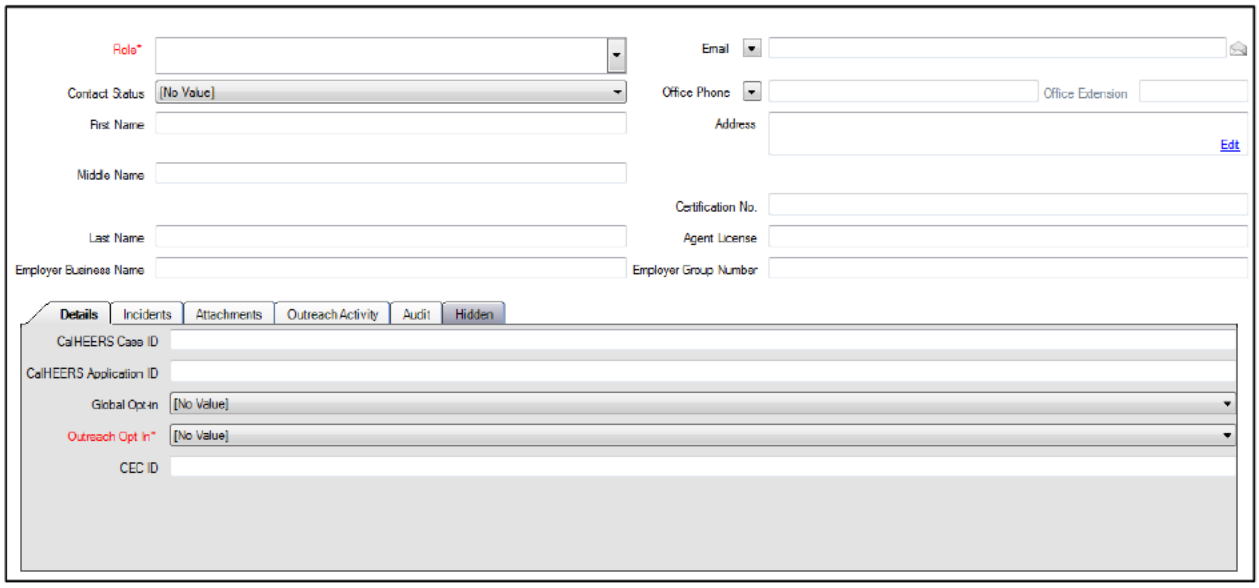
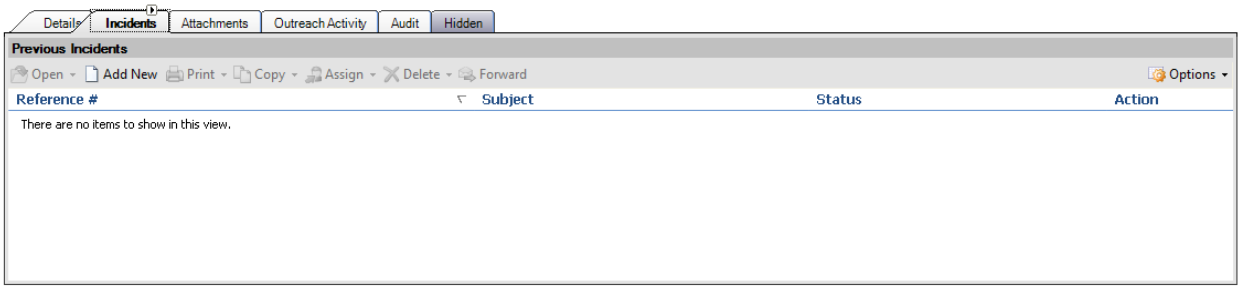
3.5 Workspaces

3.5.1 Workspace layouts

Contact Workspace

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Incidents
Attachments
Outreach Activity
Audit
Hidden
Previous Incidents
Open
Add New
Print
Copy
Assign
Delete
Forward
Options
Reference #
Subject
Status
Action
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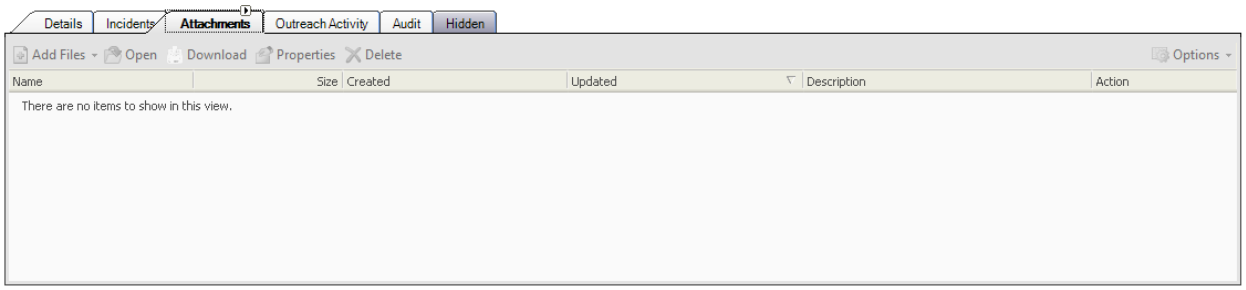
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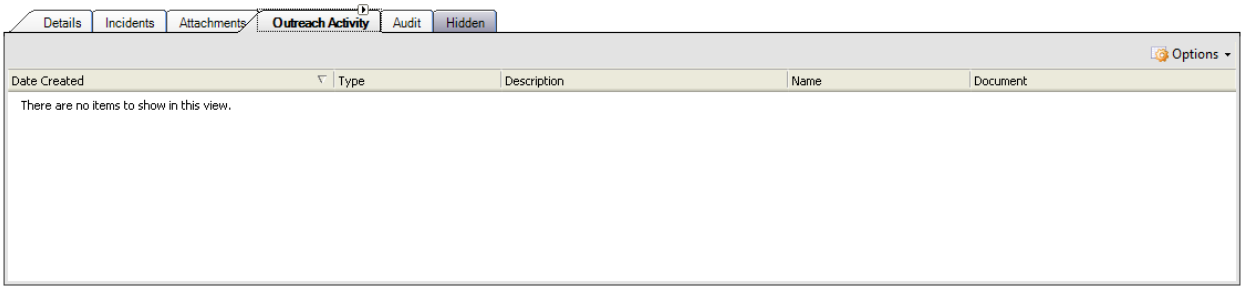
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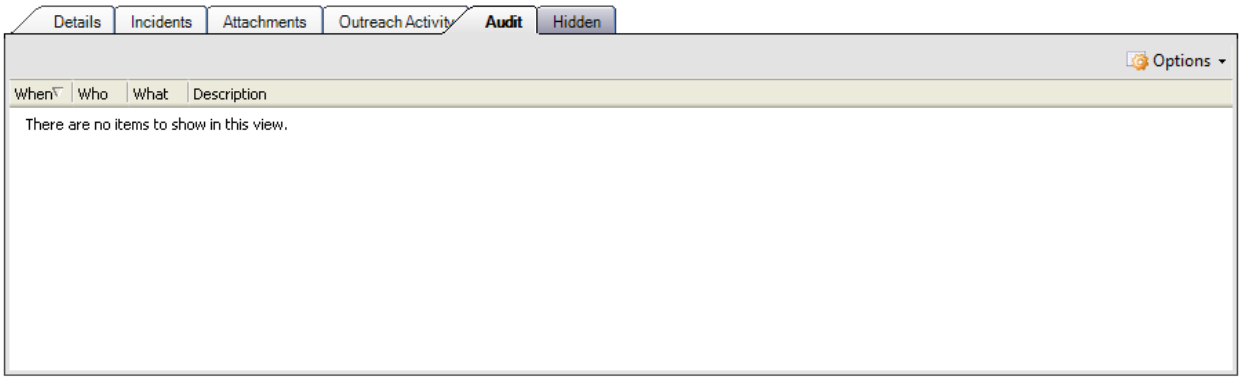
Details
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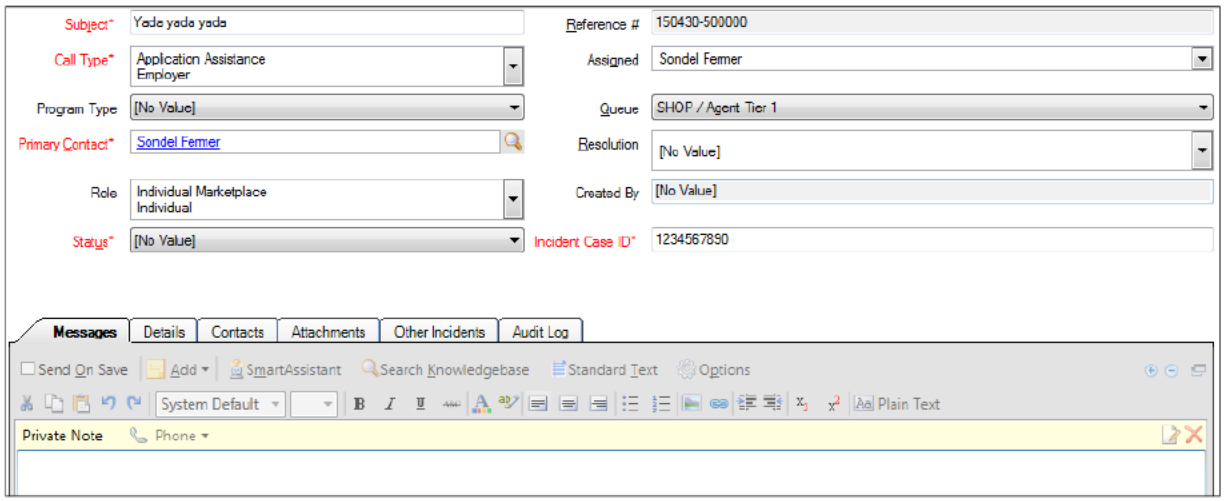
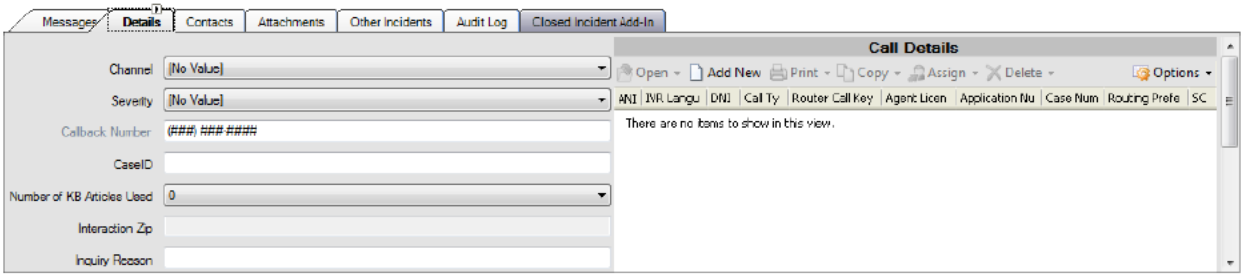
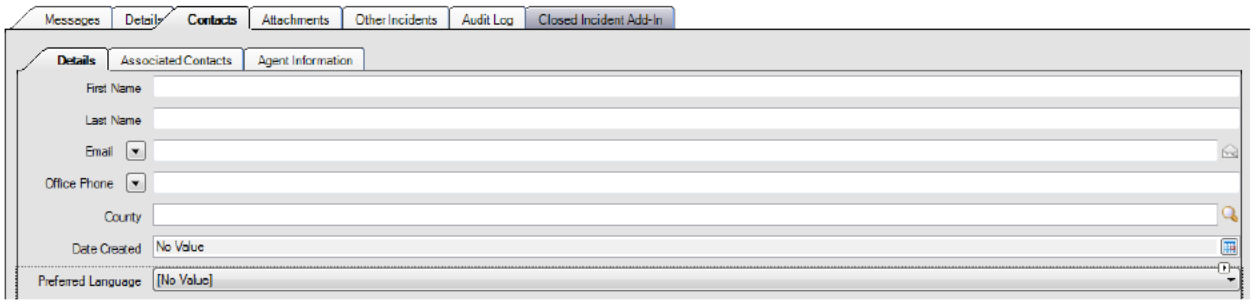
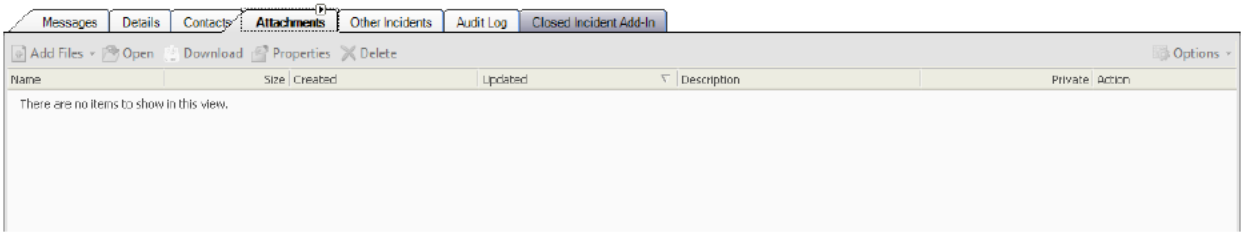
Attachments
Outreach Activity
Audit
Hidden
Options
When
Who
What
Description
There are no items to show in this view.

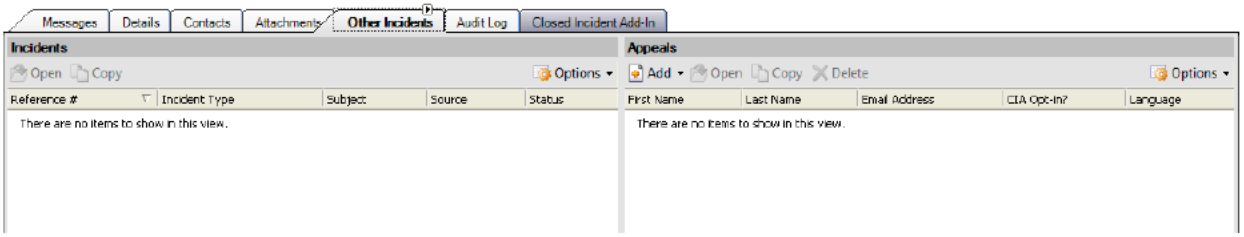
Incident Workspace











3.6 Workspace Rules

SHOP Contact WS Rules

Name	When	If	Then
Role (Product) Exclusions	The editor loads		Set Role to exclude Individual Marketplace, Other menu items
Outreach Opt-in equal No	The editor loads		Set Outreach Opt In to No

SHOP Incident WS Rules

Name	When	If	Then	Else
set logged in analyst	The editor loads	A new record is being created	Set Assigned to Logged in account	
Default Queue to Tier 1	The editor loads	A new record is being created	Set Queue to SHOP / Agent Tier 1	
Status to Open	The editor loads	A new record is being created	Set Status to Open	
Resolution (Disposition) Exclusions	The editor loads		Set Disposition to exclude Provided Knowledge Solution, Quick Sort Result-External Referral, Provided Non-Knowledge Solution, Closed Due to Customer Inactivity, Email Delivery Failed, Knowledge Missing, Knowledge Improvement/Recommendation, 1/1/14 Date Requested, Create an Opportunity, Incident Resolved, Referred by OCP menu items	
Assigned Required	The editor loads		Make Assigned required	
makes assigned read only for SHOP SCR	The editor loads	The logged in account's profile equals SHOP Tier 1	Make Assigned read only	
Role (Product) Exclusions	The editor loads		Set Role to include No Value, SHOP Marketplace, CEC Program, Other menu items	
Status Exclusions	The editor loads		Set Status to include No Value, Open, Transferred, Escalated, Updated, Closed menu items	
Call Type (Categories) - Exclusions	The editor loads		Set Category to include No Value, Agent, Eligibility, General Information, LMS, Misrouted Call/Transferred To, SHOP Phone, System Issues, CEC Assist, Application Assistance, Financial Management, COBRA menu items	
Assigned To - Exclusions	The editor loads		Set Assigned to include No Value, Logged in account, Pinnacle - SC, Pinnacle - BO menu items	

Name	When	If	Then	Else
Queues - Exclusions	The editor loads		Set Queue to include No Value, SHOP Agent Certification, SHOP / Agent Tier 1, SHOP / Agent Tier 2, SHOP / Agent Email, SHOP / Agent LMS, SHOP COBRA, SHOP Eligibility, SHOP Financial Management, SHOP Manager, CEC General English, CEC General Spanish, CEC Manager, CEC Team Lead menu items	
Transferred Status	Status changes	Status in list Transferred, Escalated	Set Assigned to No Value	
Escalated Status	Status changes	Status equals Escalated	Set Queue to SHOP / Agent Tier 2	
Closed Status Rule	Status changes	Status equals Closed	Make Disposition required	Make Disposition optional
Set Queue - COBRA	Category changes	Category in list COBRA	Set Queue to SHOP COBRA AND Set Assigned to No Value	
Set Queue - Financial Mgmt	Category changes	Category in list Financial Management	Set Queue to SHOP Financial Management AND Set Assigned to No Value	
Set Eligibility Queue	Category changes	Category in list Eligibility, Enrollment, Carrier, Renewal	Set Queue to SHOP Eligibility AND Set Assigned to No Value	
Set Queue Agent Certification	Category changes	Category in list Agent Certification, Documents, Payment Portal, Delegation, Termination	Set Queue to SHOP Agent Certification AND Set Assigned to No Value	
Set Queue Agent LMS	Category changes	Category in list LMS	Set Queue to SHOP / Agent LMS AND Set Assigned to No Value	
Quick Sort = Show LastRun	The editor loads	QuickSort Used? equals Yes		
QuickSort = Complete	QuickSortTransferComplete named event fires		Set Disposition to Quick Sort Result- External Referral AND Set Status to Closed	
QuickSort = Transfer	QuickSortCounty Transfer named event fires		Add standard text 'QuickSortCountyTransfer' as Private Note to thread AND Set QuickSort Used? to Yes AND Set QuickSort Outcome to External Transfer AND Display a message box	
Quicksort = No Transfer	QuickSortNoTransfer named event fires		Add standard text 'QuickSortNoTransfer' as Private Note to thread AND Set QuickSort Used? to Yes AND Set QuickSort Outcome to Covered California Service Center AND Display a message box	
New Rule	The editor loads	The logged in account's profile in list 1 CoveredCA Full Admin, Full Admin - katie	Show Rules Hit By Incident tab	

3.7 SHOP Reports

- CEC Helpline Search
- Employer -- Employee Search
- Incidents by Queue's
- Incidents with Call Types
- SHOP Agent Certification
- SHOP Agent Emails
- SHOP Agent Performance
- SHOP Call Center
- SHOP COBRA
- SHOP Contact QuickSearch
- SHOP Contacts Search
- SHOP Eligibility
- SHOP Financial Management
- SHOP Incident QuickSearch
- SHOP Incident Search
- SHOP LMS
- SHOP My Inbox
- SHOP My Incidents
- SHOP Tier 2 Escalation
- Unassigned (Not Closed) Incidents by Queue

4 SITE-WIDE CONFIGURATION

4.1 Products, Categories and Dispositions

4.1.1 SHOP Specific Products (GUI label: Role)

- SHOP Marketplace
  - Employee
  - Employer
  - Agent
  - General Agent
  - Dependents
  - COBRA
- CEC Program
  - Enrollment Counselor
  - Entity

4.1.2 SHOP Program Types

- [No Value]
- SHOP
- Agent
- CEC
- CAC
- CEE
- CAE
- PBE
- Navigator
- MMCP

4.1.3 Status

- Transferred
  - allows for SHOP Queue Selection
- Escalated
  - send to Tier 2 for resolution
- Updated
- Open
- Closed
  - Require disposition/resolution

4.1.4 Categories (GUI label: Call Types)

- **Agent**
  - Agent Delegation
  - Book of Business
  - Certification Inquiry
  - Commission Inquiry
  - DocuSign Assistance
  - Password Reset / Account Unlock
  - Profile Update / Correction
- **Eligibility**
  - Application Assistance
  - Enrollment
  - Mixed Household
  - Other
  - Premium Assistance
- **General Information**
  - Current Issue
  - Other (Uncategorized)
  - Plan Information
  - Program Information
  - Renewal Inquiry
- **LMS**
  - Active Agent- log in issues
  - Agent Showing in R1- add to LMS
  - Inactive Agents- Reinstate
  - Other
  - Profile Corrections
  - Payment Portal Questions
  - Registration Process / Status
- **Misrouted Call / Transferred to**
  - Agent Support

    - Individual Support
    - SHOP Support
    - CEC Support (revised requirements, item added)
- **SHOP Phone**
    - Agent Commission Inquiry
    - Application Assistance
    - COBRA
    - Eligibility- General Questions
    - Employee Inquiries
    - Employer Inquiries
- **System Issues**
    - System Error Message
    - Other
    - ~~Premium Assistance~~ (revised requirements, remove this item)
- **CEC Assist**
    - 1095
    - Access Code / Delegation
    - Application Assist
        - New
        - RAC
        - Eligibility
    - Certification
        - Background
    - Dashboard
    - Immigration
    - Medi-Cal
    - Password Reset / Account Unlock
    - Payment
    - Program Info
    - Roster
- Application Assistance
    - Employer
        - Eligibility
            - Documentation
            - Appeal
        - Enrollment
            - Employer
                - Term
                - Change
                - General Inquiry (revised requirements, item added)
            - Employee
                - Add
                - Term
                - Change
                - General Inquiry (revised requirements, item added)
            - Return Mail

            - Carrier
                - Eligibility
                - Correspondence
                - Access to Care
            - Renewal
                - General Inquiry
                - Documentation
                - Plan Change
                    - Employee
                    - Employer
        - Agent
            - Agent Certification
                - Documents
                - LMS
                - Payment Portal
            - Delegation
            - Termination
- Financial Management
    - Agent Commissions
    - Billing Inquiry
    - Delinquency
    - Invoice Error
    - Payment Status
- COBRA
    - Enrollment
        - Add
        - Term
        - Change

4.1.5 Dispositions (GUI label: Resolution)

- Response Provided
- Request Complete
- Fulfillment Complete
- Redirect/External Transfer
- Incident Resolved

4.1.6 Queues

SHOP Agent Certification
SHOP / Agent Tier 1
SHOP / Agent Tier 2
SHOP / Agent LMS
SHOP / Agent Email
shop@covered.ca.gov
SHOP COBRA
SHOP Eligibility
SHOP Financial Management
SHOP Manager

4.2 Site Configuration

4.2.1 Mailboxes & Standard Text Auto-Responders

- **shopelig@pinnacletpa.com**
  - Used by BackOffice
  - forwards to coveredca1@mailps.custhelp.com
  - assign to **SHOP Eligibility** queue
  - Standard Text Auto-responder:
    Thank you for your request, a representative from SHOP Enrollment Department. Your reference number is $incidents.ref_no. Please allow for two business days for the Specialist to respond to your request.

***Name**

SHOP: shopelig@pinnacletpa.com

☑ Outgoing Email Enable ☑ Incoming Email Enable ☐ Default

Outgoing Email

***Envelope From / Bounce Address**

coveredca1@mailps.custhelp.com

Friendly From / Branded Address

shopelig@pinnacletpa.com

Reply-To Address

shopelig@pinnacletpa.com

Display Name

Covered California

*Name

Eligibility Autoresponder

Hotkey

*Type

☑ Rule Text ☑ Incident Text
☐ Chat Text ☐ Chat URL

* Value

◉ Text ○ HTML Variables $

Thank you for contacting the SHOP Enrollment Department. Your reference number is $incidents.ref_no. Please allow for two business days for the Specialist to respond to your request.

Interface Visibility

Interface	Language	Visibility ☑ Select All
coveredca	English (US)	☑

Rule Name

F170 shopelig@pinnacletpa.com

Notes

Add Options

If

1 Incident.Mailbox equals [redacted] ☐ Delete Condition

Then

1 Assign Queue
SHOP Eligibility

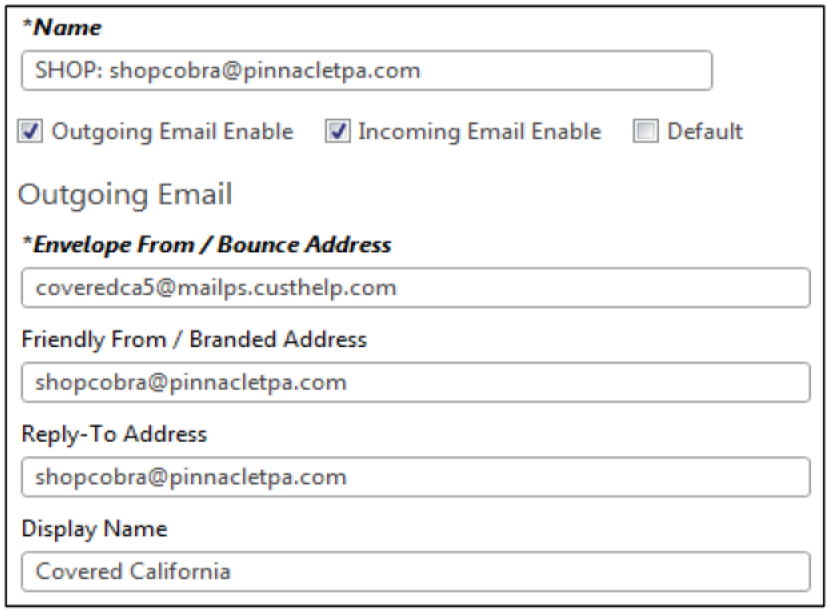
2 Set Status to
Open

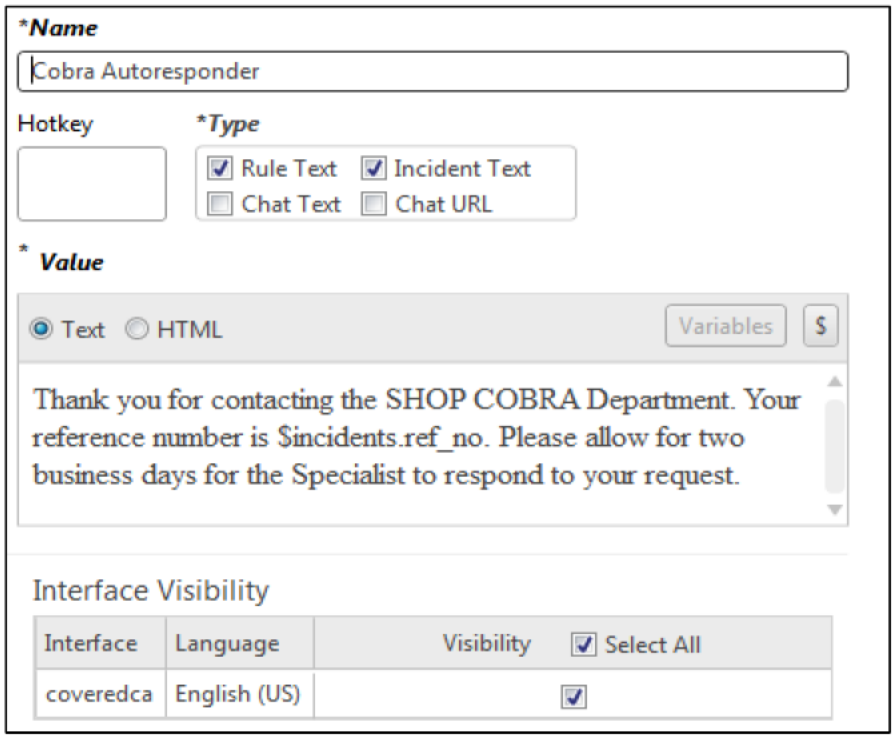
3 Append Response Template to Response Field
Pinnacle Eligibility Autoresponder

4 Send Email Response to Sender
☐ Include question ☐ Include incident details

5 Transition State and continue
210-SHOP Routing

- **shopcobra@pinnacletpa.com**
  - Used by BackOffice
  - forwards to coveredca5@mailps.custhelp.com
  - assign to **SHOP COBRA** queue
  - Standard Text Auto-responder:
    Thank you for your request, a representative from SHOP COBRA Department. Your reference number is $incidents.ref_no. Please allow for two business days for the Specialist to respond to your request.





Rule Name
F170 shopcobra@pinnacletpa.com

Notes

Add Options

If

1 Incident.Mailbox equals [redacted] ☐ Delete Condition

Then

1 Assign Queue
SHOP COBRA

2 Set Status to
Open

3 Append Response Template to Response Field
Pinnacle Cobra Autoresponder

4 Send Email Response to Sender
☐ Include question ☐ Include incident details

5 Transition State and continue
210-SHOP Routing

- **shopfinance@pinnacletpa.com**
  - Used by BackOffice
  - forwards to coveredca3@mailps.custhelp.com
  - assign to **SHOP Financial Management** queue
  - Standard Text Auto-responder:
    Thank you for your request, a representative from SHOP Financial Management Department. Your reference number is $incidents.ref_no. Please allow for two business days for the Specialist to respond to your request.

***Name**

SHOP: shopfinance@pinnacletpa.com

☑ Outgoing Email Enable ☑ Incoming Email Enable ☐ Default

Outgoing Email

***Envelope From / Bounce Address**

coveredca3@mailps.custhelp.com

Friendly From / Branded Address

shopfinance@pinnacletpa.com

Reply-To Address

shopfinance@pinnacletpa.com

Display Name

Covered California

***Name**

Financial Management Autoresponder

Hotkey

***Type**

☑ Rule Text ☑ Incident Text
☐ Chat Text ☐ Chat URL

***Value**

◉ Text ○ HTML Variables $

Thank you for contacting the SHOP Financial Management Department. Your reference number is $incidents.ref_no. Please allow for two business days for the Specialist to respond to your request.

Interface Visibility

Interface	Language	Visibility ☑ Select All
coveredca	English (US)	☑

Rule Name
F170 shopfinance@pinnacletpa.com

Notes

Add Options

If

1 Incident.Mailbox equals [redacted] Delete Condition

Then

1 Assign Queue
SHOP Financial Management

2 Set Status to
Open

3 Append Response Template to Response Field
Pinnacle Financial Management Autoresponder

4 Send Email Response to Sender
Include question Include incident details

5 Transition State and continue
210-SHOP Routing

- **agents@covered.ca.gov**
  - Used by SHOP / Agent Tier 1 & 2
  - forwards to coveredca2@mailps.custhelp.com
  - assign to **SHOP / Agent Email** queue
  - Standard Text Auto-responder:

    Thank you for contacting the Covered California Agent Service Center. This message is to confirm that we have received your submission to agents@covered.ca.gov.

    Our goal is to respond within 2 business days. Please be advised that we will respond to all emails, there is no need to send multiple requests for the same issue.

    Please ensure that you are encrypting any email that includes PII (Personally Identifiable Information) or PHI (Protected Health Information). This is information that can be used to distinguish or trace an individual's identity, either alone or when combined with other personal or identifying information that is linked or linkable to a specific individual.

    If you are requesting an Agent of Record change:

    All requests MUST be made directly through the carrier. Each carrier has their own procedures for establishing or updating an Agent of Record. If you have any questions or concerns regarding Agent of Record changes, please contact the carrier where you submitted business.

Please note the Agent Delegation email contact information for the carriers of each health plan:

[redacted]

***Name**

SHOP: agents@ & shop@

☑ Outgoing Email Enable ☑ Incoming Email Enable ☐ Default

Outgoing Email

***Envelope From / Bounce Address**

coveredca2@mailps.custhelp.com

Friendly From / Branded Address

coveredca2@mailps.custhelp.com

Reply-To Address

coveredca2@mailps.custhelp.com

Display Name

Covered California

*Name

Agents Autoresponder

Hotkey

*Type

☑ Rule Text ☑ Incident Text
☐ Chat Text ☐ Chat URL

* Value

◉ Text ○ HTML Variables $

Thank you for contacting the Covered California Agent Service Center. This message is to confirm that we have received your submission to agents@covered.ca.gov.

Our goal is to respond within 2 business days. Please be advised that we will respond to all emails, there is no need to send multiple requests for the same issue.

Please ensure that you are encrypting any email that includes PII (Personally Identifiable Information) or PHI (Protected Health

Interface Visibility

Interface	Language	Visibility ☑ Select All
coveredca	English (US)	☑

Editing Rule in Function: F170 Parse Forwarded Emails

Rule Name: F170 agents@covered.ca.gov

Notes: autoforwards to coveredca2@mailps.custhelp.com

Add Options

Add IF Condition Based On | Add Action - Else

If

1 Incident.Email Header contains agents@covered.ca.gov ☐ Delete Condition

Then

1 Assign Queue: SHOP / Agent Email

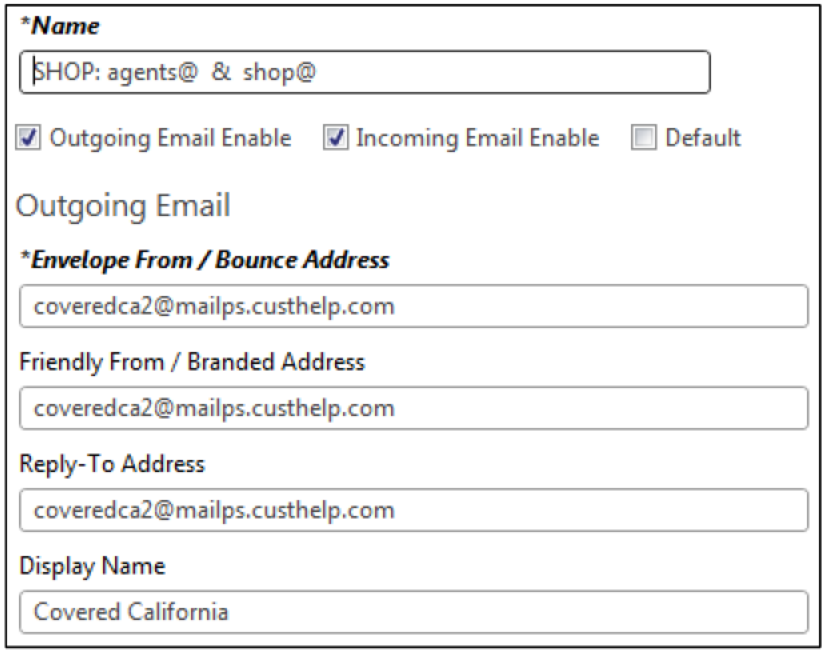
2 Set Status to: Open

3 Append Response Template to Response Field: Pinnacle Agents Autoresponder

4 Send Email Response to Sender: ☐ Include question ☐ Include incident details

5 Transition State and continue: 210-SHOP Routing

- **shop@covered.ca.gov**
  - Used by SHOP / Agent Tier 1 & 2
  - forwards to coveredca2@mailps.custhelp.com
  - assign to "**shop@covered.ca.gov**" queue
  - Standard Text Auto-responder:
    Thank you for contacting the Covered California Small Business Health Options Program (SHOP) Service Center. Your reference number is $incidents.ref_no. Please allow for two business days for the Specialist to respond to your request.



*Name

SHOP@covered.ca.gov

Hotkey

*Type

☑ Rule Text ☐ Incident Text
☐ Chat Text ☐ Chat URL

* Value

◉ Text ○ HTML Variables $

Thank you for contacting the Covered California Small Business Health Options Program (SHOP) Service Center. Your reference number is $incidents.ref_no. Please allow for two business days for the Specialist to respond to your request.

Interface Visibility

Interface	Language	Visibility ☑ Select All
coveredca	English (US)	☑

Rule Name

F170 shop@covered.ca.gov

Notes

autoforwards to coveredca2@mailps.custhelp.com

Add Options

Add IF Condition Based On ▾ Add Action - Else ▾

If

1 Incident.Email Header contains shop@covered.ca.gov ☐ Delete Condition

Then

1 Assign Queue
shop@covered.ca.gov

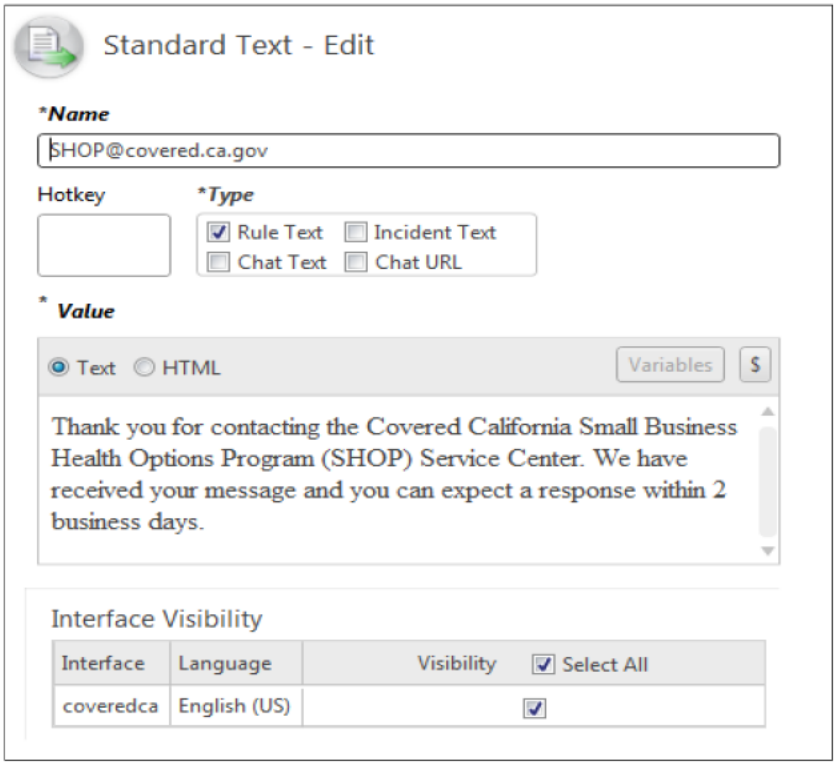
2 Set Status to
Open

3 Append Response Template to Response Field
Pinnacle SHOP@covered.ca.gov

4 Send Email Response to Sender
☐ Include question ☐ Include incident details

5 Transition State and continue
210-SHOP Routing

Configurtion > Service > Standard Text



Mailboxes Sample format:

5 APPENDIX A – WORKSPACES

5.1 Incident Workspace Screenshots

CRM Operational Support and Knowledge Base (KB) Alignment to Business Practices

Knowledge Base Solution Design Document

Version 0.2 Draft

PREPARED FOR:

COVERED CALIFORNIA

1601 EXPOSITION BLVD
SACRAMENTO, CA 95815

BY

[redacted]

TABLE OF CONTENTS

Table of Contents ..... **ii**
List of Tables ..... **iv**
List of Figures ..... **iv**
Revision Record ..... **v**
Reviewers ..... **v**
Approvals ..... **v**
1 Overview **6**
1.1 Purpose 6
1.2 KB Best Practices 8
1.3 Intended Audience 8
1.4 Anticipated Additions and Revisions 8
2 Component: Propose an Answer **10**
2.1 Process Discovery 10
2.2 User Story Steps 11
3 Component: Creating New Answers **13**
3.1 Process Discovery 13
3.2 User Story Steps 14
4 Component: Review Answers **15**
4.1 Process Discovery 15
4.2 User Story Steps 15
5 Component: Transition Plan from Existing to New Answers **17**
5.1 CRM Transition Process 17
5.2 Determine Team involved in clean up 19
5.3 Article Data Migration Process 19
5.4 Bring KB Live – Change Management Process 20
6 Component: SharePoint **21**
6.1 SharePoint Propose Answer 21
6.2 SharePoint Review Answer 21
6.3 Share Point New Answer 21
7 Component: KB Administration **22**
7.1 KB Navigation Sets 22
7.2 KB Answer Workspace 23

7.3 SCR Propose Workspace 24
7.4 Answer Workspace Rules 24
7.5 Answer Statuses 25
7.6 Product, Categories, and Dispositions 26
8 Component: Customer Portal 27
Appendix A – Taxonomy 28
Appendix B – KB Best Practices 31
Appendix C – Larger KB Business Workflows 47

LIST OF TABLES

Table 1: Discovery and Requirements Gathering Interactions 7
Table 2: Component Iteration Status 9
Table 3: R.25 Knowledge Admin Navigation Set 22
Table 4: R.25 Knowledge Manager Navigation Set 22
Table 5: Answer Workspace Rules 24
Table 6: Answer Statuses 25

LIST OF FIGURES

Figure 1: Propose an Answer 10
Figure 2: SCR Propose Answer Workflow 11
Figure 3: Content Management Team, Create New Answer 13
Figure 4: Review Answer Process Flow 15
Figure 5: Published Answer Review 16
Figure 6: Search Knowledge Base 17
Figure 7: Search Knowledge Base 18
Figure 8: Knowledge Base Filters 19
Figure 9: KB Answer Workspace 23
Figure 10: SCR Propose Workspace 24
Figure 11: SCR Propose Answer Workflow 47
Figure 12: Content Management Team, Create New Answer 48
Figure 13: Review Answer Process Flow 49
Figure 14: Published Answer Review 50

Revision Record

Version Number	Status	Date	Sections	Author	Change Description
v0.1	Draft	02/3/15	N/A	Brett Bruderer & Katie Hamaker	Initial draft for review/development
V0.2	Draft	2/5/15	N/A	Brett Bruderer	Added Requirements Gathering Flow Charts

Reviewers

Name	Organization/Role	Date
Dan Green	[redacted] – State and Local Practice Director	2/5/2015

Approvals

Approver Name	Title	Status / Updates	Date
[redacted]	[redacted]		
[redacted]			
[redacted]	[redacted]		

1 OVERVIEW

As a part of the Patient Protection and Affordable Care Act (Affordable Care Act) implementation, the State of California established the California Healthcare Eligibility, Enrollment, and Retention System (CalHEERS) Service Center. The Service Center addresses customer inquiries regarding healthcare policy changes, insurance eligibility, as well as the application, processing and appeals of customer healthcare options. Service Center Representatives (SCR) will leverage content in the Oracle RightNow Knowledge Base to guide the interaction with the Customer, and provide resolution to customer inquiries. Customers are defined as those using the consumer-facing system, into which individuals, families, and enrollment assisters input application information for individuals applying for public insurance programs. This consumer-facing system allows consumers to shop for health plans and make side-by-side comparisons of the different plans available in Covered California.

1.1 PURPOSE

The purpose of the Knowledge Base (KB) is to create and foster dynamic answers, stored in one place, that meet the needs of the internal staff when answering questions from the external public whether that's consumer or agent related questions.

The purpose of this KB Solution Design Document (SDD) is to:

- Provide a foundation for the KB Configuration Team to configure KB and address the following[1]:
  - Keyword search for articles leveraging Knowledge search engine
  - Article templates
  - Knowledge Categories
    - Article security and access profiles
    - General access from.com
- Article management (reviewing answers)
- Article authoring (creating new answers)
- Flag/submit article comments
- Request/draft new articles
- Article review and approval workflow
- Search public KB from "Customer Portal" or "Web Self Service" website
- Standard KB reports and Dashboards

[redacted]

- Exhibit A, Section D Knowledge Base Alignment to Business Practices
- Exhibit A, Section E.2 Knowledge Base Management Taxonomy, Templates and Script/article framework and best practices, Section E.6 Knowledge Base improvements plan, schedule and artifacts, Section E.7 Basic 'Out-of-the-box' Report and Dashboard configuration for RightNow Knowledge Base, Section E.8 RightNow Knowledge Base configuration, Section E.9 Data migration for Knowledge Articles, and Section E.10 RightNow Customer Portal and Knowledge Base Content
- Exhibit E, Section 1, Subsection B KB Improvement Plan, Subsection D Plan and Conduct Data Migration, Subsection E Verify and Refine the RightNow "Out-of-the-Box" Configuration
- Exhibit E, Section 2, Subsection A Taxonomy, Templates and Framework, Subsection C RightNow Interaction Connections

As a reference tool for configuration, this document serves as the basis for communication between the Covered California IT, Covered California University, and the [redacted] Team and its content will be comprehensive but easily understandable. Below is the overall Knowledge Base (KB) Solution Design resulting from discovery and requirements gathering sessions with the Covered California University (CCU) team. The following table outlines the discovery and requirements interactions.

Table 1: Discovery and Requirements Gathering Interactions

TOPIC	SUBJECT MATTER EXPERTS ATTENDEES	DATE
[redacted]		

TOPIC	SUBJECT MATTER EXPERTS ATTENDEES	DATE
[redacted]		

1.2 KB BEST PRACTICES

Please see Appendix B – KB Best Practices, for rules and framework that have been provided to Covered CA Staff. This set of Best Practices is built to govern all KB component areas, as well as provide overarching ruleset to apply to all activities and components of this document.

1.3 INTENDED AUDIENCE

All answers in the Knowledge Base will exist to service the following teams in resolving issues with the following customers: SCR's, SHOP Agents, CEC, and CIA.

1.4 ANTICIPATED ADDITIONS AND REVISIONS

This SDD is the initial version to memorialize the basic flows and enable configuration to initiate. Owing to the recommended approach to use Agile principles, the SDD will continue to be updated as future iterations are confirmed. The table below outlines the "full" anticipated structure.

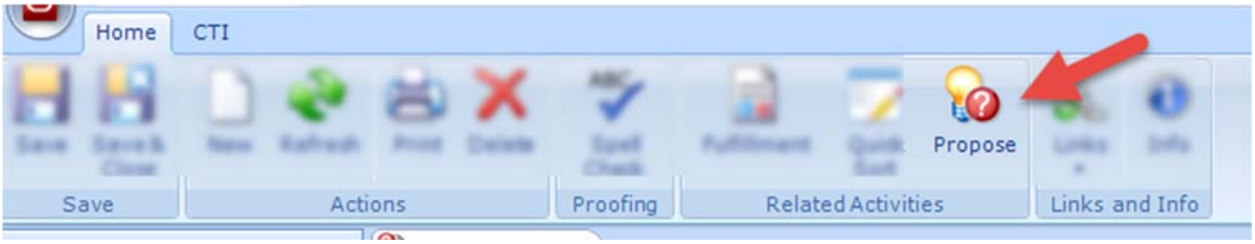
Table 2: Component Iteration Status

COMPONENT	STATUS
Propose an Answer	Base configuration in this SDD
Create a New Answer	Base configuration in this SDD
Review Answers	Base configuration in this SDD
Transition Plan from Existing to New Answers	Base configuration in this SDD, except section 5.3 which component anticipated at a future date determined by [redacted] and Covered California
SharePoint	Iterated at a future date, except section 6.2 and 6.3 which component anticipated at a future date determined by [redacted] and Covered California
KB Admin	Base configuration in this SDD, except
Customer Portal	Component anticipated at a future date determined by [redacted] and Covered California
Appendix A: Taxonomy	Initial definitions for functions referenced in other components
Appendix B: Best Practices	KB Best Practices
Appendix C: Larger Process Figures	Larger Process figures for figures: SCR Propose Answer Workflow, Content Management Team Create New Answer, Review Answer Process Flow, and Published Answer Review

2 COMPONENT: PROPOSE AN ANSWER

If new KB content is required to address a Customer inquiry, SCRs will be trained to be able to propose a new Question and Answer pair be added to KB. An SCR can propose an answer to the Knowledge Base via an incident. This button is found on the ribbon in the incident editor. The thoroughness and accuracy of the proposed answer will be determined by the amount of training and incentive provided to the SCR proposing the answer. The Research Analyst (RA) will be the first responder to the proposed answer and act as the advocate, actively engaging the required team members needed to get the answer public and consumable by the appropriate audience.

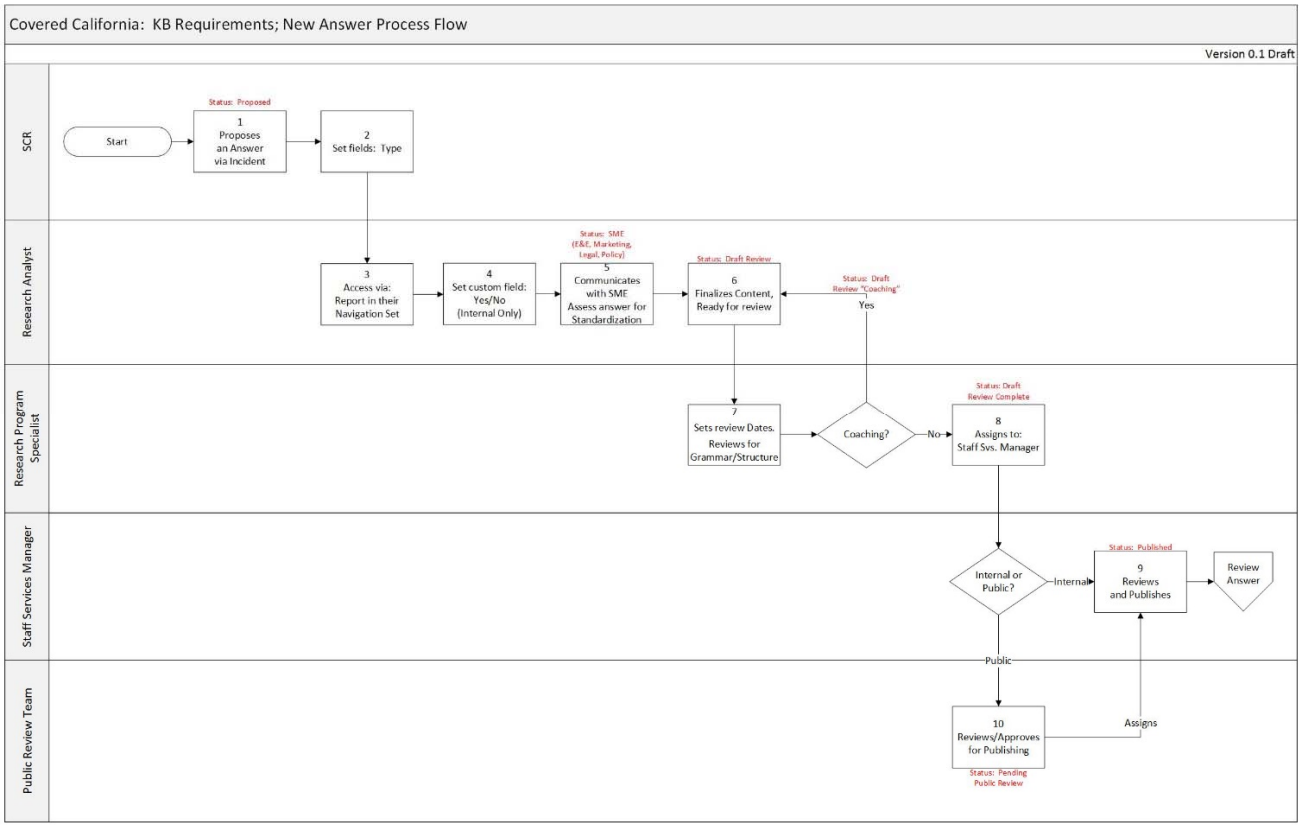
Figure 1: Propose an Answer



2.1 PROCESS DISCOVERY

The process for handling a proposed answer in CRM will be as follows:

Figure 2: SCR Propose Answer Workflow



Please see Figure 11: SCR Propose Answer Workflow in Appendix C to view larger version of process flow.

2.2 User Story Steps

1. Research Analyst (RA) will access proposed answers via a report called "Proposed Answers" from the KB Admin navigation set.

2. RA will review proposed answer, determine if answer is for internal staff only, determine if a Subject Matter Expert (SME) is required, review for answer standardization, and if the proposed answer already exists in the KB. All of the above review will require internal business process training that falls outside of configuring the KB.

3. Based upon above consideration, RA will update the answer status from Proposed to one of the following answer statuses.

    a. Draft SME: E&E
    b. Draft SME: Marketing
    c. Draft SME: Policy
    d. Draft SME: Legal
    e. Draft Review

All of the Draft SME statuses will indicate that the answer is with a SME in a certain business unit, being modified. Upon SME completion the RA will review the answer and set the status to Draft Review.

4. The Research Program Specialist (RPS) will access a report and filter answers with a status of Draft Review. The RPS will set review by dates, review for grammar and standardization. The RPS will update the status to Draft Review Coaching and provide comments in the notes tab of the workspace if work is still needed on the answer. Based upon RPS consideration, the RPS will update the answer status to anyone of the following statuses:

    a. Draft Review Coaching
    b. Draft Review Complete
    c. Pending Public Review
    d. Published
    e. Published Temporary

5. The RA will access a report filtered by logged in user, showing only answers in a Draft Review Coaching status and make changes requested by the RPS. The Draft Review Coaching status was added to help provide a more efficient learning curve between the RA and the RPS on what it takes to make an answer consumable by the end user.

6. Once the answer is ready for public consumption the RPS will either set the status to Published (if the answer is only consumable by internal staff), or set the answer to Pending Public Review.

7. Public Review is a business process that has not yet been determined. Once the process has been determined and approved, the process will outline the final review an answer needs to go through to be ready for consumption by people outside of Covered California (agents and consumers).

3 COMPONENT: CREATING NEW ANSWERS

KB Content Management Team has the ability to generate, manage, and publish answers to frequently asked questions and solutions for use by Service Center Representatives (SCRs), and other users.

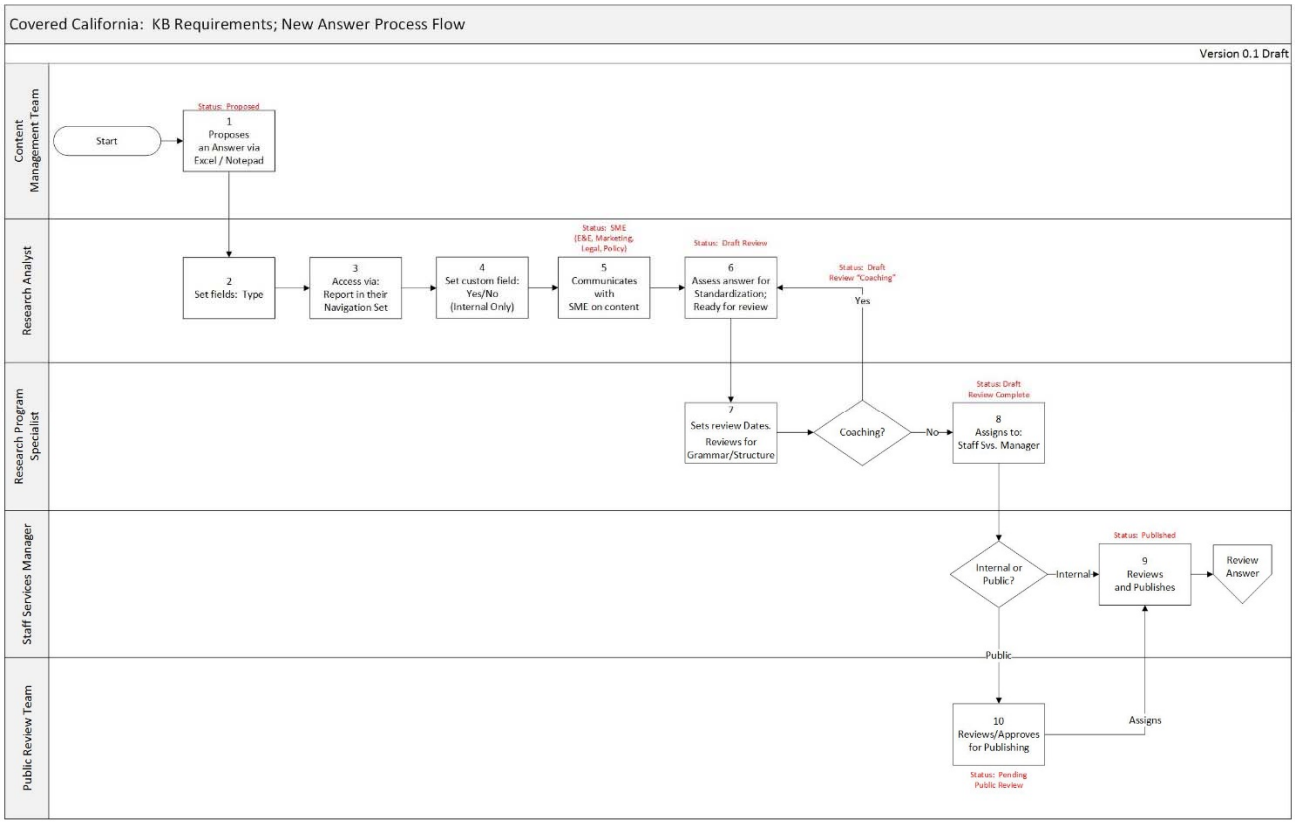
When a Customer reaches out to the Exchange Service Center, the Service Center Representative leverages articles in KB to answer customer inquiries. The Knowledge Base is the central repository of information available to SCRs to process a customer inquiry. Articles are uploaded to KB in formats including Scripting, Question and Answer Pairs, Procedure Documents and Standard Text.

Users are able to search KB by Keywords, Subject, Incident Type, and Contact Type.

New answers will be created in SharePoint and pushed via API into the CRM. For more information on this process, Covered CA IT Department will liaison with Kiefer (contractor) staff that developed the SharePoint to KB API.

3.1 PROCESS DISCOVERY

Figure 3: Content Management Team, Create New Answer



Please see Figure 12: Content Management Team, Create New Answer in Appendix C to view larger version of process flow.

3.2 User Story Steps

1. RA will access new answers via a report called “New Answers” from the KB Admin navigation set.

2. RA will review new answer and review for answer standardization. The standardization review will require internal business process training that falls outside of configuring the KB.

3. Based upon above consideration, RA will update the answer status from New Answer to one of the following answer statuses.
    a. Draft Review

4. The Research Program Specialist (RPS) will access a report and filter answers with a status of Draft Review. The RPS will set review by dates, review for grammar and standardization. The RPS will update the status to Draft Review Coaching and provide comments in the notes tab of the workspace if work is still needed on the answer. Based upon RPS consideration, the RPS will update the answer status to anyone of the following statuses:

    a. Draft Review Coaching
    b. Draft Review Complete
    c. Pending Public Review
    d. Published
    e. Published Temporary

5. The RA will access a report filtered by logged in user, showing only answers in a Draft Review Coaching status and make changes requested by the RPS. The Draft Review Coaching status was added to help provide a more efficient learning curve between the RA and the RPS on what it takes to make an answer consumable by the end user.

6. Once the answer is ready for public consumption the RPS will either set the status to Published (if the answer is only consumable by internal staff), or set the answer to Pending Public Review.

7. Public Review is a business process that has not yet been determined. Once the process has been determined and approved, the process will outline the final review an answer needs to go through to be ready for consumption by people outside of Covered California (agents and consumers).

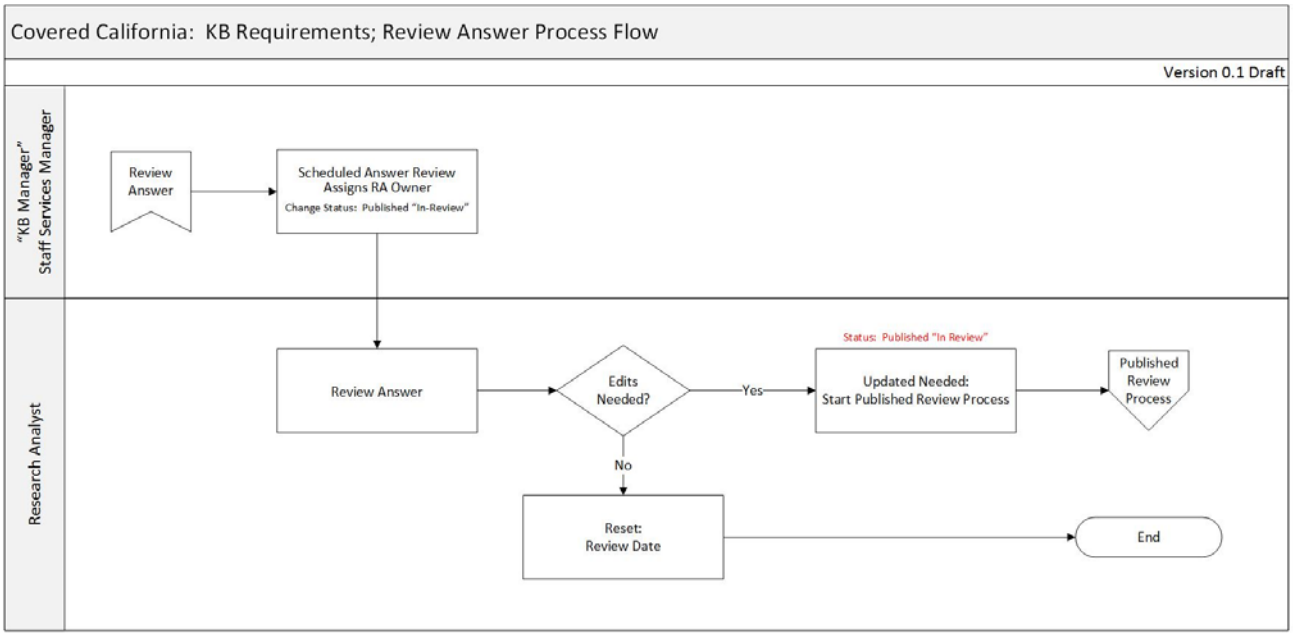
4 COMPONENT: REVIEW ANSWERS

The Review Answers component is the process that the KB team will go through when an answer has an upcoming review date. The review process is meant to manage the following:

- Review public answers and keep them public while still in review
- Determine which answers need to be archived and set to a status type of private
- Review the most pressing answers first

4.1 PROCESS DISCOVERY

Figure 4: Review Answer Process Flow



Please see Figure 13: Review Answer Process Flow in Appendix C to view larger version of process flow.

4.2 USER STORY STEPS

1. The KB Manager will view a report called the Answer Review report that shows all answers about to go into a review status within a the month. The report will show the upcoming months and the number of answers to review within that month. The report will drill down into the details of the answer in review. It will show certain fields to help the KB Manager assign the answers to the KB Admin team before the answer expires.

2. RPS accesses Answer Review Report in Navigation Set.

3. RPS assigns the answers out to the KB Admin team and sets the status to Pending Public Review.

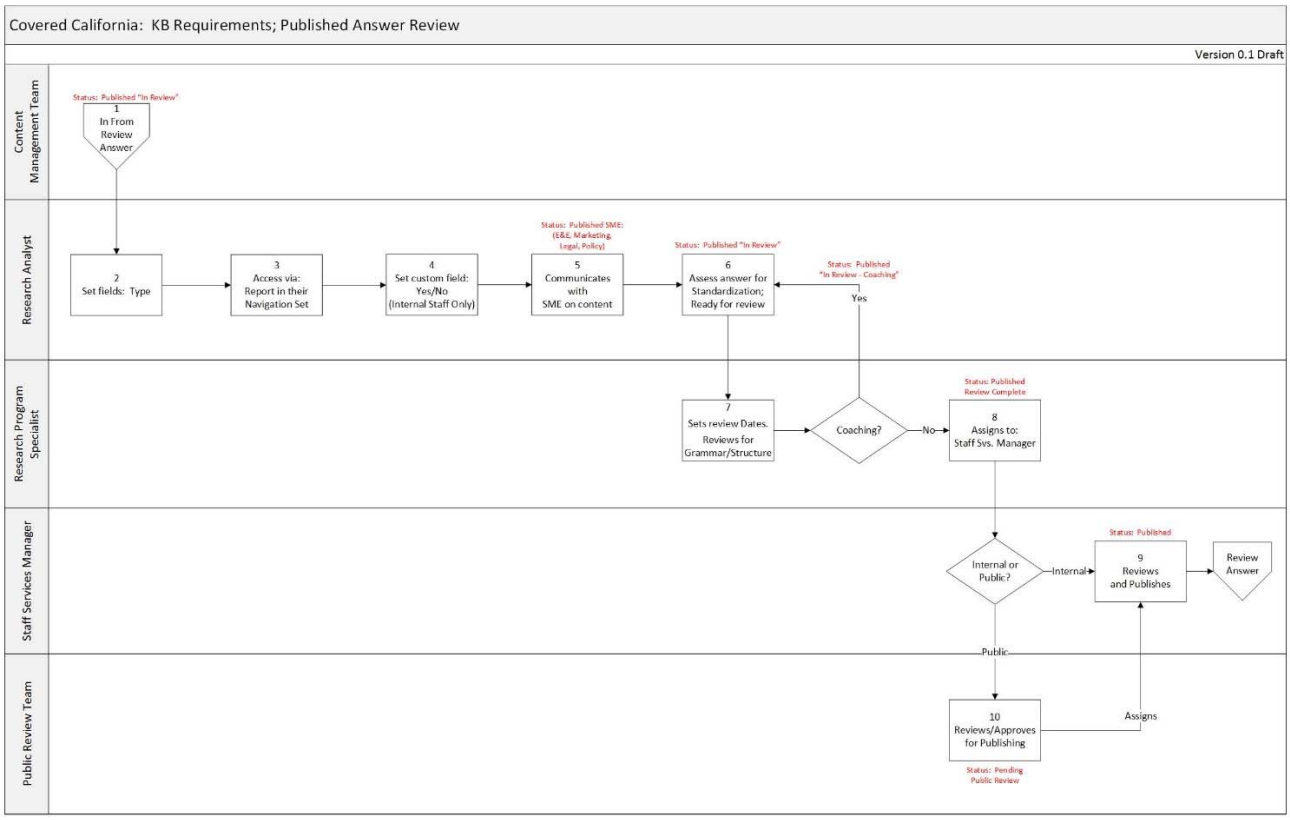
4. RA team member logs in to access report of answers assigned to the logged in user and have a status of Pending Public Review.

5. If a published answer needs review, the status gets updated to anyone of the following based upon the consideration of the RA:

    a. Published SME: E&E
    b. Published SME: Marketing
    c. Published SME: Policy
    d. Published SME: Legal

    All of the Published SME statuses will indicate that the answer is with a SME in a certain business unit, being modified. Upon SME completion the RA will review the answer for grammar and standardization and set the status to 'Published in Review'.

Figure 5: Published Answer Review



Please see Figure 14: Published Answer Review in Appendix C to view larger version of process flow.

6. The Research Program Specialist (RPS) will access a report and filter answers with a status of 'Published In Review'. The RPS will set review by dates, review for grammar and standardization. The RPS will update the status to 'Published In Review' Coaching and provide comments in the notes tab of the workspace if work is still needed on the answer. Based upon RPS consideration, the RPS will update the answer status to anyone of the following statuses:

    a. Published Review Complete
    b. Published Temporary

5 COMPONENT: TRANSITION PLAN FROM EXISTING TO NEW ANSWERS

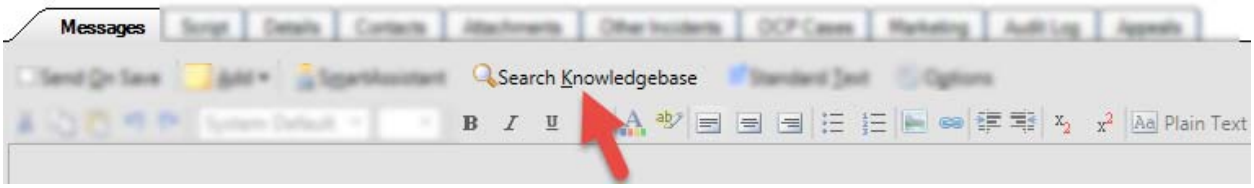
The transition plan from existing answers to new answers is meant to address the following:

- ❑ Document a process for transitioning from the old answers to the new answers with as minimal interruption as possible for the internal staff.
- ❑ Learn best practices when creating answers and apply them to updates
- ❑ Bring new KB live and create excitement and buy-in for a revitalized KB.
- ❑ Determine the teams involved in the clean-up process and identify timelines for completion.

5.1 CRM TRANSITION PROCESS

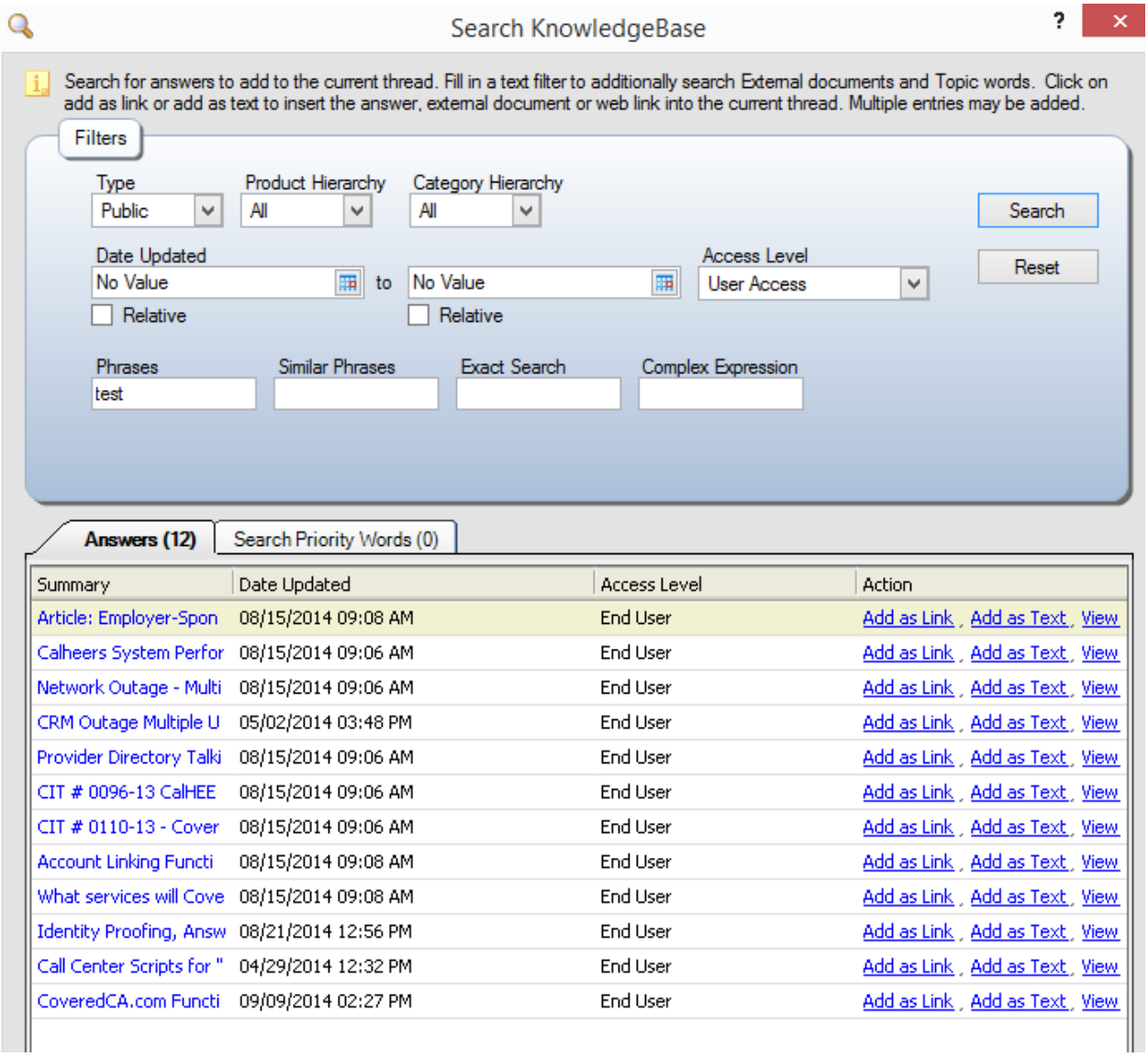
Internal Staff using CRM currently use the Search Knowledge Base on an incident to find answers.

Figure 6: Search Knowledge Base



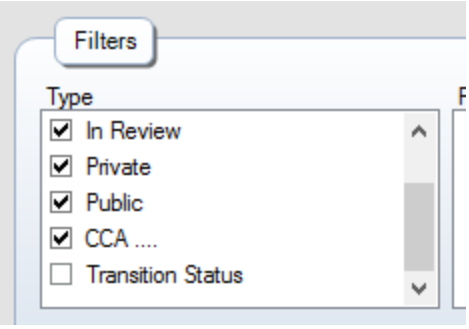
When the team member clicks on Search Knowledge Base a report helps the staff member find answers related to the incident.

Figure 7: Search Knowledge Base



This report will include a modified filter that forces the staff member to only see specific statuses that will not include the new answer. The example below is a sample of what it could look like and does not accurately represent the actual answer statuses. Since the test site is also a training site, I could not capture this level of detail. To see the actual answer statuses being proposed, see section 7.5 Answer Statuses.

Figure 8: Knowledge Base Filters



5.2 DETERMINE TEAM INVOLVED IN CLEAN UP

KB Admin team and a Rapid Response team will both be involved in the clean-up process:

1. KB Team will put all answers into specific buckets. The buckets are defined as follows:
    a. Internal HR Process – Shift Change, Evacuation Process
    b. CIT/CalHEERS System Updates
    c. Task Guides/Job Aids
    d. Training (includes PPTs)
    e. Consumer Notices
    f. Press Releases
    g. Market Collateral
    h. Not Needed

2. KB Manager and PM team to identify a Rapid Response team member to represent each of the buckets.

3. Rapid Response Team to use Answers Most Utilized report and feedback from the KB Admin team to determine the most used and most important answers to transition and rewrite into new KB.

4. KB Admin team to break out existing long answers and separate into a number of smaller answers.

5. Remaining business processes needs further review as well, and to monitor the functionality of this team once KB is live with real world content.

5.3 ARTICLE DATA MIGRATION PROCESS

5.4 Bring KB Live – Change Management Process

1. Identify answers used most by the internal staff and fix those first
2. Review and refine answers by testing search with supportive change agents
3. Define Go-live plan
4. Provide train the trainer session
5. Train teams on new KB and easy to use answers
6. Go-live

6 COMPONENT: SHAREPOINT

SharePoint currently stores all internal documentation. The interactive connection between SharePoint and KB is still in Requirements and Discovery phase.

6.1 SHAREPOINT PROPOSE ANSWER

Internal Staff proposes an answer from an incident using Propose button on ribbon

- KB Admin searches Knowledge Base for existing answer.
- If no answer exists, KB Admin, creates new answer in Share Point.
- Once written, reviewed, proofed, new answer gets pushed from SharePoint in to KB.

6.2 SHAREPOINT REVIEW ANSWER

Component anticipated at a future date determined by [redacted] and Covered California

6.3 SHARE POINT NEW ANSWER

Component anticipated at a future date determined by [redacted] and Covered California

7 COMPONENT: KB ADMINISTRATION

This section represents the administrative portion of the KB Administration team. It defines how the navigation sets will look, the answer workspaces along with any workspace rules and custom fields. It details answer statuses and the definition for each.

7.1 KB NAVIGATION SETS

Table 3: R.25 Knowledge Admin Navigation Set

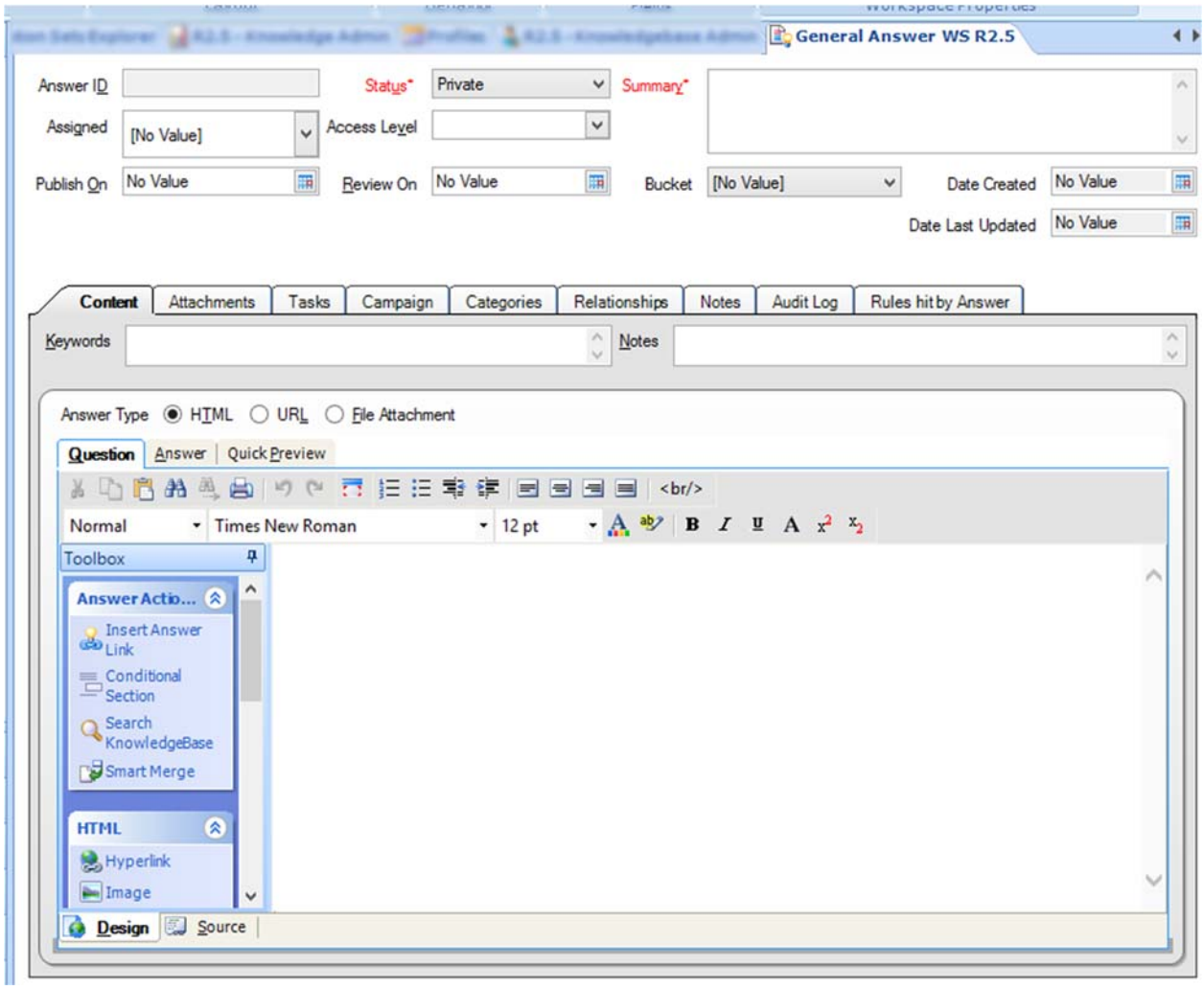
HOME	INCIDENTS	CONTACTS	ANSWERS	QUICK SEARCH
My Answers 2.0	Incidents Search	Contacts Search	Answer Search - KB Worker	Answer QuickSearch
Proposed Answers			Hot Answers	Incident QuickSearch
Draft Review			…Keyword Search	
Published Review			Search Priority Words	
Notifications			Answer Stopwords	
New Answers			Answers Utilized by Agents	

Table 4: R.25 Knowledge Manager Navigation Set

HOME	INCIDENTS	CONTACTS	ANSWERS	QUICK SEARCH
My Answers 2.0	Incidents Search	Contacts Search	Answer Search - KB Worker	Answer QuickSearch
Proposed Answers			Hot Answers	Incident QuickSearch
Draft Review			…Keyword Search	
Published Review			Search Priority Words	
Notifications			Answer Stopwords	
New Answers			Answers Utilized by Agents	
Answer Review				

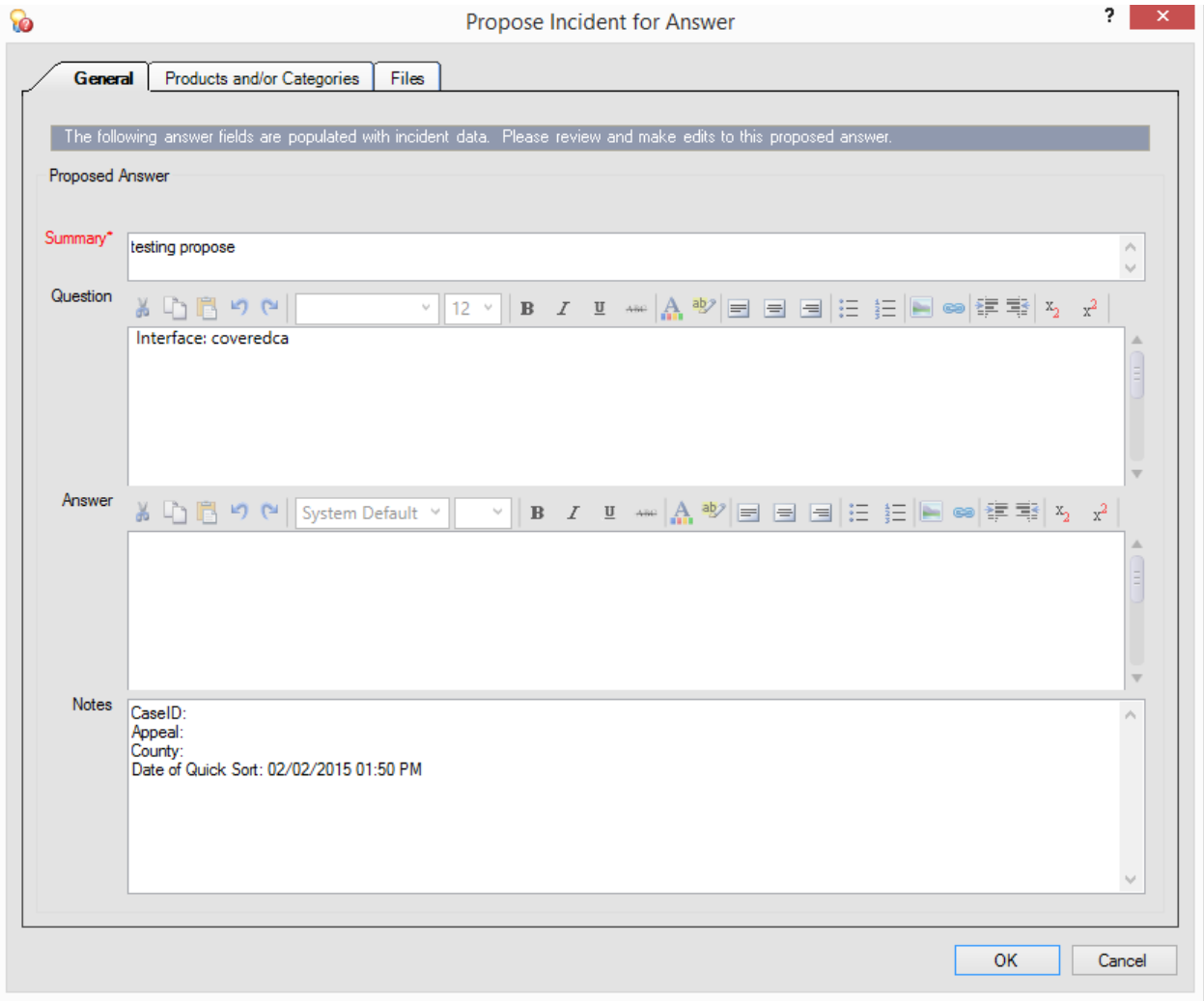
7.2 KB ANSWER WORKSPACE

Figure 9: KB Answer Workspace



7.3 SCR Propose Workspace

Figure 10: SCR Propose Workspace



7.4 Answer Workspace Rules

Table 5: Answer Workspace Rules

Name	When	If	Then
Statuses Available	The editor loads		Set Status to exclude Proposed menu items
Set Default Status	The editor loads	A new record is being created	Set Status to In Review AND Set Access Level to Unspecified
Status = Public	The editor loads OR Status changes	Status equals Public	Set Access Level to End User AND Make Access

NAME	WHEN	IF	THEN
			Level read only AND Make Access Level optional
Status = In Review	The editor loads OR Status changes	Status equals In Review	Make Access Level optional AND Make Access Level editable
Status = Private	The editor loads OR Status changes	Status equals Private	Make Access Level editable AND Make Access Level required
Status = Private AND Access = End User	The editor loads OR Status changes	Status equals Private AND Access Level equals End User	Set Access Level to Unspecified
Multiple Access Levels	The editor loads OR Status changes OR Access Level changes	Status equals Private AND (Access Level equals Private - Not Tier 1, Private - All OR Access Level equals Private - All, End User OR Access Level equals Private - Not Tier 1, End User)	Set Access Level to Unspecified AND Display a message box

7.5 ANSWER STATUSES

Table 6: Answer Statuses

STATUS ID	STATUS TYPE	DEFINITION
New Answer	Private	A new answer is created in SharePoint. When it's pushed to CRM, the status will be automatically set to New Answer
Proposed	Private	Status of an answer that gets Automatically set by the system from an agent during the propose answer process
Draft SME: E&E	Private	RA sets this status when an answer needs a SME review by an E&E team member
Draft SME: Marketing	Private	RA sets this status when an answer needs a SME review by a Marketing team member
Draft SME: Policy	Private	RA sets this status when an answer needs a SME review by a Policy team member
Draft SME: Legal	Private	RA sets this status when an answer needs a SME review by a Legal team member

STATUS ID	STATUS TYPE	DEFINITION
Draft Review	Private	RA sets this status when an answer needs review by the RPS for standardization and to set a review date
Draft Review Coaching	Private	Set by the RPS when an answer has been reviewed and is still in need of editing by the RA
Published	Public	Set by the RPS when the Draft Review stage is complete and then answer is ready for consumption by the end user
Published Temporary	Public	Set by the RPS when an answer has been reviewed and is ready for consumption by the end user but has a specific date that the answer must be updated by
Pending Public Review	Private	Set by the RPS when the Draft Review stage is complete and the answer needs a final review for public consumption. (Note: this team and business process is still yet to be identified)
Published SME: E&E	Public	Set by the RA when an answer comes up for review and needs a SME review by an E&E team member
Published SME: Marketing	Public	Set by the RA when an answer comes up for review and needs a SME review by a Marketing team member
Published SME: Policy	Public	Set by the RA when an answer comes up for review and needs a SME review by Policy team member
Published SME: Legal	Public	Set by the RA when an answer comes up for review and needs a SME review by a Legal team member
Published In Review	Public	Set by the RPS when assigning out answers to the KB team that are in need of review
Published In Review Coaching	Public	Set by the RPS when an answer has been reviewed and is still in need of editing by the RA
Published Review Complete	Public	Set by the RPS when an answer has been reviewed and is ready for consumption by the end user
New Answer	Private	A new answer is created in SharePoint. When it's pushed to CRM, the status will be automatically set to New Answer
Proposed	Private	Status of an answer that gets Automatically set by the system from an agent during the propose answer process
Draft SME: E&E	Private	RA sets this status when an answer needs a SME review by an E&E team member
Draft SME: Marketing	Private	RA sets this status when an answer needs a SME review by a Marketing team member

7.6 PRODUCT, CATEGORIES, AND DISPOSITIONS

Being reviewed by Thursday 2/5/15 by Nancy Kvale and team.

8 COMPONENT: CUSTOMER PORTAL

Component anticipated at a future date determined by [redacted] and Covered California

APPENDIX A – TAXONOMY

- This Answer - Any knowledge base information that provides solutions to common customer support questions.
- Answer Access Level - A method of controlling what information is visible to customers. The default answer access levels are Help and Everyone, and custom access levels can be added.
- Answer Relationship - The relationship between two or more related answers. Answer relationship types include sibling, manually related, and learned link. Sibling and manually related answer relationships are defined by staff members. Learned link answers are automatically defined through customer activity.
  - See Learned link, Manually related answer, and Sibling answer.
- Answer Status - A method of controlling the visibility of an answer. The default answer statuses are Public, Private, Proposed, and Review, and custom answer statuses can be added.
- Answer Status Type - The status of an answer that determines whether it can be viewed by customers. The default answer status types are Public and Private.
- Answers Page - A page on the customer portal where customers can view answers and search the knowledge base. Customers can view individual answers or search the knowledge base using selection criteria to narrow their search. If additional elements are enabled, customers can also search documents, websites, and communities.
  - See also Web Indexer and Oracle RightNow Social Experience communities.
- API - An interface that enables programmers to communicate with the Oracle database. The API includes functionality to create, update, delete, and retrieve answers, contacts, hierarchical menus, incidents, opportunities, organizations, quotes, SLA instances, staff accounts, and tasks.
- Conditional Section - A section of text in a document that appears only to those contacts meeting certain criteria. Conditional sections can also be placed in answers and tagged with specific answer access levels. In message templates, conditional sections can be used to filter content by contact, profile, runtime variable, or record type.
  - See Access level conditional section and Document.
- Everyone Access Level - An access level designed to allow answers to be visible to all customers depending on the answer status.
- File Attachment Answer - A type of answer that appears as a file attachment.
- HTML Editor - A WYSIWYG (what you see is what you get) editor for formatting and editing answers, mailings, campaigns, documents, questionnaires, and invitation messages in HTML without previous HTML experience.
- Knowledge Base - All information (such as answers, incidents, contacts, organizations, opportunities, products, staff accounts, tasks, mailings, and campaigns) maintained and presented by Oracle RightNow CX in a meaningful way. Knowledge base also refers to the interrelationships among the pieces of information.
- Learned Link - Related answers that have a learned relationship as a result of customer activity.
- Privileged Access Answers - Answers that are assigned a custom access level for viewing by certain contacts and organizations assigned to the appropriate service level agreement.

- See SLA.

- Product Linking - An option for linking products to categories and products to dispositions so that category and disposition choices are narrowed to only those associated with the selected product for staff members working with incidents and customers searching on the customer portal.
- Propose Answer - A function for proposing that an incident's solution be added to the answers available to customers. The proposed answer is reviewed by the knowledge engineer, who determines if it should be made public and, if so, its access level, status, language, and visibility.
- Proposed - One of the default answer statuses. This answer status indicates that the answer has been proposed by a staff member from an incident. Answers with a Proposed status are not visible to customers.
  - See Answer status.
- Public - One of the default answer statuses and status types. Answers marked Public may be visible to customers depending on their access level and language.
  - See Answer status and Answer status type.
- Question - The main element in a survey. Text, choice, and matrix question types can be created. Questions can be used in multiple surveys, mixing and matching as necessary.
  - See Choice question, Matrix question, and Text question.
- Related Answers - A feature that assists customers in finding answers to questions related to the current web visit. Related answers appear on the answer details page and are sorted by relatedness—those answers that appear at the top of the list are most related to the answer being viewed.
- Search Priority Word - A word that is associated with an answer or document. The associated answer or document will always be displayed to customers when the search priority word is included in their search text.
- Search Index - A matrix that includes a list of important words within a document and their document of origin, allowing efficient searching. In some cases, the matrix is a database table. In other instances, the matrix is a file stored on a hard drive. For a word or phrase to be searchable within an incident, answer, file attachment, or external document, it must first be indexed.
- Self Learning Knowledge Base - The automatic generation of self-service content based on customer interactions so that the most pertinent information is presented.
  - See also iKnow and Knowledge base.
- Sibling Answer - Related answers that share the same product or category. Sibling answers may also contain the same file attachments.
- SLA Instance - A customer's individual copy of an SLA. An SLA is a generic contract that has not been applied to a specific customer. An SLA instance is a copy of the generic SLA applied to a specific customer.
- Standardization - Standardization – This is a business process, determined by Covered California University team or the KB team and will represent the repeatable process that each answer will go through when being created or reviewed.
- Suggested Answers - The list of answers from the knowledge base that is returned when SmartAssistant is invoked, either by staff members working on incidents or engaged in chat sessions or through business rules that append answers to email questions and Ask a Question queries from customers.

- See also SmartAssistant.

- Word Stemming - A feature used in keyword indexing and text searching that finds the root of each word and stores the stemmed root instead of the whole word, thereby saving large amounts of space while making a search broader and more appropriate.

APPENDIX B – KB BEST PRACTICES

Knowledgebase

Getting Started: Covered California

Website Support Goals

- Measuring Success
  - Call Deflection/Reduce Operating Costs
  - End User Adoption
  - Ease of Use
  - **Customer Satisfaction**

- Important for HOW success is measured
  - maximizing the interaction vs call deflection

Internal KB Success

- Majority of answers will be self-serve, not a lot of answers created through "Ask A Question"
  - Success Measures: Questions Avoided Report
- Internal Adoption (volume of self service is increasing over time)
  - Success Measures: Page Turns, Session Data, SCR Verbal Feedback
- Single Source of Truth – Consistency of answers, increased visibility in to questions being asked
  - Success Measures: Answer Feedback, All Knowledgebase Reports

Internal Knowledgebase

1. Limit Access by IP range
   - Settings>common>SEC_VALID_ENDUSER_HOSTS
   - A bit more cumbersome to manage IP addresses (working from home etc)
2. Single Sign-On
   - Not in scope
   - Usually involves a 3rd party
   - Once set up, is simple and easy to use
3. SLAs and Access Levels
   - Involves the set up of conditional answers
   - All agents will need to create username and password
   - Can be used in combination with 1 & 2

External Knowledgebase

- Home Page
  - Who will be accessing?
    - SCR, Covered California Staff (licensed)
    - Covered California Staff (non-licensed staff)
    - Consumers
    - External Partners
  - Where will Customers come from?
    - Where is the support page link?
  - Who is responsible for creating those links?
  - Who is responsible for look and feel mockups?

Answer Page Overview

- Static vs Dynamic Language – language that leads to a list of FAQs
  - Online Support
  - Need Help?
  - Knowledge Help
  - Customer Service

Creating Effective Answers

- Simple, Action Oriented, Short (5 words or less in the subject)
- Create Shorter Answers that link to other answers
- Use stop words to skip common words from being indexed
- Keywords - Use sparingly
- Aliases - Handles industry jargon, common word variations (email, e-mail)
- Use Consistent Formatting
- Create/Use a pre-defined style guide for answers

Answer Content Strategies

- Start with 10-12 answers and take advantage of ongoing questions, internal conversations to capture real-world issues
  - Places to get started: Most important category/product, upcoming events, FAQ's
- Allow SCRs to propose answers – publish new answers every week (provide incentive to agents to submit?)
- As you search recently solved incidents, view session logs to see if customers searched or viewed answers before submitting incident
- Before creating a new answer, search for existing answers that may already cover your topic. You may be able to avoid duplication by updating an existing answer

Answer Visibility

- Answer Status: Private, proposed, public and review (can create additional statuses
- Products/Categories: can be 6 deep, these are core to the product, small changes impact everyone (note: less than 5% of customers will use dropdowns due to fatigue)
- Answer Access: Allows you to control visibility to different end user groups (agents vs customers vs business)
- Review: Use review to pull time sensitive info off your site on a specific day (this is run at night so the answer will be pulled the night of the day to be removed)
- Publish: Set up content in advance
- Display Position: determines the position of the new answer relative to other answers

Searching for Answers

- A little extra detail
  - Service Cloud search engine is internal (intranet/KB search only)
  - Most search engines use AND – Service Cloud uses OR and heavy weighting on words. You can change this in config settings: ANS_AND_SEARCH
  - Content is indexed in the following order
    - Products and Categories
    - Keywords
    - Summary
    - Question
    - Answer
    - File Attachments

Searching for Answers Cont'd

Setting	Impacts	Default Weight
SRCH_KEY_WEIGHT	Keywords	50
SRCH_PROD_WEIGHT	Product Words	50
SRCH_CAT_WEIGHT	Category Words	50
SRCH_SUBJ_WEIGHT	Summary/Subject/Title Words	45
SRCH_DESC_WEIGHT	Question Words	30
SRCH_BODY_WEIGHT	Answer Words	4
SRCH_ATTACH_WEIGHT	File Attachment Words	4

Answer Publishing Process

- Start with structure but allow for the people who use the KB to improve it as they use it
- To Do:
  - Define Approval Review Process: who is the final publisher? Manager, KB Admin, SME for technical accuracy
  - Define Agent Answer Creation Process:
    - Agent modifies incident, creates answer and selects propose
    - KB team reviews, edits and formats the proposed answer and publishes it for public view
  - Define review dates, roles, and KB team
    - Who develops content, how often are answers reviewed

KB Roles Defined

- KB Manager – reviews KB reports for success measurements, standardization
- Content Owner/SME – the subject matter expert, usually found across the organization in a specific department or business, authors new answers
- Technical/Grammar Review – the one previewing the answer for punctuation, spelling, grammar before publishing answer to public
- KB Admin – Initial point of contact for proposed incidents, aged out answers, setting reviews, maintain approvals and answer feedback

Content Ownership

- Determines who owns what
- Ownership can be determined based on categories etc
- Owners are responsible for ensuring that content is accurate

Content	Owner
Site Help	Web Master
Careers	HR
Business Process	Operations
Promotions	Marketing
Tips	SME's
Account Info	Accounting

Answer Feedback

- Letting the technology do the work and evolve your content based on demand and usage
- Define process for answer feedback (Set up rule to send low scoring answers for improvement as well as reports for managers and KB admin. Answer feedback is a link below answer that has a source of Answer Feedback)

Ongoing Success

- KB Tuning every 6 months
  - First time, outsource this for best practices
  - Ongoing, KB Manager owns
    - Identify most used search terms
    - Find/create answers to match search terms
    - Perform a search
    - Evaluate results
      - Are you getting results
      - Review reports (GAP, keyword, KB Performance Dashboard
      - Evaluate results for all answer types (file attachments, URLs, Web)
    - Repeat steps above

APPENDIX C – LARGER KB BUSINESS WORKFLOWS

Figure 11: SCR Propose Answer Workflow

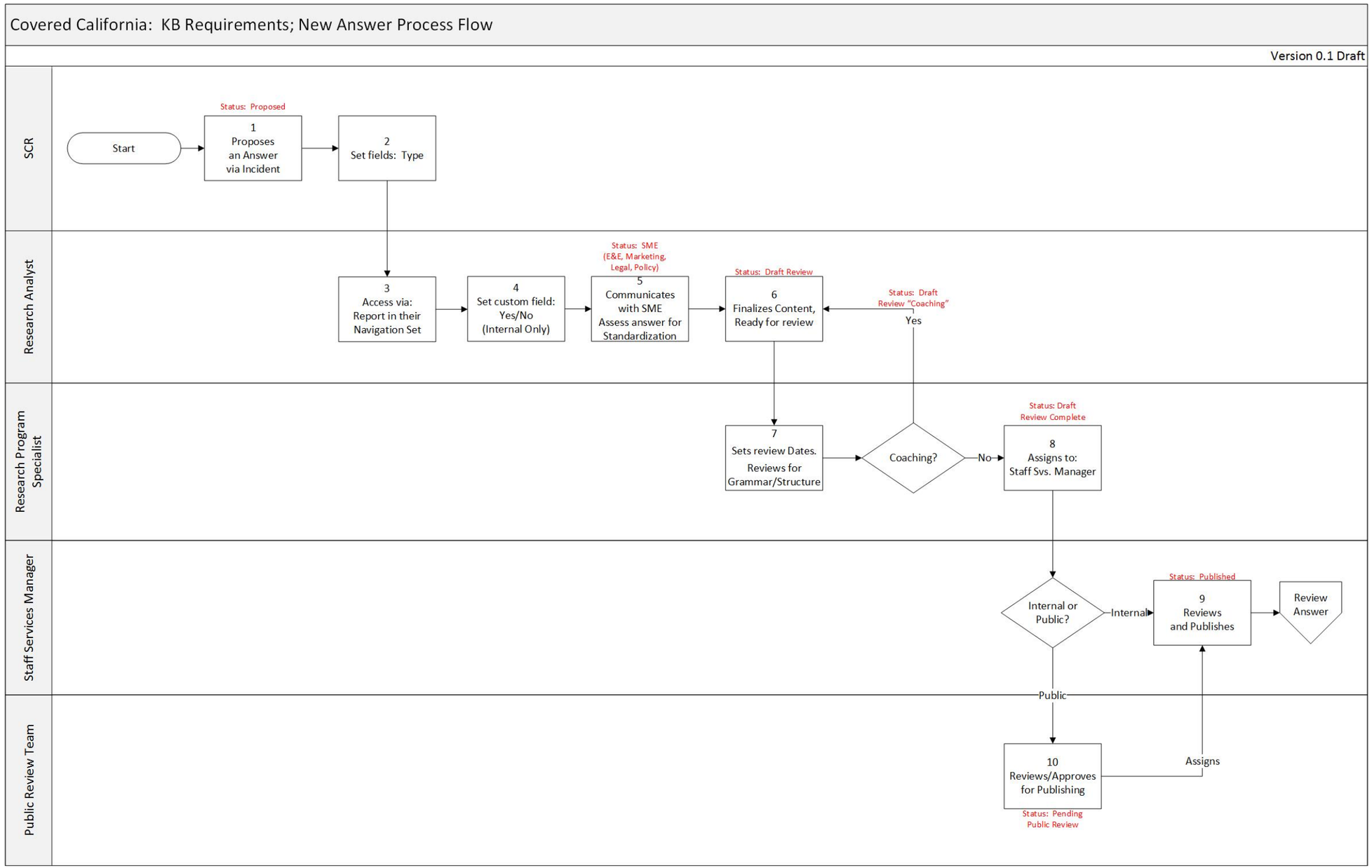


Figure 12: Content Management Team, Create New Answer

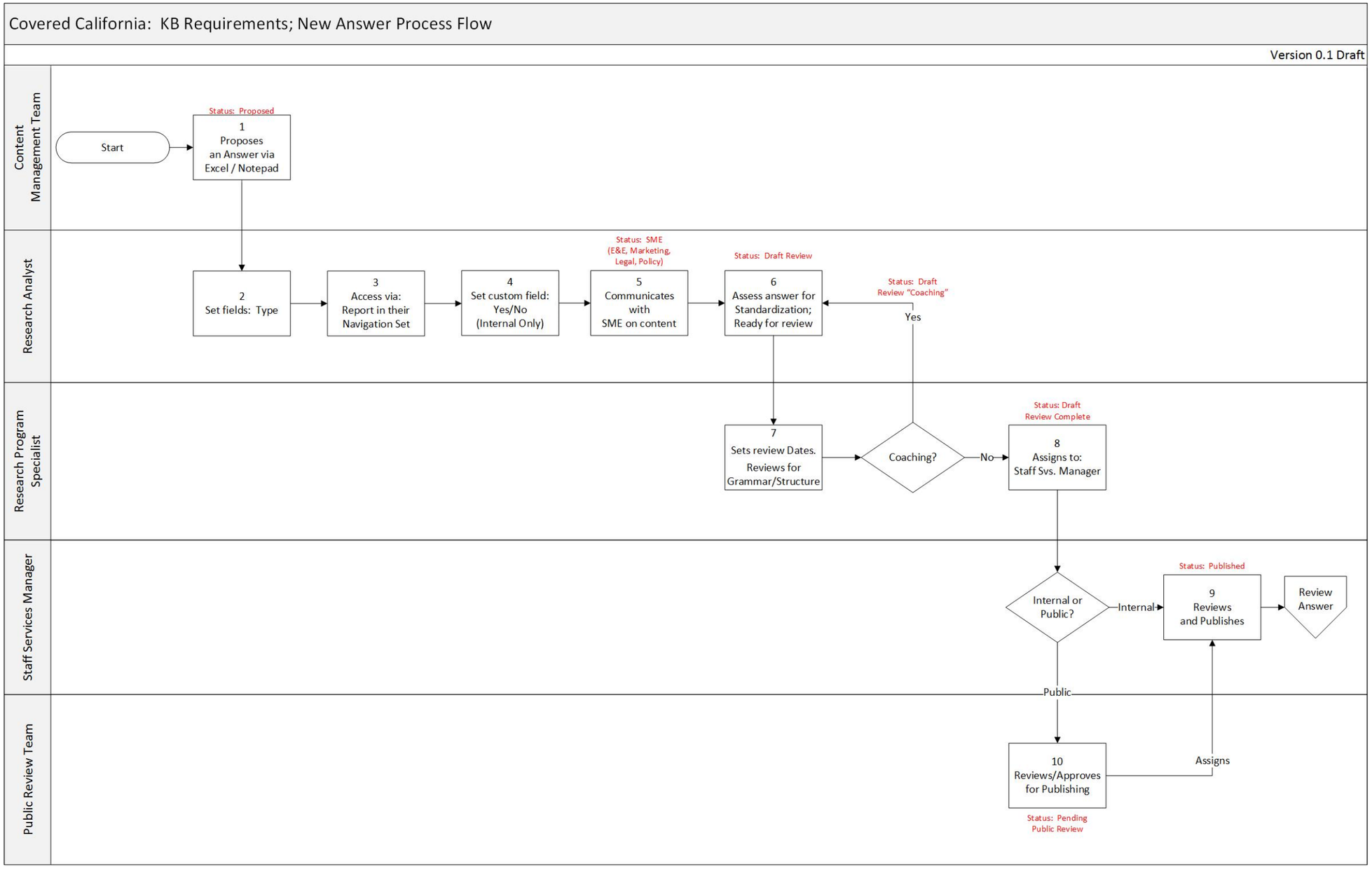


Figure 13: Review Answer Process Flow

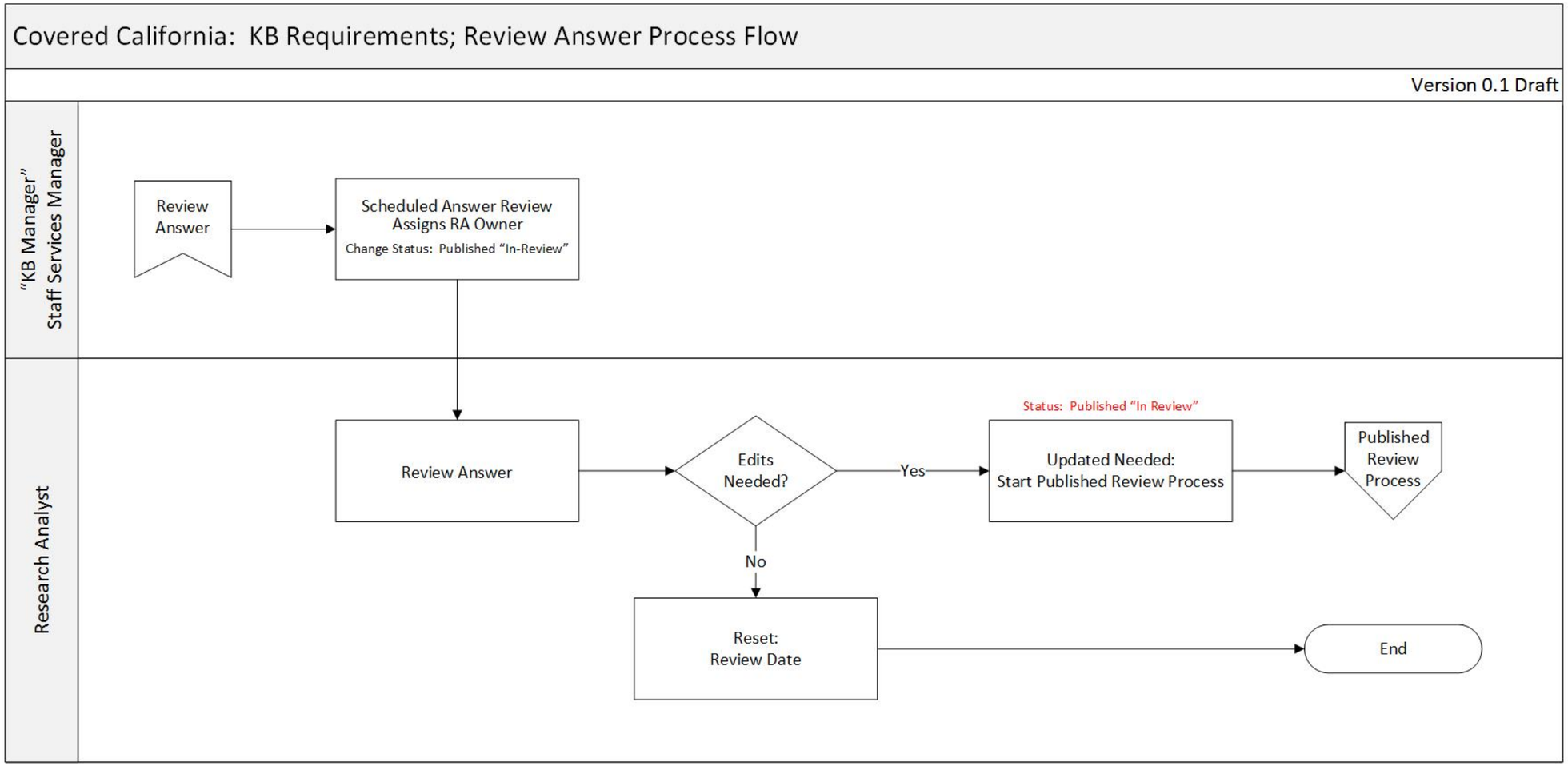
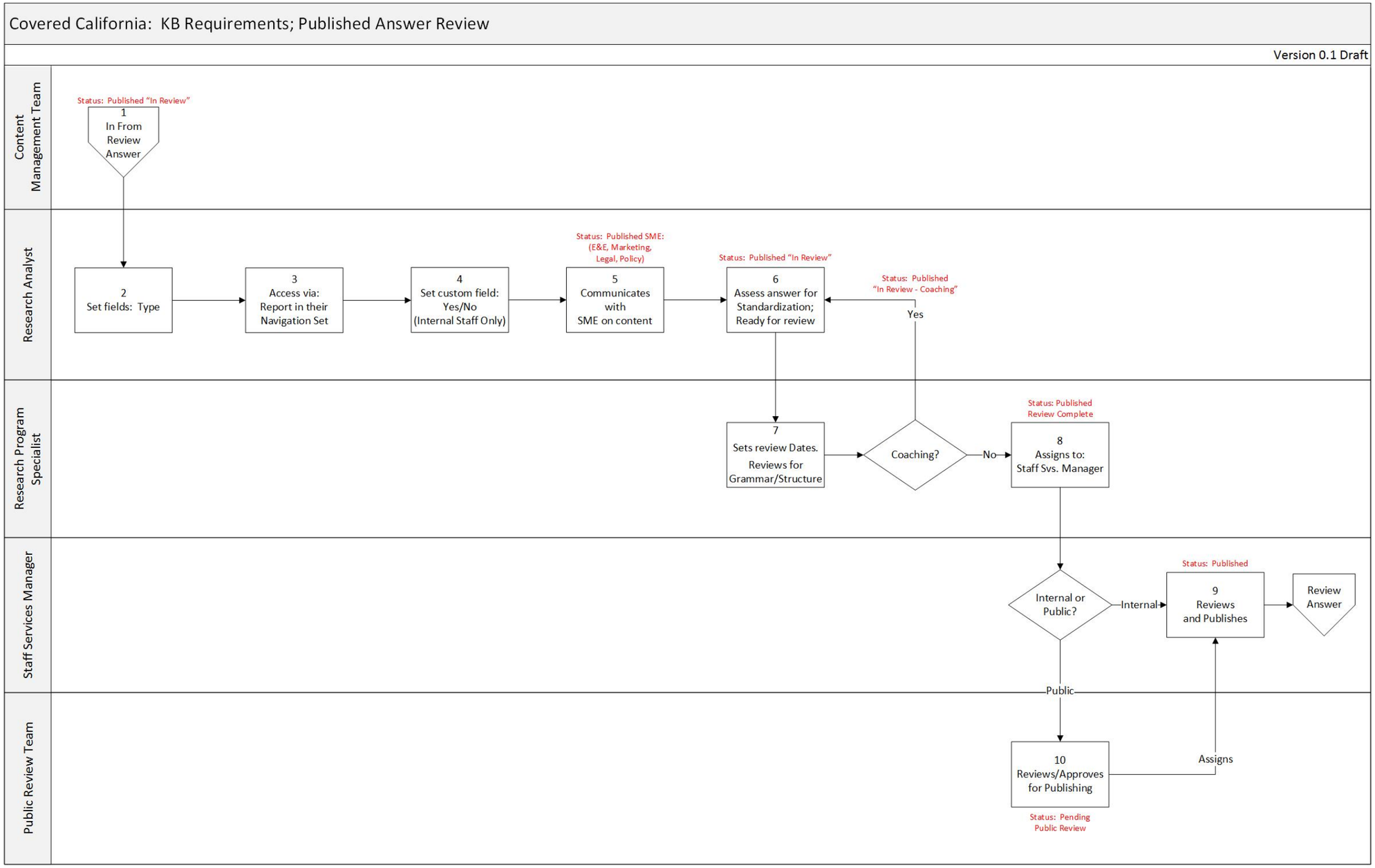


Figure 14: Published Answer Review



CRM Operational Support and Knowledge Base (KB) Alignment to Business Practices

Knowledge Base Solution Design Document

Version 0.2 Draft

PREPARED FOR:

COVERED CALIFORNIA

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TABLE OF CONTENTS

Table of Contents ii
List of Tables iv
List of Figures iv
Revision Record v
Reviewers v
Approvals v
1 Overview 6
1.1 Purpose 6
1.2 KB Best Practices 8
1.3 Intended Audience 8
1.4 Anticipated Additions and Revisions 8
2 Component: Propose an Answer 10
2.1 Process Discovery 10
2.2 User Story Steps 11
3 Component: Creating New Answers 12
3.1 Process Discovery 12
3.2 User Story Steps 13
4 Component: Review Answers 14
4.1 Process Discovery 15
4.2 User Story Steps 15
5 Component: Transition Plan from Existing to New Answers 17
5.1 CRM Transition Process 17
5.2 Determine Team involved in clean up 19
5.3 Article Data Migration Process 19
5.4 Bring KB Live – Change Management Process 20
6 Component: SharePoint 21
6.1 SharePoint Propose Answer 21
6.2 SharePoint Review Answer 21
6.3 Share Point New Answer 21
7 Component: KB Administration 22
7.1 KB Navigation Sets 22
7.2 KB Answer Workspace 23

7.3 SCR Propose Workspace 24
7.4 Answer Workspace Rules 24
7.5 Answer Statuses 25
7.6 Product, Categories, and Dispositions ..... **Error! Bookmark not defined.**
8 Component: Customer Portal 26
8.1 General Requirements 26
8.1.1 Login Requirements 26
8.1.2 Customer Portal "Branding" 26
8.1.3 Contact Us Web Form / Ask Page 27
8.1.4 Live Chat Page 27
8.1.5 Home Page 27
8.1.6 Search Widget 27
8.1.6.1 Advanced Search 27
8.1.7 Featured Support Topics (Categories/Call Types) Widget 28
8.1.8 Most Popular Answers Widget 29
8.1.9 Home Page Layout 30
8.1.9.1 Option1 30
8.1.9.2 Option 2 31
8.1.9.3 Option 3 31
8.2 Answer List Page 31
8.2.1 Search Widget 33
8.2.1.1 Advanced Search 33
8.3 Answer Detail Page 34
8.3.1 Feedback Widget 34
8.3.2 Answers Others Found Helpful Widget 35
8.3.3 Previously Viewed Answers Widget 35
Appendix A – Taxonomy 38
Appendix B – KB Best Practices 41
Appendix C – Larger KB Business Workflows 57

LIST OF TABLES

Table 1: Discovery and Requirements Gathering Interactions 7
Table 2: Component Iteration Status 9
Table 3: R.25 Knowledge Admin Navigation Set 22
Table 4: R.25 Knowledge Manager Navigation Set 22
Table 5: Answer Workspace Rules 24
Table 6: Answer Statuses 25

LIST OF FIGURES

Figure 1: Propose an Answer 10
Figure 2: SCR Propose Answer Workflow 10
Figure 3: Content Management Team, Create New Answer 13
Figure 4: Review Answer Process Flow 15
Figure 5: Published Answer Review 16
Figure 6: Search Knowledge Base 17
Figure 7: Search Knowledge Base 18
Figure 8: Knowledge Base Filters 19
Figure 9: KB Answer Workspace 23
Figure 10: SCR Propose Workspace 24
Figure 11: SCR Propose Answer Workflow 57
Figure 12: Content Management Team, Create New Answer 58
Figure 13: Review Answer Process Flow 59
Figure 14: Published Answer Review 60

Revision Record

Version Number	Status	Date	Sections	Author	Change Description
v0.1	Draft	02/3/15	N/A	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	Added Customer Portal Requirements for KB

Reviewers

Name	Organization/Role	Date
[redacted]	[redacted]	2/5/2015

Approvals

Approver Name	Title	Status / Updates	Date
[redacted]	[redacted]		
[redacted]			
[redacted]	[redacted]		

Comment – Review and Discuss

Process – Define and communicate to team

Training – Ensure this is included in staff training

1 OVERVIEW

As a part of the Patient Protection and Affordable Care Act (Affordable Care Act) implementation, the State of California established the California Healthcare Eligibility, Enrollment, and Retention System (CalHEERS) Service Center. The Service Center addresses customer inquiries regarding healthcare policy changes, insurance eligibility, as well as the application, processing and appeals of customer healthcare options. Service Center Representatives (SCR) will leverage content in the Oracle RightNow Knowledge Base to guide the interaction with the Customer, and provide resolution to customer inquiries. Covered California partners (CECs, CIAs, and SHOP Agents) and customers will also access content through the public website. Customers are defined as those using the consumer-facing system, into which individuals, families, and enrollment assisters input application information for individuals applying for public insurance programs. This consumer-facing system allows consumers to shop for health plans and make side-by-side comparisons of the different plans available in Covered California.

1.1 PURPOSE

The purpose of the Knowledge Base (KB) is to create and foster dynamic answers, stored in one place, that meet the needs of the internal staff when answering questions from the external public whether that's consumer or agent related questions.

The purpose of this KB Solution Design Document (SDD) is to:

- Provide a foundation for the KB Configuration Team to configure KB and address the following[1]:
  - Keyword search for articles leveraging Knowledge search engine
  - Article templates
  - Knowledge Categories
    - Article security and access profiles
    - General access from.com
- Article management (reviewing answers)
- Article authoring (creating new answers)
- Flag/submit article comments
- Request/draft new articles
- Article review and approval workflow
- Search public KB from "Customer Portal" or "Web Self Service" website
- Standard KB reports and Dashboards

1 [redacted]
- Exhibit A, Section D Knowledge Base Alignment to Business Practices
- Exhibit A, Section E.2 Knowledge Base Management Taxonomy, Templates and Script/article framework and best practices, Section E.6 Knowledge Base improvements plan, schedule and artifacts, Section E.7 Basic 'Out-of-the-box' Report and Dashboard configuration for RightNow Knowledge Base, Section E.8 RightNow Knowledge Base configuration, Section E.9 Data migration for Knowledge Articles, and Section E.10 RightNow Customer Portal and Knowledge Base Content
- Exhibit E, Section 1, Subsection B KB Improvement Plan, Subsection D Plan and Conduct Data Migration, Subsection E Verify and Refine the RightNow "Out-of-the-Box" Configuration
- Exhibit E, Section 2, Subsection A Taxonomy, Templates and Framework, Subsection C RightNow Interaction Connections

As a reference tool for configuration, this document serves as the basis for communication between the Covered California IT, Covered California University, and the [redacted] Team and its content will be comprehensive but easily understandable. Below is the overall Knowledge Base (KB) Solution Design resulting from discovery and requirements gathering sessions with the Covered California University (CCU) team. The following table outlines the discovery and requirements interactions.

Table 1: Discovery and Requirements Gathering Interactions

TOPIC	SUBJECT MATTER EXPERTS ATTENDEES	DATE
KB Pre-Requirements Meeting	[redacted]	20 Jan, 2015
KB Requirements Meeting	Sondel Fermer (Covered CA), Helen Hejek (Covered CA), Gloria Simas (Covered CA), Rene Cooper (Covered CA), Kathleen Newman (Covered CA), Brenda O'Brien (Covered CA), Tracey Ruport (CoveredCA), Brett Bruderer ([redacted] Team), Katie Hamaker ([redacted] Team), Nancy Kvale, Cade Gorman (Oracle)	21 Jan, 2015
KB Requirements Meeting	Sondel Fermer (Covered CA), Helen Hejek (Covered CA), Gloria Simas (Covered CA), Rene Cooper (Covered CA), Kathleen Newman (Covered CA), Brenda O'Brien (Covered CA), Tracey Ruport (CoveredCA), Brett Bruderer ([redacted] Team), Katie Hamaker ([redacted] Team), Nancy Kvale, Cade Gorman (Oracle), Zaid Ridha (Covered CA), Donna Whittington (Endeavor Consulting Group)	23 Jan, 2015
KB Requirements Meeting	Sondel Fermer (Covered CA), Helen Hejek (Covered CA), Gloria Simas (Covered CA), Rene Cooper (Covered CA), Kathleen Newman (Covered CA), Brenda O'Brien (Covered CA), Tracey Ruport (CoveredCA), Brett Bruderer ([redacted] Team), Katie Hamaker ([redacted] Team), Nancy Kvale, Cade Gorman (Oracle), Donna Whittington (Endeavor Consulting Group)	27 Jan, 2015
KB Requirements Meeting	Sondel Fermer (Covered CA), Helen Hejek (Covered CA), Gloria Simas (Covered CA), Rene Cooper (Covered CA), Kathleen Newman (Covered CA), Brenda O'Brien (Covered CA), Tracey Ruport (CoveredCA), Brett Bruderer ([redacted] Team), Katie Hamaker ([redacted] Team), Nancy Kvale, Cade Gorman (Oracle), Donna Whittington (Endeavor Consulting Group), Armando Hernandez (Covered CA), CCU Research Analyst Team	28 Jan, 2015

[redacted]

1.2 KB BEST PRACTICES

Please see Appendix B – KB Best Practices, for rules and framework that have been provided to Covered CA Staff. This set of Best Practices is built to govern all KB component areas, as well as provide overarching ruleset to apply to all activities and components of this document.

1.3 INTENDED AUDIENCE

All answers in the Knowledge Base will exist to assist Covered California staff, Covered California Partners, and consumers resolve issues or answer questions about their healthcare coverage. .

1.4 ANTICIPATED ADDITIONS AND REVISIONS

This SDD is the initial version to memorialize the basic flows and enable configuration to initiate. Owing to the recommended approach to use Agile principles, the SDD will continue to be updated as future iterations are confirmed. The table below outlines the “full” anticipated structure.

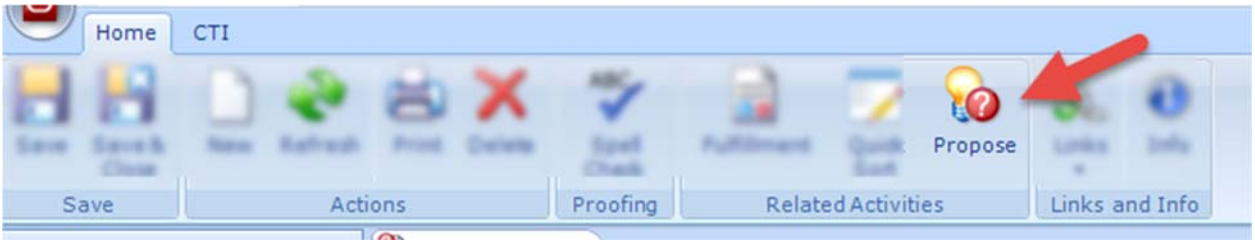
Table 2: Component Iteration Status

COMPONENT	STATUS
Propose an Answer	Base configuration in this SDD
Create a New Answer	Base configuration in this SDD
Review Answers	Base configuration in this SDD
Transition Plan from Existing to New Answers	Base configuration in this SDD, except section 5.3 which component anticipated at a future date determined by [redacted] and Covered California
SharePoint	Iterated at a future date, except section 6.2 and 6.3 which component anticipated at a future date determined by [redacted] and Covered California
KB Admin	Base configuration in this SDD, except
Customer Portal	Base configuration in this SDD, Static FAQs from Customer Portal
Appendix A: Taxonomy	Initial definitions for functions referenced in other components
Appendix B: Best Practices	KB Best Practices
Appendix C: Larger Process Figures	Larger Process figures for figures: SCR Propose Answer Workflow, Content Management Team Create New Answer, Review Answer Process Flow, and Published Answer Review

2 COMPONENT: PROPOSE AN ANSWER

If new KB content is required to address a Customer inquiry, Covered California staff will be trained to propose a new article (Question and Answer pair, Subject and Content pair) which would be added to the KB. Staff can propose an answer to the Knowledge Base via an incident. This button is found on the ribbon in the incident editor. The Research Analyst (RA) will be the first responder to the proposed answer and act as the advocate, actively engaging the required team members needed to get the answer public and consumable by the appropriate audience.

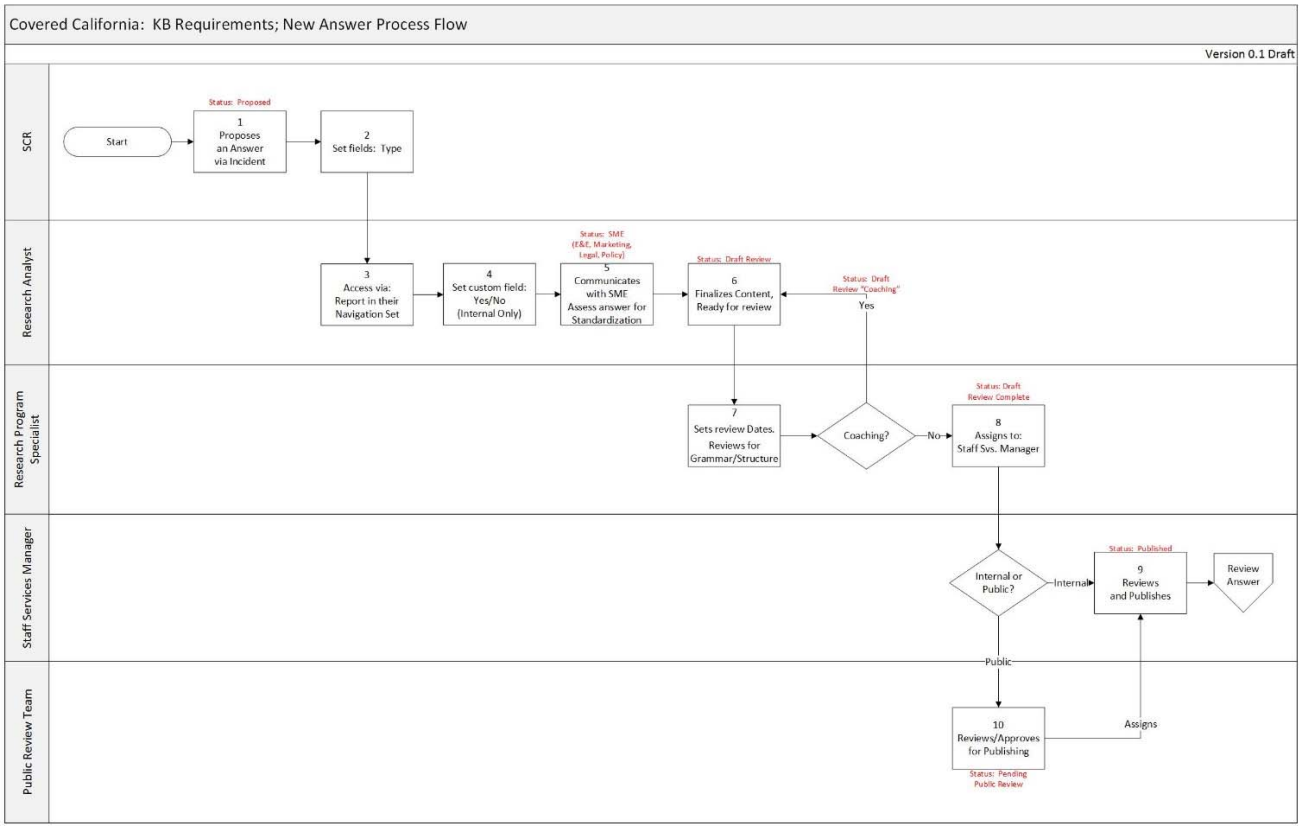
Figure 1: Propose an Answer



2.1 PROCESS DISCOVERY

The process for handling a proposed answer in CRM will be as follows:

Figure 2: SCR Propose Answer Workflow



Please see Figure 11: SCR Propose Answer Workflow in Appendix C to view larger version of process flow.

2.2 USER STORY STEPS

1. Research Analyst (RA) will access proposed answers via a report called "Proposed Answers" from the KB Admin navigation set.

2. RA will review proposed answer, determine if answer is for internal staff only, determine if a Subject Matter Expert (SME) is required, determine answer Priority (Outdated, Urgent, No Value), review for answer standardization, and if the proposed answer already exists in the KB. All of the above review will require internal business process training or checklist that falls outside of configuring the KB.

3. Based upon above consideration, RA will update the answer status from Proposed to one of the following answer statuses.

    a. Draft SME: Content Development
    b. Draft Review

    The Content Development team will track and manage answers referred to SMEs in other business units as they conduct the research necessary to finalize contents. Upon Content Development SME completion, the RA will update the answer and set the status to Draft Review.

4. The Research Program Specialist (RPS) will access a report and filter answers with a status of Draft Review. The RPS will set review by dates, validate answer priority, review for grammar and standardization. The RPS will update the status to Draft Review Coaching and provide comments in the notes tab of the workspace if work is still needed on the answer. Based upon RPS consideration, the RPS will update the answer status to one of the following statuses:

    a. Draft Review Coaching
    b. Draft Review Complete

5. The RA will access a report filtered by logged in user, showing only answers in a Draft Review Coaching status and make changes requested by the RPS. The Draft Review Coaching status was added to help provide a more efficient learning curve between the RA and the RPS on what it takes to make an answer consumable by the end user.

6. Once the RA has addressed all RPS comments, the RPS will change the status to Draft Review Complete.

7. The SSM will access a report filtered by logged in user, showing only answers in a Draft Review Complete status. The SSM reviews the article and updates the answer status to any one of the following statuses:

a. Pending Public Review
b. Published
c. Published Temporary

8. Once the answer is ready for public consumption the SSM will either set the status to Published (if the answer is only consumable by internal staff), Published Temporary, or set the answer to Pending Public Review.

9. Public Review is a business process that has not yet been determined. Once the process has been determined and approved, the process will outline the final review an answer needs to go through to be ready for consumption by people outside of Covered California (agents and consumers).

3 COMPONENT: CREATING NEW ANSWERS

KB Team has the ability to generate, manage, and publish answers to frequently asked questions and solutions for use by Service Center Representatives (SCRs) and other users.

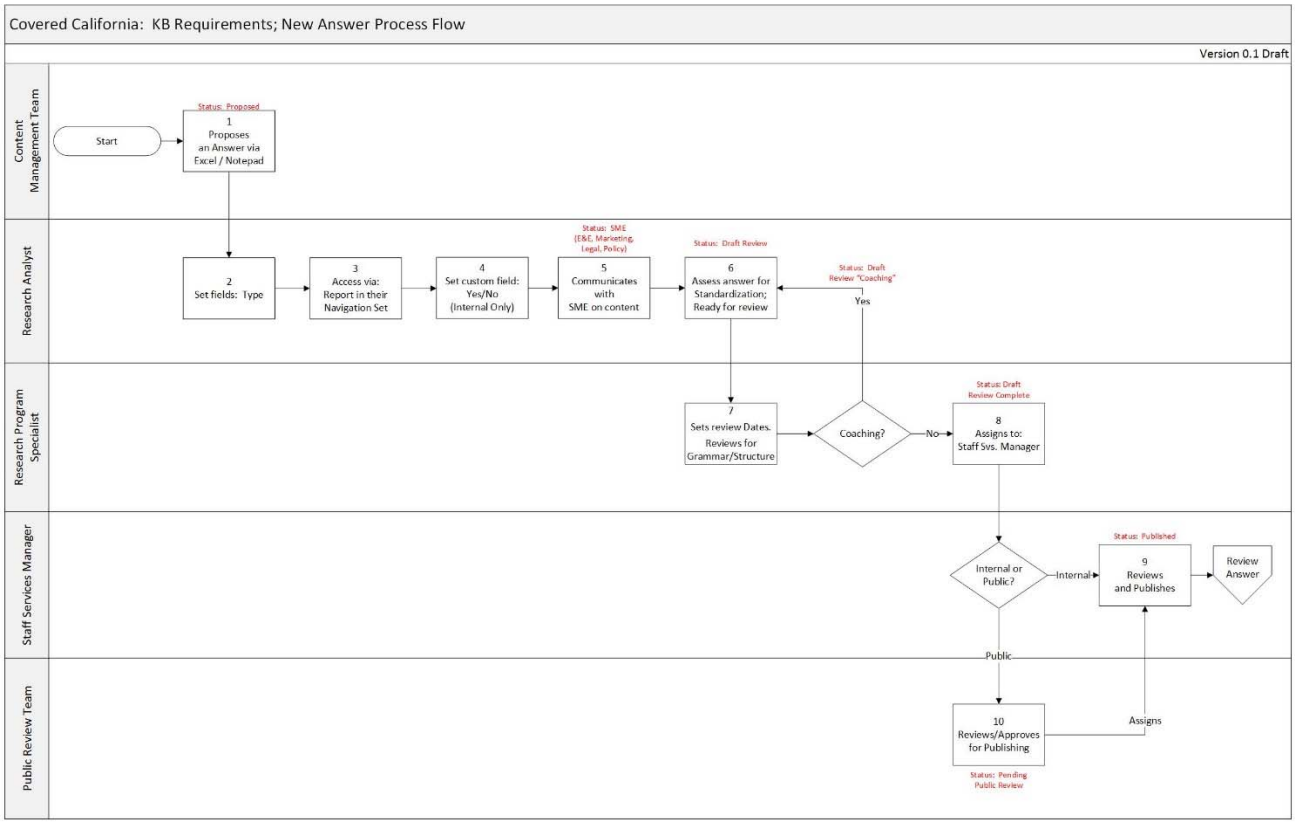
When a Customer reaches out to Covered California's Service Center, the Service Center Representative leverages articles in KB to answer customer inquiries. The Knowledge Base is the central repository of information available to SCRs to process a customer inquiry. Articles are uploaded to KB in formats including Scripting, Question and Answer Pairs, Procedure Documents and Standard Text.

Users are able to search KB by Keywords, Subject, Incident Type, and Contact Type.

New answers will be created using content from master documents stored in SharePoint; relevant content will be manually entered into the Knowledge Base. All CCU Training and KB content will be developed from these "master documents" ("single source of truth").

3.1 PROCESS DISCOVERY

Figure 3: Knowledge Base Team, Create New Answer



Please see Figure 12: Content Management Team, Create New Answer in Appendix C to view larger version of process flow.

3.2 User Story Steps

1. RA will access new answers via a report called "New Answers" from the KB Admin navigation set.

2. RA will review new answer and review for answer standardization. The RA will also determine answer Priority (Outdated, Urgent, No Value). The standardization review will require internal business process training that falls outside of configuring the KB.

3. Based upon above consideration, RA will update the answer status from New Answer to Draft Review.

4. The Research Program Specialist (RPS) will access a report and filter answers with a status of Draft Review. The RPS will set review by dates, validate answer Priority, review for grammar and standardization. The RPS will update the status to Draft Review Coaching and provide comments in the notes tab of the workspace if work is still needed on the answer. If no additional work is required, the RPS will update the status to Draft Review Complete. The RPS will update the answer status to one of the following statuses:

   a. Draft Review Coaching
   b. Draft Review Complete

5. The RA will access a report filtered by logged in user, showing only answers in a Draft Review Coaching status and make changes requested by the RPS. The Draft Review Coaching status was added to help provide a more efficient learning curve between the RA and the RPS on what it takes to make an answer consumable by the end user.

6. Once the RA has addressed all RPS comments, the RPS will change the status to Draft Review Complete.

7. The SSM will access a report filtered by logged in user, showing only answers in a Draft Review Complete status. The SSM reviews the article and updates the answer status to any one of the following statuses:
   a. Pending Public Review
   b. Published
   c. Published Temporary

8. Once the answer is ready for public consumption the SSM will either set the status to Published (if the answer is only consumable by internal staff), or set the answer to Pending Public Review.

9. Public Review is a business process that has not yet been determined. Once the process has been determined and approved, the process will outline the final review an answer needs to go through to be ready for consumption by people outside of Covered California (agents and consumers).

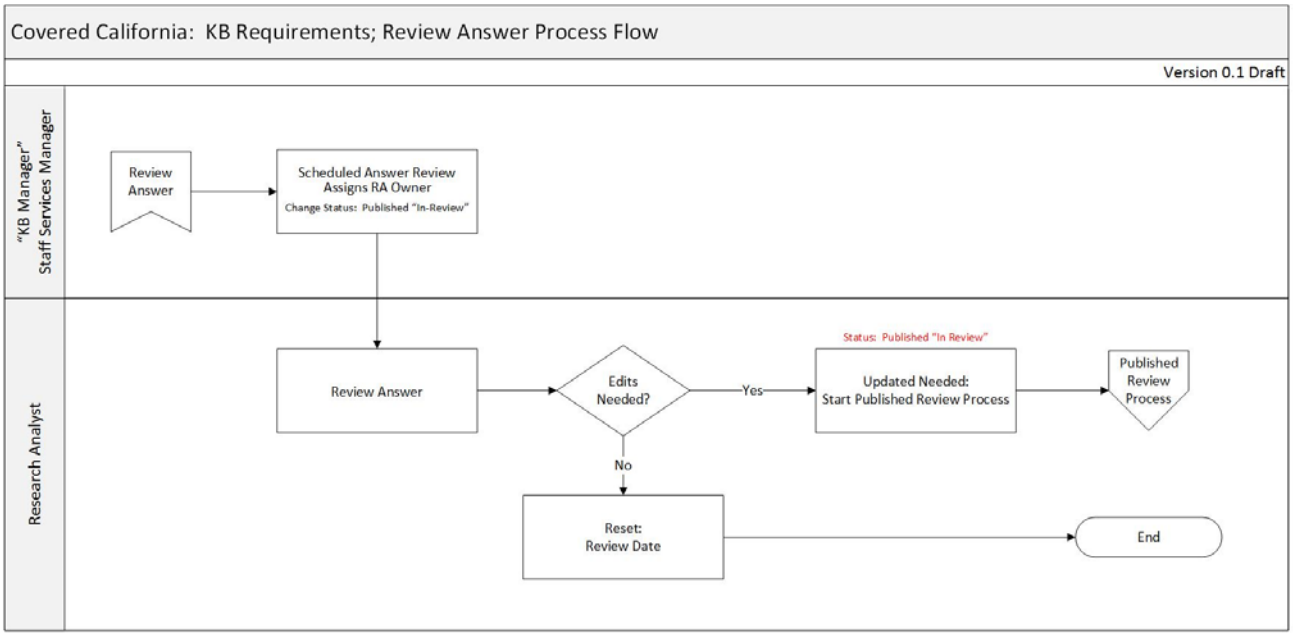
4 COMPONENT: REVIEW ANSWERS

The Review Answers component is the process that the KB team will go through when an answer has an upcoming review date. The review process is meant to manage the following:

- Review public answers and keep them public while still in review
- Determine which answers need to be archived and set to a status type of private
- Review the most pressing answers first

4.1 Process Discovery

Figure 4: Review Answer Process Flow



Please see Figure 13: Review Answer Process Flow in Appendix C to view larger version of process flow.

4.2 User Story Steps

- The KB Manager will view a report called the Answer Review report that shows all answers about to go into a review status within the month. The report will show the upcoming months and the number of answers to be reviewed within each month. The report will drill down into the details of the answer to be reviewed. It will show Priority and other key fields to help the KB Manager assign the answers to the KB Admin team before the answer expires.

- SSM accesses Answer Review Report in Navigation Set.

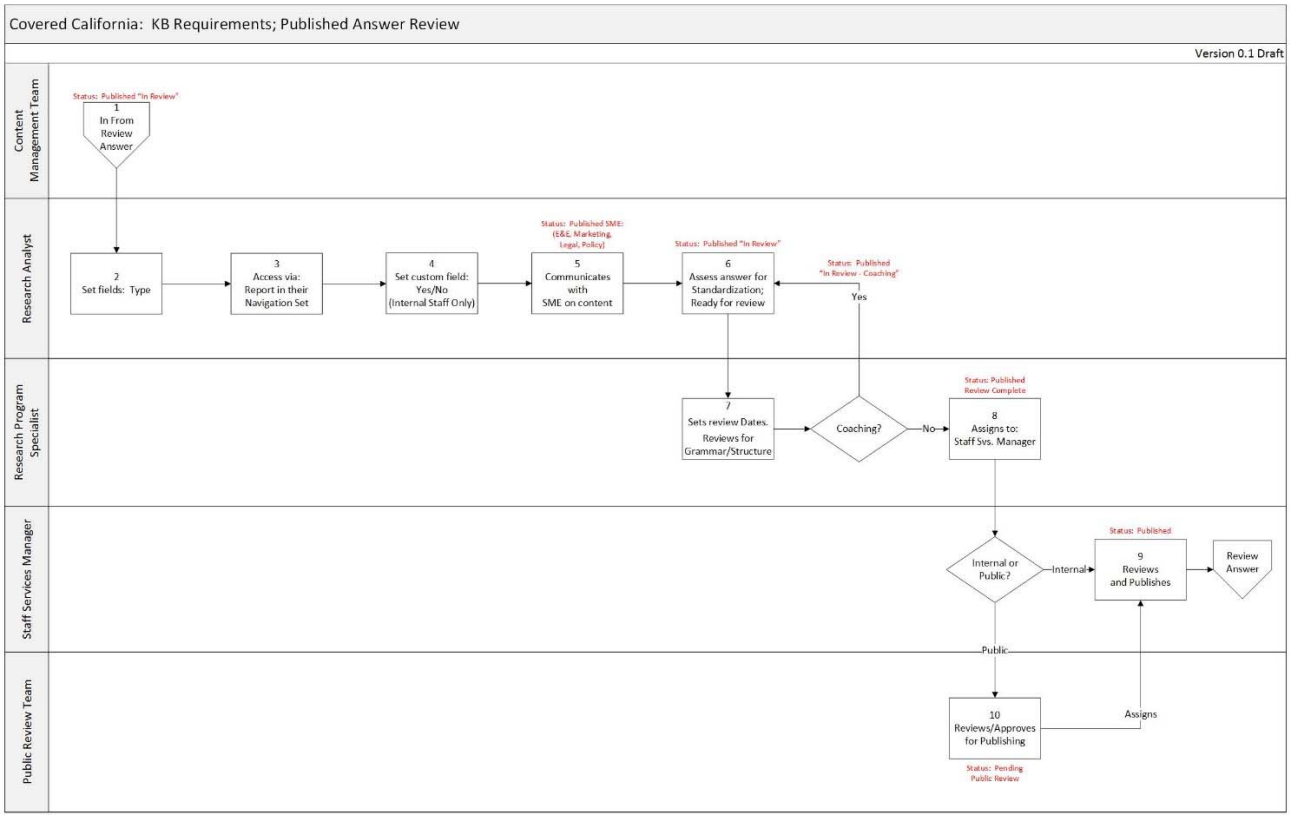
- SSM assigns the answers out to the KB Admin team and sets the status to Published – In Review.

- RA team member logs in to access report of answers assigned to the logged in user and have a status of Published – In Review.

- If a published answer needs review, the status gets updated to Published SME: Content Development .

The CCU Content Development Team is responsible for contacting SMEs and developing "source content" that all KB content will be derived from. The Content Development Team will manage this work outside the KB system. Upon completion of Content Development – SME review, the RA will use the information provided to update the answer, conduct a final review for grammar and standardization, and set the status to 'Published in Review'.

Figure 5: Published Answer Review



Please see Figure 14: Published Answer Review in Appendix C to view larger version of process flow.

- The Research Program Specialist (RPS) will access a report and filter answers with a status of 'Published In Review'. The RPS will set review by dates, verify answer Priority, review for grammar and standardization. The RPS will update the status to 'Published In Review - Coaching and provide comments in the notes tab of the workspace if work is still needed on the answer. If no additional work is needed, the RPS will change the status to 'Published – Review Complete.' The RPS will update the answer status to anyone of the following statuses:

    a. Published Review Complete
    b. Published Temporary

5 Component: Transition Plan from Existing to New Answers

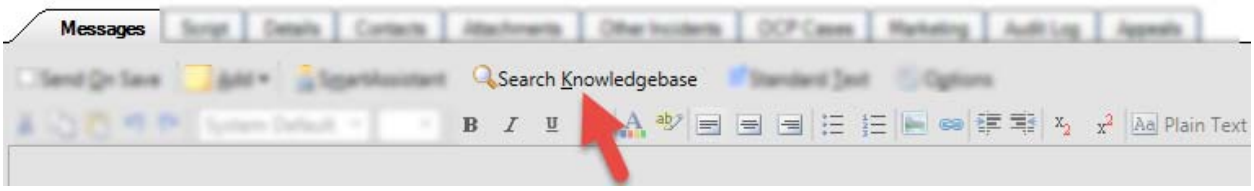
The transition plan from existing answers to new answers is meant to address the following:

- Document a process for transitioning from the old answers to the new answers with as minimal interruption as possible for the internal staff.
- Learn best practices when creating answers and apply them to updates
- Bring new KB live and create excitement and buy-in for a revitalized KB.
- Determine the teams involved in the clean-up process and identify timelines for completion.

5.1 CRM Transition Process

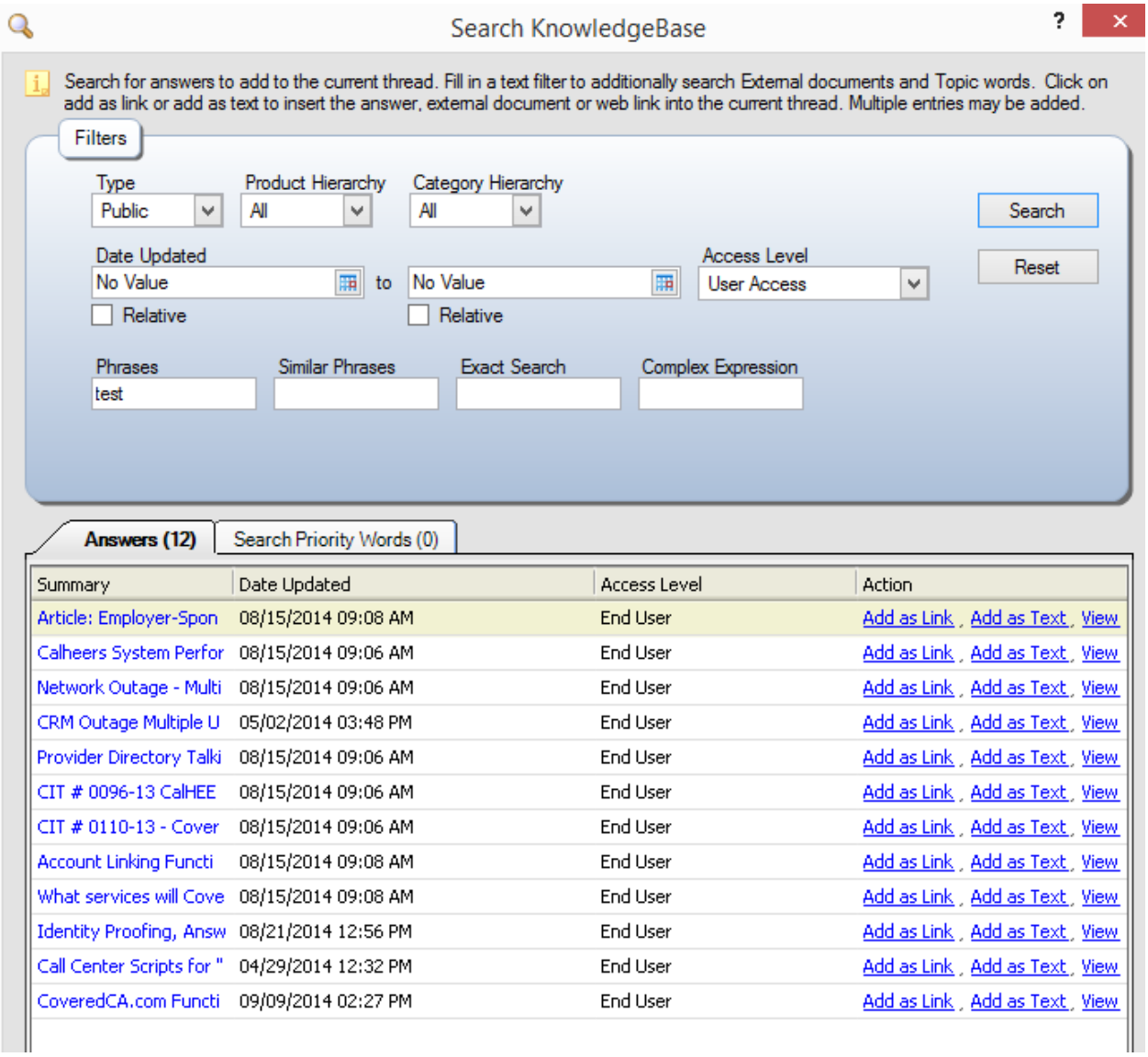
Internal Staff using CRM currently use the Search Knowledge Base on an incident to find answers.

Figure 6: Search Knowledge Base



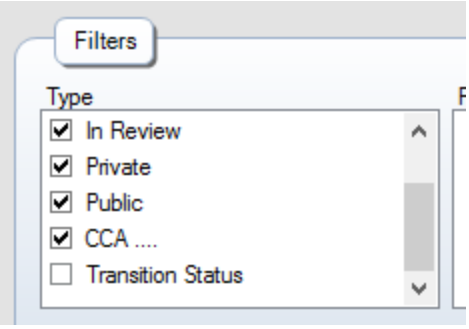
When the team member clicks on Search Knowledge Base a report helps the staff member find answers related to the incident.

Figure 7: Search Knowledge Base



This report will include a modified filter that forces the staff member to only see specific statuses that will not include the new answer. The example below is a sample of what it could look like and does not accurately represent the actual answer statuses. Since the test site is also a training site, I could not capture this level of detail. To see the actual answer statuses being proposed, see section 7.5 Answer Statuses.

Figure 8: Knowledge Base Filters



5.2 DETERMINE TEAM INVOLVED IN CLEAN UP

KB Admin team and a Service Center SME team will both be involved in the clean-up process:

1. KB Team will put all answers into specific buckets. The buckets are defined as follows:
    a. Internal HR Process – Shift Change, Evacuation Process
    b. CIT/CalHEERS System Updates
    c. Task Guides/Job Aids
    d. Training (includes PPTs)
    e. Consumer Notices
    f. Press Releases
    g. Market Collateral
    h. Not Needed

2. KB Manager and PM team to identify a Service Center SME team member to represent each of the buckets.

3. KB Team to use Service Center SME team input and Answers Most Utilized report to determine the most used and most important answers to transition and rewrite into new KB.

4. KB Admin team to break out existing long answers and separate into a number of smaller answers using KB best practices as guidelines.

5. Remaining business processes needs further review as well, and to monitor the functionality of this team once KB is live with real world content.

5.3 ARTICLE DATA MIGRATION PROCESS

Component anticipated at a future date determined by [redacted] and Covered California

5.4 BRING KB LIVE – CHANGE MANAGEMENT PROCESS

1. Identify all answers used by the internal staff and fix those prior to implementation
2. Review and refine answers by testing search with supportive change agents
3. Define Go-live plan
4. Provide train the trainer session
5. Train teams on new KB, search best practices, and easy to use answers
6. Go-live

6 COMPONENT: SHAREPOINT

SharePoint currently stores all internal documentation. The interactive connection between SharePoint and KB is still in Requirements and Discovery phase.

6.1 SHAREPOINT PROPOSE ANSWER

Internal Staff proposes an answer from an incident using Propose button on ribbon

- KB Team searches Knowledge Base for existing answer.
- If no answer exists, KB Team works with Content Development team to create new content (master document) which will be stored in Share Point.
- Once written, reviewed, proofed, new answers are manually created in the KB from source documents in SharePoint. KB content will tie back to master document for content tracking and maintenance purposes.

6.2 SHAREPOINT REVIEW ANSWER

Component anticipated at a future date determined by [redacted] and Covered California

6.3 SHARE POINT NEW ANSWER

Component anticipated at a future date determined by [redacted] and Covered California

7 COMPONENT: KB ADMINISTRATION

This section represents the administrative portion of the KB Administration team. It defines how the navigation sets will look, the answer workspaces along with any workspace rules and custom fields. It details answer statuses and the definition for each.

7.1 KB NAVIGATION SETS

Table 3: R.25 Knowledge Admin Navigation Set

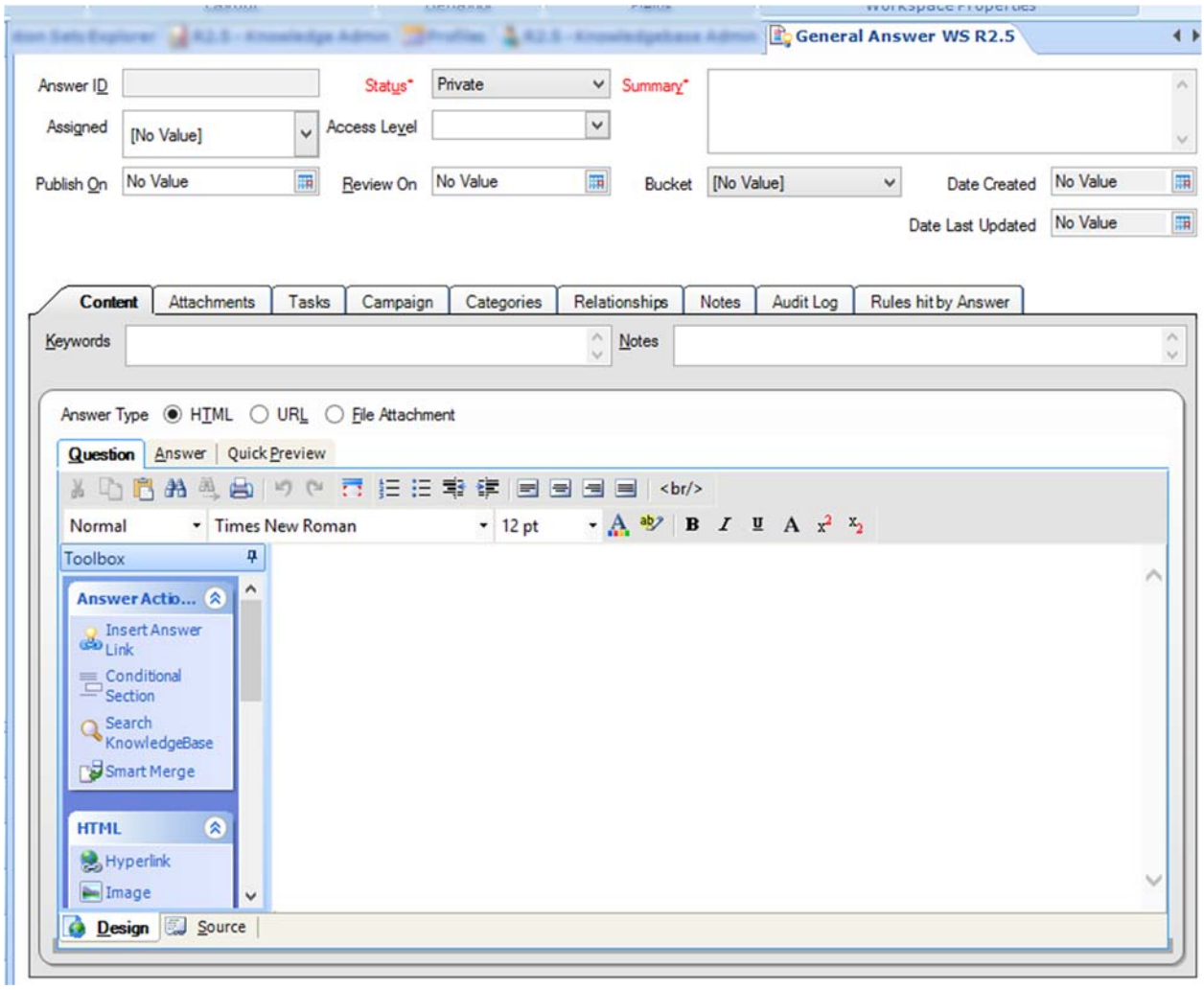
HOME	INCIDENTS	CONTACTS	ANSWERS	QUICK SEARCH
My Answers 2.0	Incidents Search	Contacts Search	Answer Search - KB Worker	Answer QuickSearch
Proposed Answers			Hot Answers	Incident QuickSearch
Draft Review			…Keyword Search	
Published Review			Search Priority Words	
Notifications			Answer Stopwords	
New Answers			Answers Utilized by Agents	

Table 4: R.25 Knowledge Manager Navigation Set

HOME	INCIDENTS	CONTACTS	ANSWERS	QUICK SEARCH
My Answers 2.0	Incidents Search	Contacts Search	Answer Search - KB Worker	Answer QuickSearch
Proposed Answers			Hot Answers	Incident QuickSearch
Draft Review			…Keyword Search	
Published Review			Search Priority Words	
Notifications			Answer Stopwords	
New Answers			Answers Utilized by Agents	
Answer Review				

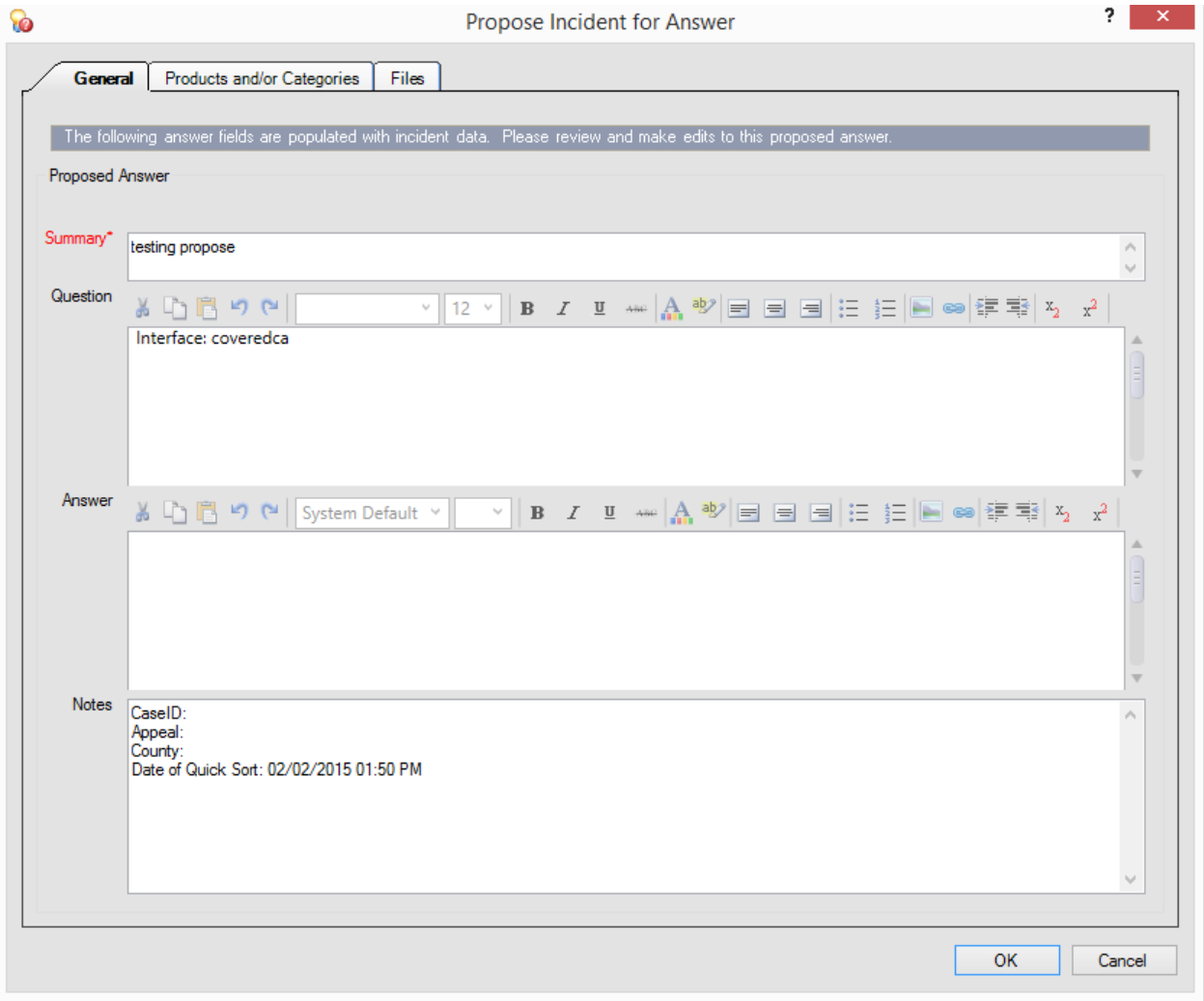
7.2 KB ANSWER WORKSPACE

Figure 9: KB Answer Workspace



7.3 SCR Propose Workspace

Figure 10: SCR Propose Workspace



7.4 Answer Workspace Rules

Table 5: Answer Workspace Rules

Name	When	If	Then
Statuses Available	The editor loads		Set Status to exclude Proposed menu items
Set Default Status	The editor loads	A new record is being created	Set Status to In Review AND Set Access Level to Unspecified
Status = Public	The editor loads OR Status changes	Status equals Public	Set Access Level to End User AND Make Access

NAME	WHEN	IF	THEN
			Level read only AND Make Access Level optional
Status = In Review	The editor loads OR Status changes	Status equals In Review	Make Access Level optional AND Make Access Level editable
Status = Private	The editor loads OR Status changes	Status equals Private	Make Access Level editable AND Make Access Level required
Status = Private AND Access = End User	The editor loads OR Status changes	Status equals Private AND Access Level equals End User	Set Access Level to Unspecified
Multiple Access Levels	The editor loads OR Status changes OR Access Level changes	Status equals Private AND (Access Level equals Private - Not Tier 1, Private - All OR Access Level equals Private - All, End User OR Access Level equals Private - Not Tier 1, End User)	Set Access Level to Unspecified AND Display a message box

7.5 ANSWER STATUSES

Table 6: Answer Statuses

STATUS ID	STATUS TYPE	DEFINITION
New Answer	Private	Status of an answer that gets automatically set by the CRM when a New Answer is created.
Proposed	Private	Status of an answer that gets Automatically set by the system from an agent during the propose answer process
Draft SME: Content Development	Private	RA sets this status when an answer needs SME review by another team in Covered California. The CCU Content Development Team is responsible for creating or updating content and partnering with SMEs to support this process.
Draft Review	Private	RA sets this status when an answer needs review by the RPS for standardization and to set a review date
Draft Review Coaching	Private	Set by the RPS when an answer has been reviewed and is still in need of editing by the RA

STATUS ID	STATUS TYPE	DEFINITION
Draft Review Complete	Private	Set by the RPS when an answer has been reviewed and updated, and is ready for publication.
Published	Public	Set by the SSM when the Draft Review or Published Review stage is complete and then answer is ready for consumption by the end user
Published Temporary	Public	Set by the SSM when an answer has been reviewed and is ready for consumption by the end user but is placed in a temporary status until all existing articles have been transitioned to the new structure OR has a specific date that the answer must be updated by. (Articles placed in Published Temporary Status will not be visible to SCRs until go-live.)
Pending Public Review	Private	Set by the SSM when the Draft Review stage is complete and the answer needs a final review for public consumption. (Note: this team and business process is still yet to be identified)
Published SME: Content Development	Public	Set by the RA when an answer comes up for review and the article needs input or review by another team in Covered California. The CCU Content Development Team is responsible for creating or updating content and partnering with SMEs to support this process.
Published In Review	Public	Set by the SSM when assigning out answers to the KB team that are in need of review
Published In Review Coaching	Public	Set by the RPS when an answer has been reviewed and is still in need of editing by the RA
Published Review Complete	Public	Set by the RPS when an answer has been reviewed and is ready for consumption by the end user

8 COMPONENT: CUSTOMER PORTAL

8.1 GENERAL REQUIREMENTS

8.1.1 LOGIN REQUIREMENTS

Should Login be required on any Customer Portal pages? If so, which ones?

Interface	Login Details	Notes
https://coveredca.custhelp.com/	Not Required / Not Available	All KB content should be available to visitors of the Customer Portal without login restrictions.

8.1.2 CUSTOMER PORTAL "BRANDING"

AmberLeaf will apply Covered CA style sheet (CSS) for the "look and feel" of the Standard out of the box Customer Portal. Covered CA will supply the visual assets (colors, images,

logos, etc.) to be implemented. As discussed during the requirements call phase, the Customer Portal template should be identical to the template used on the official Covered CA website (http://www.coveredca.com/).

8.1.3 Contact Us Web Form / Ask Page

The Contact Us or "ASK" page of the Customer Portal is not required for a Knowledge Base implementation. It is currently outside of the KB implementation scope. By branding the Customer Portal template all pages using the template will also be branded (template.php). If Contact Us/Ask web form is required then another requirements call will be needed to define what fields and business process should be applied to this page.

8.1.4 Live Chat Page

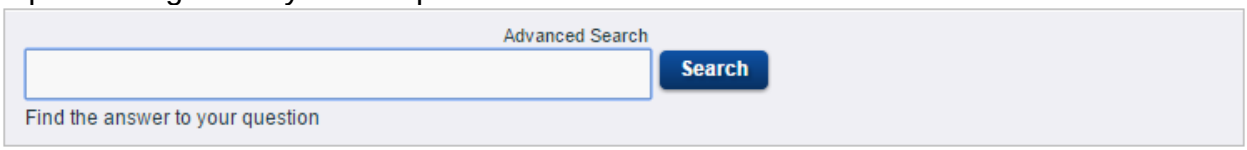
The Chat page of the Customer Portal is not required for a Knowledge Base implementation. It is currently outside of the KB implementation scope. By branding the Customer Portal template all pages using the template will also be branded, however, the chat page is currently using a different template then the one that is being used for the rest of the site (cc.php). In this case we would need to decide if we want the chat page to use the same template as the site or a unique chat-only branded page. Again, this is currently out of scope for the KB implementation.

8.1.5 Home Page

The customer portal home page will offer consumers with the ability to search for answers in the knowledge base by keywords, browse for answers by topic (category/call type), view a dynamic list of most popular answers.

8.1.6 Search Widget

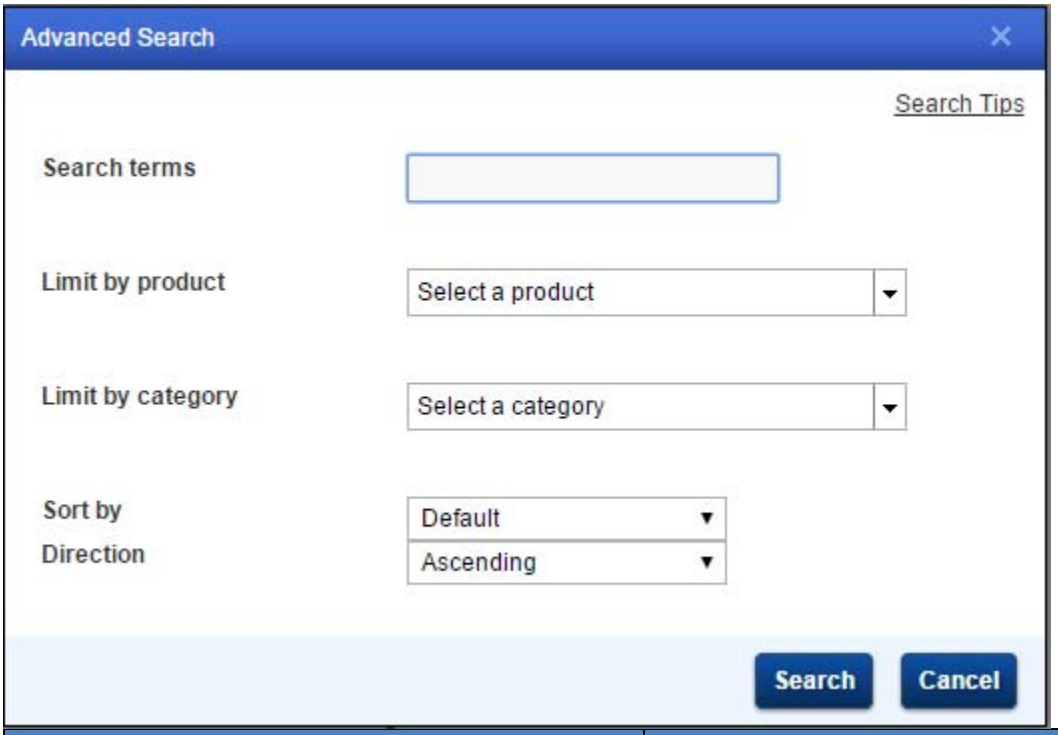
Consumers will be able to search for answers by utilizing the Search widget located at the top of the home page. This widget displays an input textbox that allows the user to search a report for a given keyword or phrase.



Label	Custom Label
Find the answer to your question	To be defined by Covered CA marketing

8.1.6.1 Advanced Search

Consumers will have the ability to leverage advanced search to further filter their search results by topic/category.
The image below is a sample of the advanced search window. Product filtering will be removed.

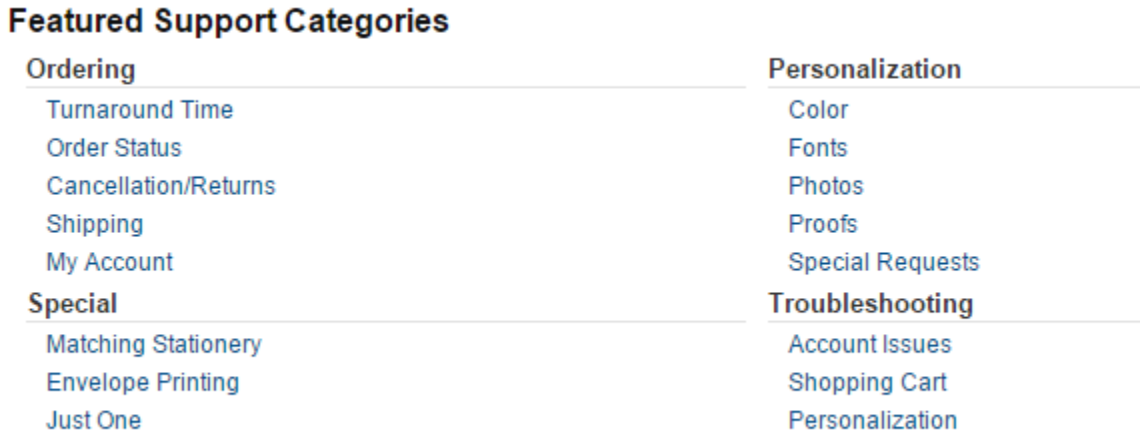


Label	Custom Label
Limit by category	To be defined by Covered CA marketing

8.1.7 FEATURED SUPPORT TOPICS (CATEGORIES/CALL TYPES) WIDGET

This widget displays hierarchical tree data for products and categories as an indented list of links. Consumers will be able to browse answers by their associated topics (categories/call types). Only topics that have end-user visibility enabled will appear in this list. Covered CA will determine and configure the Topic (Categories/Call Types) that should be visible to the public.

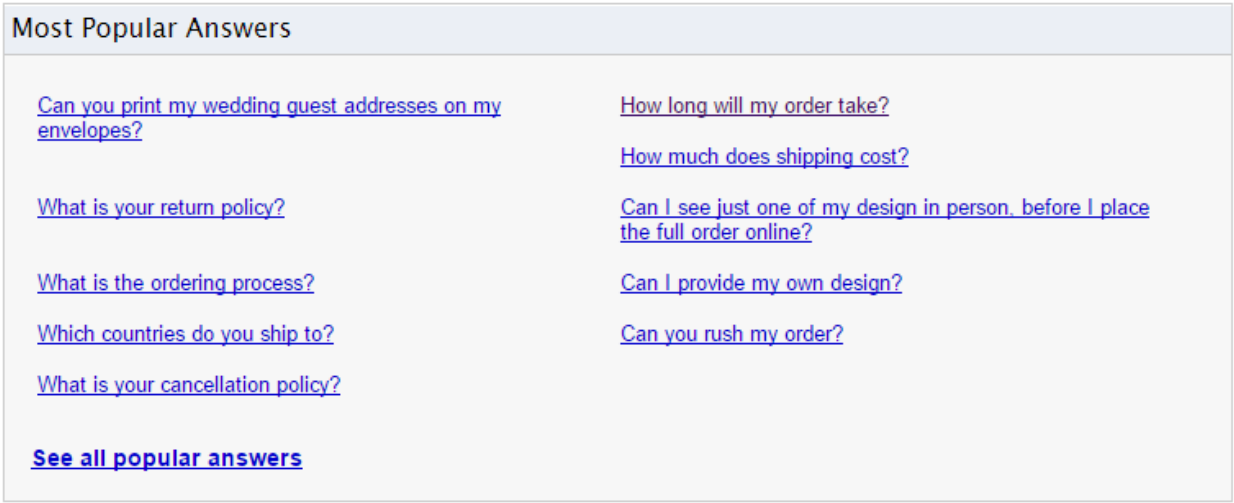
The image below is a sample of the of the Featured Support Topics widget and does not represent real data from Covered CA.



Label	Custom Label
Featured Support Categories	To be defined by Covered CA marketing

8.1.8 Most Popular Answers Widget

Consumers will be able to view a list of most popular answers. This is a dynamic list that is automatically updated and driven by consumer activity within the Knowledge Base. This list will only display the top 10 most viewed answers but this number can be increased or decreased at any time by a user with access to the Customer Portal development pages. The image below is a sample of the of the Most Popular Answers widget and does not represent real data from Covered CA.



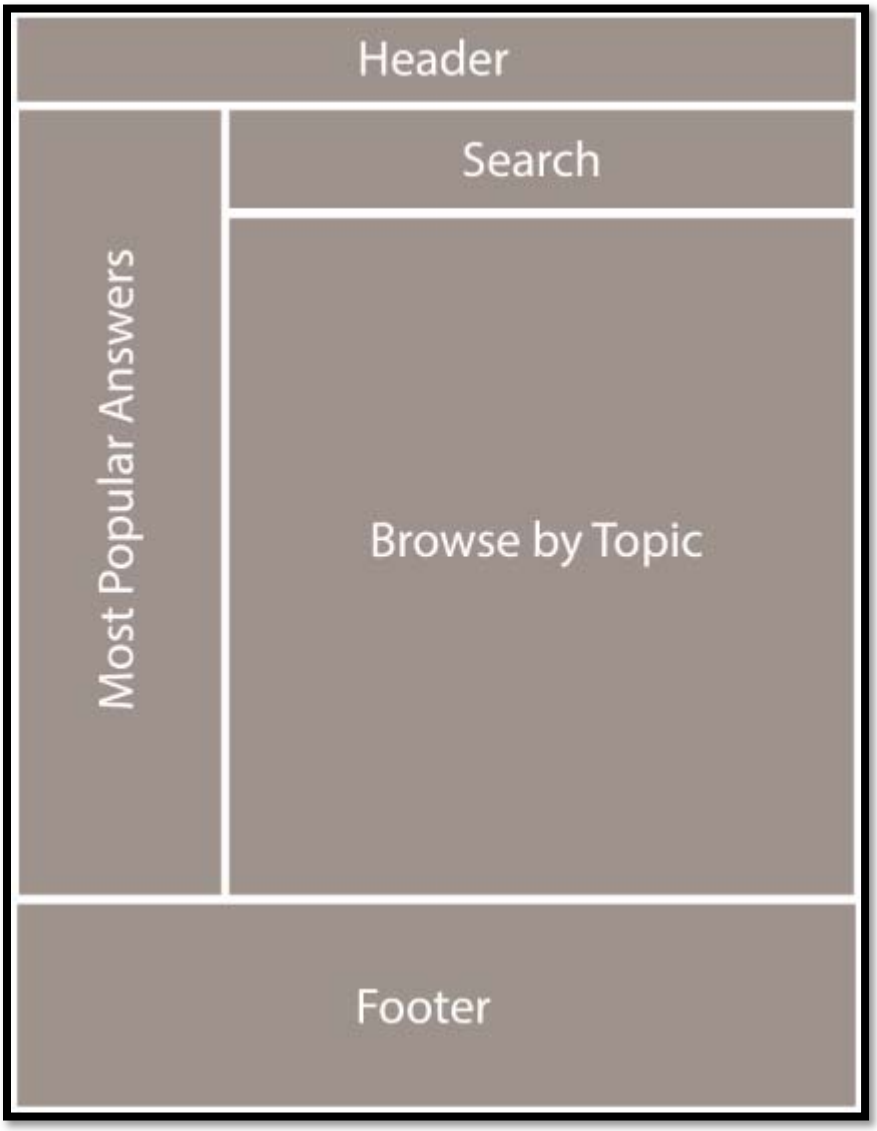
Label	Custom Label
Most Popular Answers	To be defined by Covered CA marketing

8.1.9 HOME PAGE LAYOUT

The home page of the customer portal contains all the widgets discussed above (Search Widget, Featured Support Categories Widget, and Most Popular Answer Widget). The widgets can be positioned in a way that best suits the needs of Covered CA.
Covered CA will need to choose from one of the following layout options:

8.1.9.1 OPTION1

8.1.9.2 OPTION 2



8.1.9.3 OPTION 3

8.2 ANSWER LIST PAGE

The answer list page displays the results of a consumer taking action on the home page. For example, if a consumer enters a keyword in the search widget and clicks “Search” then he will be taken to the Answer List page which will only display the answers that contain the search terms entered. Another example, if a consumer clicks on a featured support topic then he will be taken to the Answer List page with will only display the answers associated to the topic selected. The list will display the “Question” that is associated to the knowledge article as well as the first 200 characters of the “Answer.” Consumers will be able to click on

the “Question” to view the answer detail. No other article content will be displayed on this page (such as, updated or published date).
The image below is a sample of the Answer List page and does not represent real data from Covered CA.

Advanced Search

Search

Find the answer to your question

Results **1** - **10** of **62**

Can you print my wedding guest addresses on my envelopes?
Yes! For wedding stationery, we offer guest address imprinting for an additional charge. This service is not available online, but if you would like to request this service, simply mention it in...
Date Updated: 11/24/2014

How long will my order take?
Total turnaround time (production and shipping) will depend on the product you ordered and the shipping method you chose during checkout. Production Time Production typically takes 3–8 business days...
Date Updated: 10/03/2014

How much does shipping cost?
Shipping cost is based on UPS published rates and is determined by the package weight and your address. You will be able to estimate shipping and tax in your shopping cart prior to checking out.
Date Updated: 05/30/2014

What is your return policy?
100% Quality Guarantee We want you to be head over heels happy with your MagnetStreet products and that's why we stand behind a 100% quality guarantee on products, printing and services. If we've...
Date Updated: 09/19/2014

Can I see just one of my design in person, before I place the full order online?
Yes! Through our Just One ® program, you can order a fully personalized and printed sample of your design. (Up to 10 different designs can be ordered.) To order just one, select a...
Date Updated: 12/02/2014

What is the ordering process?
Proofing Most of the time, you can approve a digital proof of your design right from your cart. If you added a special design request, your proof will be emailed 2–3 days after checkout. Ordering...
Date Updated: 07/11/2014

Can I provide my own design?
Yes! You are more than welcome to use your own custom design on our products. To learn how to format your files, view our Graphic Standards . Each department has products available for custom design...
Date Updated: 11/06/2014

Which countries do you ship to?
At this time, we ship to the United States (Hawaii, Alaska, and the 48 contiguous states) and Canada . All customers are charged in U.S. dollars. U.S. orders are shipped either UPS or USPS. Canadian...
Date Updated: 09/25/2014

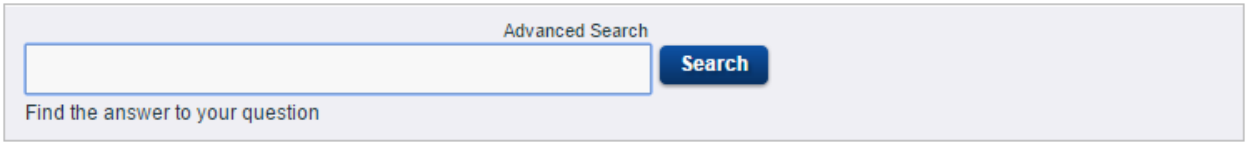
What is your cancellation policy?
We offer a no-fee cancellation on any order that has not gone into production yet, and has not been worked on by a MagnetStreet designer. If a designer has worked on your order, there is a $35...
Date Updated: 09/25/2014

Can you rush my order?
To maximize quality and fairness for all customers, we are unable to rush production on your order. However, we offer several expedited shipping options during checkout. You can also view a map of...
Date Updated: 09/25/2014

1 2 3 4 5 6 Next >

8.2.1 Search Widget

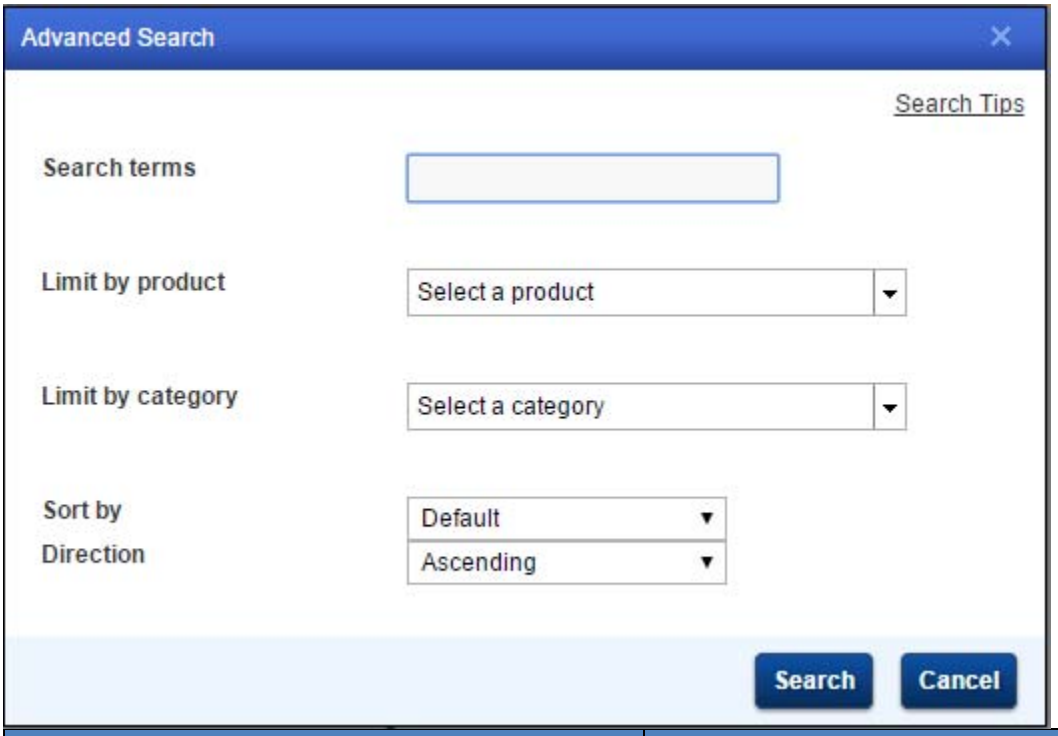
Consumers will be able to search for answers by utilizing the Search widget located at the top of the home page. This widget displays an input textbox that allows the user to search a report for a given keyword or phrase.



Label	Custom Label
Find the answer to your question	To be defined by Covered CA marketing

8.2.1.1 Advanced Search

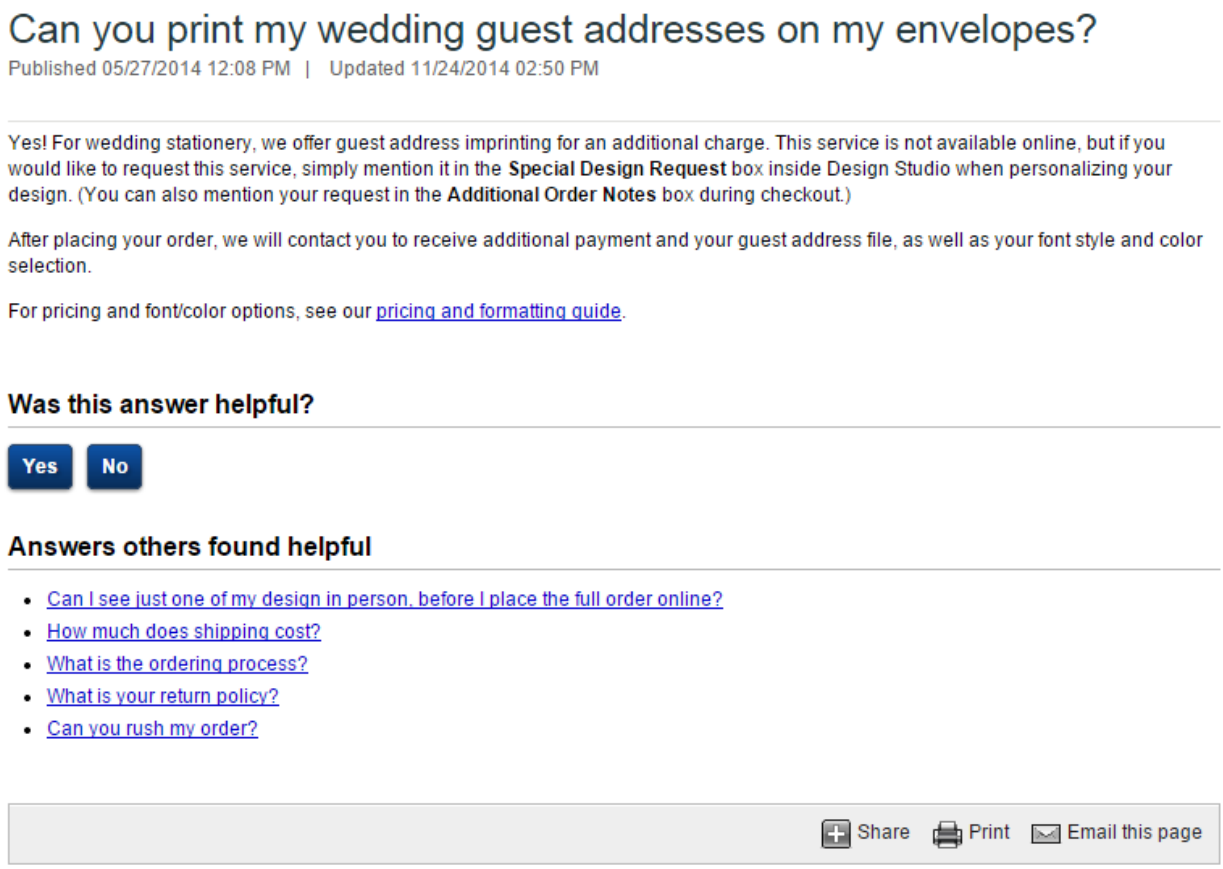
Consumers will have the ability to leverage advanced search to further filter their search results by topic/category.
The image below is a sample of the advanced search window. Product filtering will be removed.



Label	Custom Label
Limit by category	To be defined by Covered CA marketing

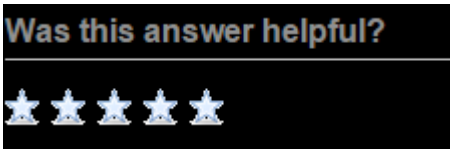
8.3 ANSWER DETAIL PAGE

The Answer Detail page displays the full details of the knowledge article including the Question, Answer, Date Published, Date Updated, and any additional content such as Attachments, Images, Rich Media, etc. associated to the knowledge article. It contains widgets that allow the consumer to provide feedback on the answer (rating system), view lists of automatically and manually related answers, and perform actions such as printing or sharing the article on various social media sites.
The image below is a sample of the Answer Detail page and does not represent real data from Covered CA.



8.3.1 FEEDBACK WIDGET

This widget displays the answer feedback control on the page. The consumer can choose a rating for the answer which impacts the overall score of the answer. The score helps determine the placement of the answer in the overall answer list as well as the Most Popular Answers Widget on the home page. Consumers will have the ability to rate each answer using a 5-star system. The default functionality of this widget is to create an incident when the consumer provides low-scoring feedback. This functionality will be disabled for phase 1.



8.3.2 Answers Others Found Helpful Widget

This widget displays a list of related answers for the answer ID indicated. Answers may be related manually while editing an answer from the Administration Console, or automatically related based on consumer interactions with the site. This widget will display a maximum of 5 related answers. This number can be increased or decreased at any time.
The image below is a sample of the Answers others found helpful Widget and does not represent real data from Covered CA.

Answers others found helpful

- What is the ordering process?
- Can you rush my order?
- How much does shipping cost?
- Which countries do you ship to?
- Can I see just one of my design in person, before I place the full order online?

8.3.3 Previously Viewed Answers Widget

This widget displays a list of answers that a customer has viewed in the current visit to Customer Portal. This widget will display a maximum of 5 previously viewed answers. This number can be increased or decreased at any time.
The image below is a sample of the Previously Viewed Answers Widget and does not represent real data from Covered CA.

Previously viewed answers

- Can you print my wedding guest addresses on my envelopes?

9 Custom Fields

The following is a list of custom fields that were defined during the design phase:

- Internal Only
  - Values: Yes or No
  - This field defines whether or not the document is for internal Service Center staff only, or if it will also be displayed via the Public Website
- Priority
  - Values: Outdated, Urgent, No Value
  - Default Value: No Value

- This field defines the Priority of the article (typically as the team initiates the annual review process, but can also be used for new content proposed). An article will be assigned the "Outdated" value when it has content that will expire or change within a specified timeframe. (For example, the penalty for not having health care coverage changes from one year to the next.) An article will be assigned the "Urgent" value when it has content that is related to a hot topic or an urgently needed article.

10 REPORTS

The following provides a list of reports that will be available:

- Scheduled Article Review (SAR) Report – Detailed requirements were discussed in one of the design sessions?
- Abandoned Search / Empty Search / Search Terms with No Results – What report can we use to identify search terms used by SCRs or the public that return no results? (Can the data be provided separately by Console vs. Public site?)
- Most / Least Frequently Accessed Content (Answers Utilized by Agents or other report) – What report can we use to identify articles viewed most frequently and least frequently during a specified period?
- Is there a report that allows us to analyze search(es) conducted on high-cost interactions (high call length or escalated calls)?
- Notification process when content is updated – Discussed creation of a Report that would be visible on every SCRs Nav Set "Updated Answers for the Last X Days". (SCRs would have to open and review the report. Need to validate with Service Center that this is something they are interested in.)
- Updated Articles / New Articles Report – Report that identifies the number (and list) of articles updated and/or created in the KB during a specified period (week, month) by user.

11 OTHER CUSTOMIZATIONS

The following is a list of 'customizations' that we discussed over the course of the design sessions. If this isn't the right place to capture them, I'm open to suggestions.

- Remove the "Questions" item from the article display (CSR view from the Console) since we are only using Summary and Resolution in our articles.
- Add "Date Last Updated – XX/XX/20XX" to the Details section of the article display. This item should be in addition to the article "Create Date."
- Remove the "View" option on the Search KB page. Articles linked to this "View" option do not display "related articles" or "sibling articles" or "manually related articles." Articles accessed by selecting the article name incorporate these links.

Open Design Questions:

- What are our options for tracking changes when an article/answer is updated? We need to maintain an audit trail for the Service Center.

- We need to better understand how to differentiate content that is “Public” vs. “Internal” so we don’t’ have to create duplicates of every article (conditional answers?)
- Need to talk more about Learned Links vs. Manually Related vs. Sibling Answers so the KB team understands how to set up articles for best search outcomes and ease of finding answers.
- Is there a process for archiving content? (The Service Center needs to know what specific answers were used during a specified period of time. Would we simply mark an article as Private? Is there a way to add ‘active’ date ranges for content?)

Questions for IT:

- Back-up and recovery process – can we get information on the schedule, back-up and recovery processes?
- Will SharePoint be available to all Service Center staff for accessing “master documents” (detailed Task Guides, Job Aids) that should not be stored in the KB? Based on KB best practices, the KB team is planning on providing answers/articles that are less than one page and would like to link to the associated Task Guides or Job Aids of the SCRs need to access them.

APPENDIX A – TAXONOMY

- This Answer - Any knowledge base information that provides solutions to common customer support questions.
- Answer Access Level - A method of controlling what information is visible to customers. The default answer access levels are Help and Everyone, and custom access levels can be added.
- Answer Relationship - The relationship between two or more related answers. Answer relationship types include sibling, manually related, and learned link. Sibling and manually related answer relationships are defined by staff members. Learned link answers are automatically defined through customer activity.
  - See Learned link, Manually related answer, and Sibling answer.
- Answer Status - A method of controlling the visibility of an answer. The default answer statuses are Public, Private, Proposed, and Review, and custom answer statuses can be added.
- Answer Status Type - The status of an answer that determines whether it can be viewed by customers. The default answer status types are Public and Private.
- Answers Page - A page on the customer portal where customers can view answers and search the knowledge base. Customers can view individual answers or search the knowledge base using selection criteria to narrow their search. If additional elements are enabled, customers can also search documents, websites, and communities.
  - See also Web Indexer and Oracle RightNow Social Experience communities.
- API - An interface that enables programmers to communicate with the Oracle database. The API includes functionality to create, update, delete, and retrieve answers, contacts, hierarchical menus, incidents, opportunities, organizations, quotes, SLA instances, staff accounts, and tasks.
- Conditional Section - A section of text in a document that appears only to those contacts meeting certain criteria. Conditional sections can also be placed in answers and tagged with specific answer access levels. In message templates, conditional sections can be used to filter content by contact, profile, runtime variable, or record type.
  - See Access level conditional section and Document.
- Everyone Access Level - An access level designed to allow answers to be visible to all customers depending on the answer status.
- File Attachment Answer - A type of answer that appears as a file attachment.
- HTML Editor - A WYSIWYG (what you see is what you get) editor for formatting and editing answers, mailings, campaigns, documents, questionnaires, and invitation messages in HTML without previous HTML experience.
- Knowledge Base - All information (such as answers, incidents, contacts, organizations, opportunities, products, staff accounts, tasks, mailings, and campaigns) maintained and presented by Oracle RightNow CX in a meaningful way. Knowledge base also refers to the interrelationships among the pieces of information.
- Learned Link - Related answers that have a learned relationship as a result of customer activity.
- Privileged Access Answers - Answers that are assigned a custom access level for viewing by certain contacts and organizations assigned to the appropriate service level agreement.

- See SLA.

- Product Linking - An option for linking products to categories and products to dispositions so that category and disposition choices are narrowed to only those associated with the selected product for staff members working with incidents and customers searching on the customer portal.
- Propose Answer - A function for proposing that an incident's solution be added to the answers available to customers. The proposed answer is reviewed by the knowledge engineer, who determines if it should be made public and, if so, its access level, status, language, and visibility.
- Proposed - One of the default answer statuses. This answer status indicates that the answer has been proposed by a staff member from an incident. Answers with a Proposed status are not visible to customers.
  - See Answer status.
- Public - One of the default answer statuses and status types. Answers marked Public may be visible to customers depending on their access level and language.
  - See Answer status and Answer status type.
- Question - The main element in a survey. Text, choice, and matrix question types can be created. Questions can be used in multiple surveys, mixing and matching as necessary.
  - See Choice question, Matrix question, and Text question.
- Related Answers - A feature that assists customers in finding answers to questions related to the current web visit. Related answers appear on the answer details page and are sorted by relatedness—those answers that appear at the top of the list are most related to the answer being viewed.
- Search Priority Word - A word that is associated with an answer or document. The associated answer or document will always be displayed to customers when the search priority word is included in their search text.
- Search Index - A matrix that includes a list of important words within a document and their document of origin, allowing efficient searching. In some cases, the matrix is a database table. In other instances, the matrix is a file stored on a hard drive. For a word or phrase to be searchable within an incident, answer, file attachment, or external document, it must first be indexed.
- Self Learning Knowledge Base - The automatic generation of self-service content based on customer interactions so that the most pertinent information is presented.
  - See also iKnow and Knowledge base.
- Sibling Answer - Related answers that share the same product or category. Sibling answers may also contain the same file attachments.
- SLA Instance - A customer's individual copy of an SLA. An SLA is a generic contract that has not been applied to a specific customer. An SLA instance is a copy of the generic SLA applied to a specific customer.
- Standardization - Standardization – This is a business process, determined by Covered California University team or the KB team and will represent the repeatable process that each answer will go through when being created or reviewed.
- Suggested Answers - The list of answers from the knowledge base that is returned when SmartAssistant is invoked, either by staff members working on incidents or engaged in chat sessions or through business rules that append answers to email questions and Ask a Question queries from customers.

- See also SmartAssistant.

- Word Stemming - A feature used in keyword indexing and text searching that finds the root of each word and stores the stemmed root instead of the whole word, thereby saving large amounts of space while making a search broader and more appropriate.

APPENDIX B – KB BEST PRACTICES

Knowledgebase

Getting Started: Covered California

Website Support Goals

- Measuring Success
  - Call Deflection/Reduce Operating Costs
  - End User Adoption
  - Ease of Use
  - **Customer Satisfaction**

- Important for HOW success is measured
  - maximizing the interaction vs call deflection

Internal KB Success

- Majority of answers will be self-serve, not a lot of answers created through "Ask A Question"
  - Success Measures: Questions Avoided Report
- Internal Adoption (volume of self service is increasing over time)
  - Success Measures: Page Turns, Session Data, SCR Verbal Feedback
- Single Source of Truth – Consistency of answers, increased visibility in to questions being asked
  - Success Measures: Answer Feedback, All Knowledgebase Reports

Internal Knowledgebase

1. Limit Access by IP range
   - Settings>common>SEC_VALID_ENDUSER_HOSTS
   - A bit more cumbersome to manage IP addresses (working from home etc)
2. Single Sign-On
   - Not in scope
   - Usually involves a 3rd party
   - Once set up, is simple and easy to use
3. SLAs and Access Levels
   - Involves the set up of conditional answers
   - All agents will need to create username and password
   - Can be used in combination with 1 & 2

External Knowledgebase

- Home Page
  - Who will be accessing?
    - SCR, Covered California Staff (licensed)
    - Covered California Staff (non-licensed staff)
    - Consumers
    - External Partners
  - Where will Customers come from?
    - Where is the support page link?
  - Who is responsible for creating those links?
  - Who is responsible for look and feel mockups?

Answer Page Overview

- Static vs Dynamic Language – language that leads to a list of FAQs
  - Online Support
  - Need Help?
  - Knowledge Help
  - Customer Service

Creating Effective Answers

- Simple, Action Oriented, Short (5 words or less in the subject)
- Create Shorter Answers that link to other answers
- Use stop words to skip common words from being indexed
- Keywords - Use sparingly
- Aliases - Handles industry jargon, common word variations (email, e-mail)
- Use Consistent Formatting
- Create/Use a pre-defined style guide for answers

Answer Content Strategies

- Start with 10-12 answers and take advantage of ongoing questions, internal conversations to capture real-world issues
  - Places to get started: Most important category/product, upcoming events, FAQ's
- Allow SCRs to propose answers – publish new answers every week (provide incentive to agents to submit?)
- As you search recently solved incidents, view session logs to see if customers searched or viewed answers before submitting incident
- Before creating a new answer, search for existing answers that may already cover your topic. You may be able to avoid duplication by updating an existing answer

Answer Visibility

- Answer Status: Private, proposed, public and review (can create additional statuses
- Products/Categories: can be 6 deep, these are core to the product, small changes impact everyone (note: less than 5% of customers will use dropdowns due to fatigue)
- Answer Access: Allows you to control visibility to different end user groups (agents vs customers vs business)
- Review: Use review to pull time sensitive info off your site on a specific day (this is run at night so the answer will be pulled the night of the day to be removed)
- Publish: Set up content in advance
- Display Position: determines the position of the new answer relative to other answers

Searching for Answers

- A little extra detail
  - Service Cloud search engine is internal (intranet/KB search only)
  - Most search engines use AND – Service Cloud uses OR and heavy weighting on words. You can change this in config settings: ANS_AND_SEARCH
  - Content is indexed in the following order
    - Products and Categories
    - Keywords
    - Summary
    - Question
    - Answer
    - File Attachments

Searching for Answers Cont'd

Setting	Impacts	Default Weight
SRCH_KEY_WEIGHT	Keywords	50
SRCH_PROD_WEIGHT	Product Words	50
SRCH_CAT_WEIGHT	Category Words	50
SRCH_SUBJ_WEIGHT	Summary/Subject/Title Words	45
SRCH_DESC_WEIGHT	Question Words	30
SRCH_BODY_WEIGHT	Answer Words	4
SRCH_ATTACH_WEIGHT	File Attachment Words	4

Answer Publishing Process

- Start with structure but allow for the people who use the KB to improve it as they use it
- To Do:
  - Define Approval Review Process: who is the final publisher? Manager, KB Admin, SME for technical accuracy
  - Define Agent Answer Creation Process:
    - Agent modifies incident, creates answer and selects propose
    - KB team reviews, edits and formats the proposed answer and publishes it for public view
  - Define review dates, roles, and KB team
    - Who develops content, how often are answers reviewed

KB Roles Defined

- KB Manager – reviews KB reports for success measurements, standardization
- Content Owner/SME – the subject matter expert, usually found across the organization in a specific department or business, authors new answers
- Technical/Grammar Review – the one previewing the answer for punctuation, spelling, grammar before publishing answer to public
- KB Admin – Initial point of contact for proposed incidents, aged out answers, setting reviews, maintain approvals and answer feedback

Content Ownership

- Determines who owns what
- Ownership can be determined based on categories etc
- Owners are responsible for ensuring that content is accurate

Content	Owner
Site Help	Web Master
Careers	HR
Business Process	Operations
Promotions	Marketing
Tips	SME's
Account Info	Accounting

Answer Feedback

- Letting the technology do the work and evolve your content based on demand and usage
- Define process for answer feedback (Set up rule to send low scoring answers for improvement as well as reports for managers and KB admin. Answer feedback is a link below answer that has a source of Answer Feedback)

Ongoing Success

- KB Tuning every 6 months
  - First time, outsource this for best practices
  - Ongoing, KB Manager owns
    - Identify most used search terms
    - Find/create answers to match search terms
    - Perform a search
    - Evaluate results
      - Are you getting results
      - Review reports (GAP, keyword, KB Performance Dashboard
      - Evaluate results for all answer types (file attachments, URLs, Web)
    - Repeat steps above

APPENDIX C – LARGER KB BUSINESS WORKFLOWS

Figure 11: SCR Propose Answer Workflow

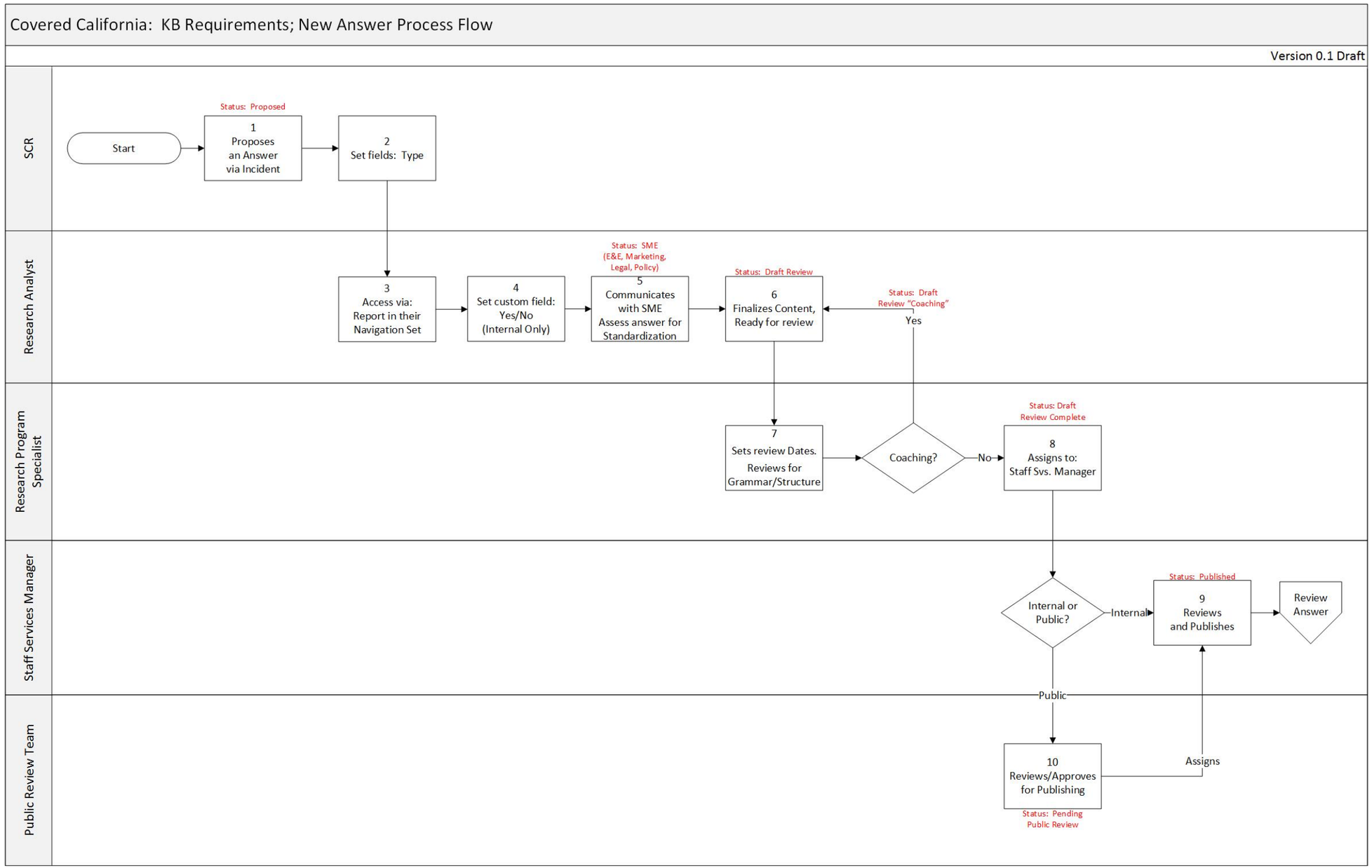


Figure 12: Content Management Team, Create New Answer

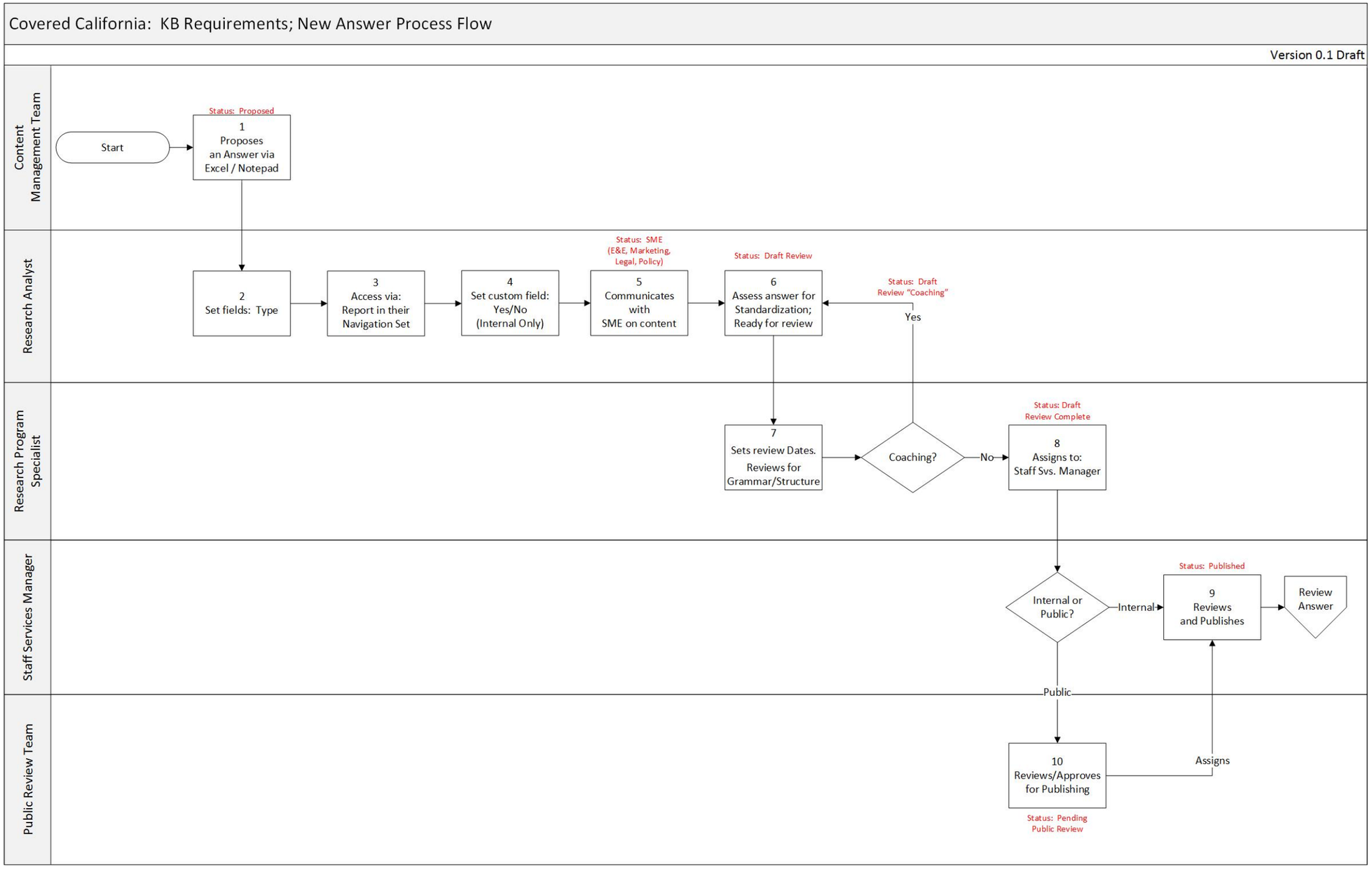


Figure 13: Review Answer Process Flow

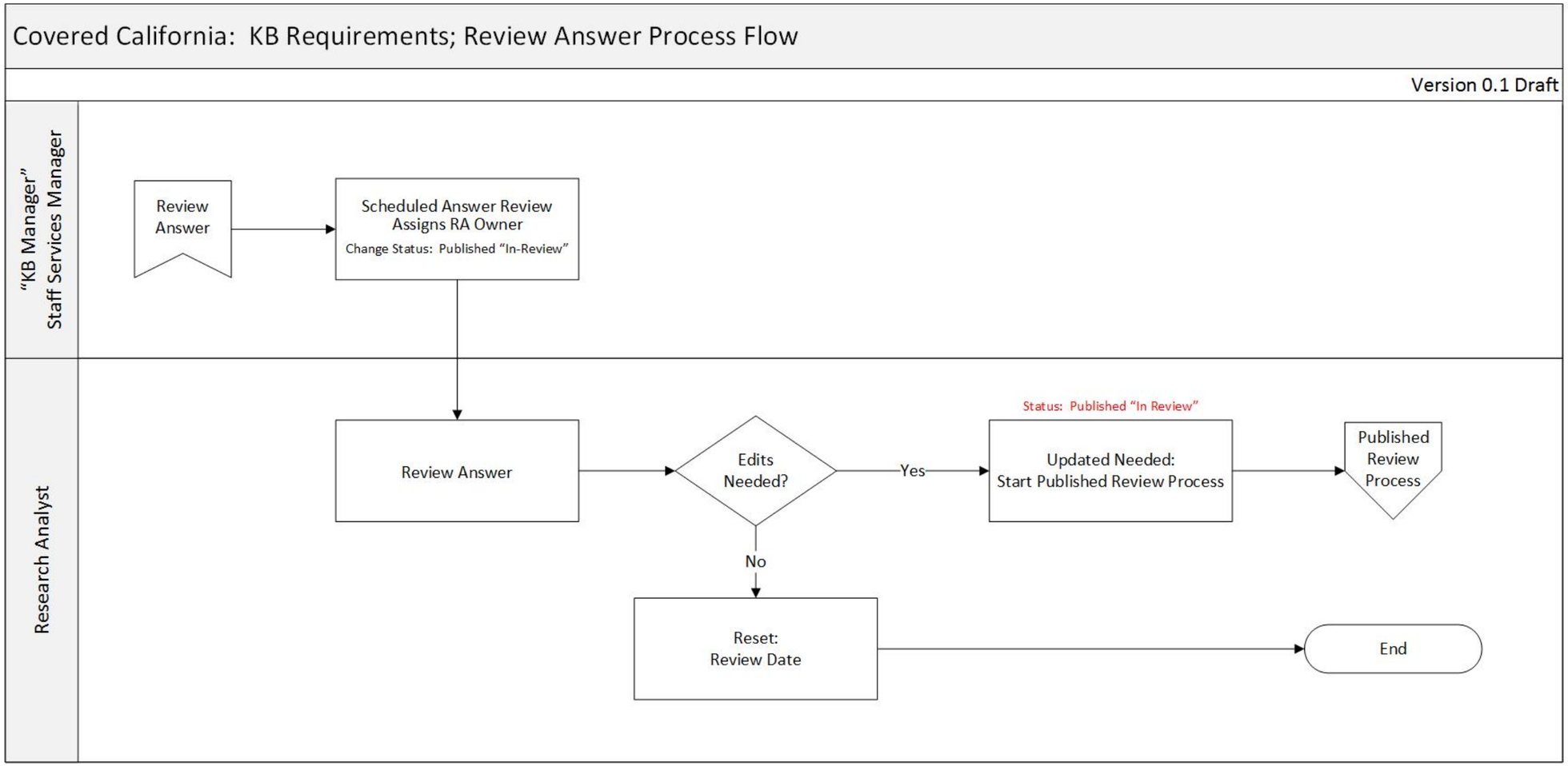
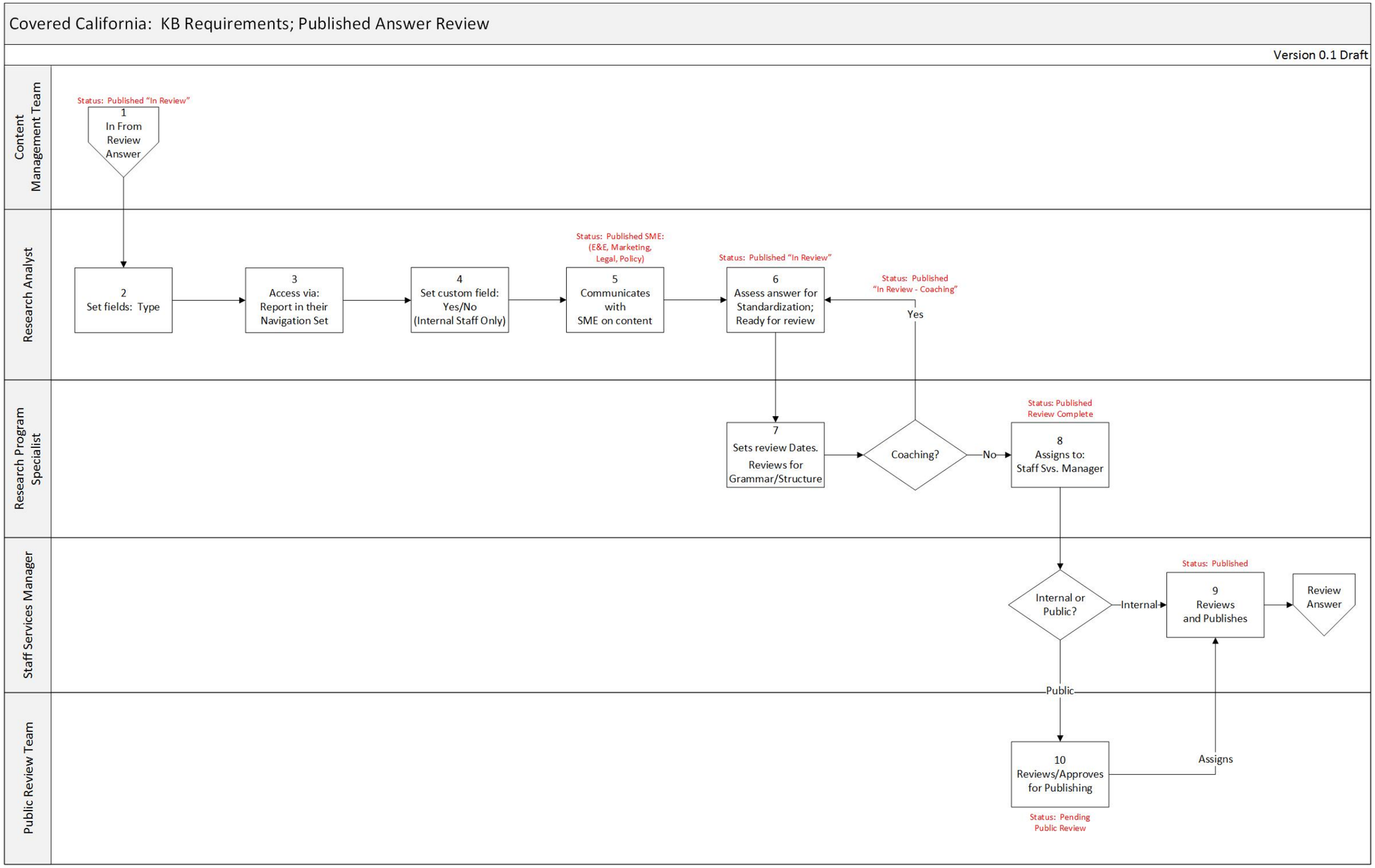


Figure 14: Published Answer Review



Covered California/CRM
External Affairs
Solution Design Documentation - Phase I

Version 1.3

VERSION CONTROL

[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]
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[redacted]	[redacted]	[redacted]	[redacted]

CONTENTS

1 OVERVIEW 4
1.1 Purpose 4
1.2 Intended Audience 4
1.3 Sign Off Approval 4
2 Foundational Workflow 5
2.1 Primary Use Cases 5
2.2 Profiles 8
2.3 Navigation Set 9
2.4 Staff Accounts 9
2.5 Workspaces 10
2.5.1 External Affairs Incident Workspace layouts 10
2.5.2 EA incident workspace rules 13
2.5.3 External Affairs Contact Workspace layouts 14
2.5.4 External Affairs Contact Rules 15
2.5.5 ExternalAffairsCont Workspace layouts 16
2.6 External Affairs Reports 17
3 Site-Wide Configuration 18
3.1 Configuration Settings 18
3.1.1 Queues 18
3.1.2 Post CRM upgrade Issues and Fixes 18
4 User Experiences 32
5 Design Issues 43

1 OVERVIEW

1.1 Purpose

1.2 Intended Audience

External Affairs Team and IT CRM Admin Team

1.3 Sign Off Approval

Drew Kyler _____

2 FOUNDATIONAL WORKFLOW

Consumer escalated Covered CA health insurance plan issues/complaints to their elected official, executive director or a high ranking official (refer to as Requestor). Upon receipt of the issues/complaints, the elected official, executive director or high ranking officer contacts/emails the External Affairs team (EA team) for resolution. Approximately 80% of these issues, will be forwarded to the External Coordination team for further investigation; 5% to Pinnacle (SHOP, a 3rd party Service Center team), and the remaining 15% will be referred to the qualified health plan provider (i.e. Kaiser or Blue Shield), Department of Health Care Services (DHCS), or Department of Manage Health Care (DMHC).

External Affairs

2.1 Primary Use Cases

- Upon receipt of the issues, External Affairs Analyst manually created an incident in CRM
    - External Affairs analyst login to CRM console
    - Click new incident from red Oracle button
    - Complete all required incident fields
    - Add constituent information to the incident (constituent tab)
    - Add requestor information to the incident (requestor tab)
        - For requestor contact information, set
            - Global opt-in -> NO
            - Outreach Opt-in -> NO
    - Save new incident

  Note: Requestor and constituent contact records are separate entries in CRM. The "ExternalAffairsCont" custom object allows the EA analysts to create many-to-many relationship between requestors and incidents (i.e. one requestor can have many incidents). The CO$ExternalAffairs table links the requestor to an incident opened for a specific constituent.

- External Affairs analyst researches issue and forwards incident to appropriate area for further investigation/resolution, if needed.
    - External Coordination
    - Department of Health Care Service (DHCS)
    - Department of Managed Health Care (DMHC)
    - Qualified Health Plan (QHP)

- External Coordination team researches and resolved the issues and sends the resolution back to External Affairs analyst.

- External Affairs analyst forwards the resolution to the requestors and closed the incidents.

Groups	Actions

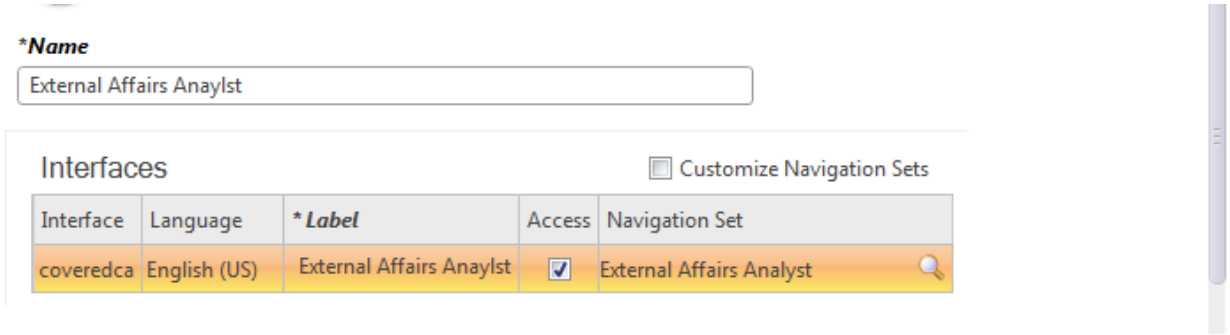
External Coordination
 	
Has CRM access
	• EA analyst determines that incident needs to be forwarded to External Coordination for resolution
	• EA analyst sets Issue Referred to –> External Coordination and save incident
	CRM workspace rules set:
	  • Queue -> EC-EA
	  • Date Escalated to -> now
	• EC analyst sees and opens incident sent to EC-EA queue by External Affairs
	CRM workspace rules set:
	  • EA Status of Issue -> In progress
	  (Status change provides EA analysts visibility that EC is working on the issue)
	• EC analyst resolves incident and transfer incident back to EA by setting:
	  • Status -> solved by EC for EA
	CRM workspace rules set:
	  • Date Resolved by EC -> now
	• EA analyst receives incident back from EC, determines resolution and email elected official with resolution and set EA status of issue -> completed
	CRM workspace rule set:
	  • Status -> closed

Department of Health Care Service (DHCS)
 	
No CRM access
	• EA analyst emails or calls the QHP for resolution. Updates private notes in incident while determining resolution
	
	• EA determines resolution and updates incident and emails Contact with resolution and closes incident
	CRM workspace rules set:
	  • Issue Referred Date -> now
	  • EA Status of issue -> completed
	  • Status -> closed

Groups	Actions
Department of Managed Health Care (DMHC) No CRM access	• EA analyst emails or calls the QHP for resolution. Updates private notes in incident while determining resolution • EA determines resolution and updates incident and emails Contact with resolution and closes incident CRM workspace rules set: • Issue Referred Date -> now • EA Status of issue -> completed • Status -> closed
Qualified Health Plan (QHP) No CRM access	• EA analyst emails or calls the QHP for resolution. Updates private notes in incident while determining resolution • EA determines resolution and updates incident and emails Contact with resolution and closes incident CRM workspace rules set: • Issue Referred Date -> now • EA Status of issue -> completed • Status -> closed

2.2 Profiles

External Affairs team has one profile named External Affairs Analyst.



Editor	Workspaces/Workflow
Answer	Non-KB WS R2.5
Appeal	Appeal WF
CTI	CTI Detail Initial WF R2.5
Chat	Chat – Left Transcript SCR R2.5
Contact	EA contact WS
Contact Multi-Edit	General Contact Multi-Edit WS R2.5
Enrollment Period	Enrollment Period WS R2.5
Incident	External Affars Incident
ExtenralAffairsCont	ExternalAffairsCont
Incident Multi-Edit	General SCR Incident Multi Edit WS R2.5
LanguageRelationship	Language Relationship
Opportunity	General Opportunity WS R2.5 360
Opportunity Multi-Edit	Opportunity Multi-Edit R2.5 Admin
Organization	Organization 2.5
Zip Code	CC_Zip codes

2.3 Navigation Set

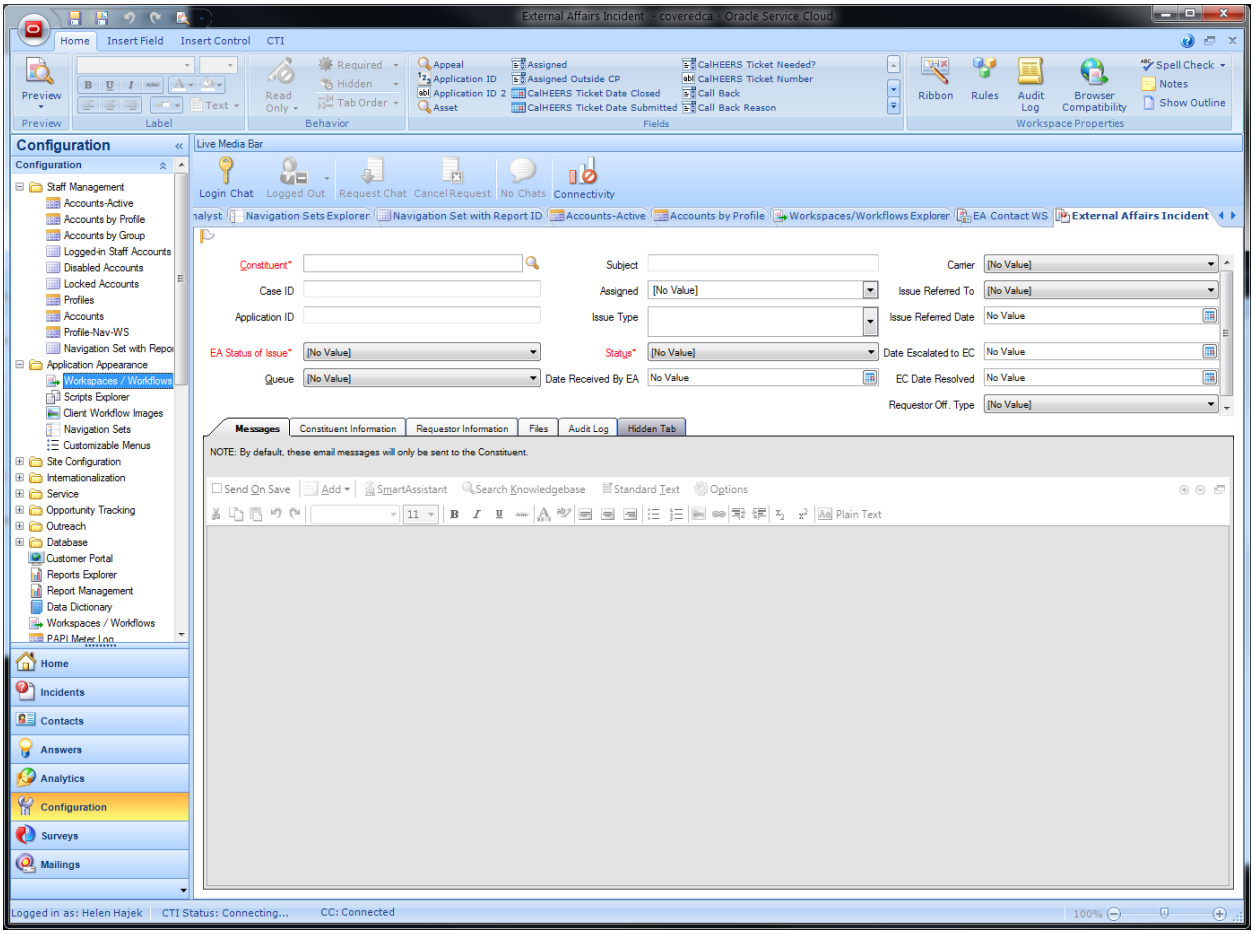
Location	Report ID	Report Name	Report Folder
Navigation Set: External Affairs Analyst: (DEFAULT) (15 items)			
Analytics	101744	1095 report	/Public Reports/Global
Analytics	101750	EA incidents by Calltype	/Public Reports/External Affairs/Nav Set Reports
Analytics	101751	EA incidents Referred To	/Public Reports/External Affairs/Nav Set Reports
Analytics	106974	EA Incidetns by Requestor Type	/Public Reports/External Affairs/Nav Set Reports
Analytics	106980	Incidents by Status	/Public Reports/External Affairs/Nav Set Reports
Contacts	106981	EA Contact Quick Search	/Public Reports/External Affairs/Nav Set Reports
Home	100292	.My Incidents 2.0	/Public Reports/.CalHEERS (Current Release)/.Common/Home Reports
Home	107078	EA Constituent Status of Incidents	/Public Reports/External Affairs/Nav Set Reports
Home	101457	EA Number of incidents by type	/Public Reports/External Affairs/Nav Set Reports
Home	107084	EA Requestor Opt-in Report	/Public Reports/External Affairs/Nav Set Reports
Home	106979	EA Status of Incidents	/Public Reports/External Affairs/Nav Set Reports
Home	101912	Incident IssueType by count	/Public Reports/External Affairs/Nav Set Reports
Incidents	107022	EA Incident Search	/Public Reports/External Affairs/Nav Set Reports
Quick Search	106981	EA Contact Quick Search	/Public Reports/External Affairs/Nav Set Reports
Quick Search	107022	EA Incident Search	/Public Reports/External Affairs/Nav Set Reports

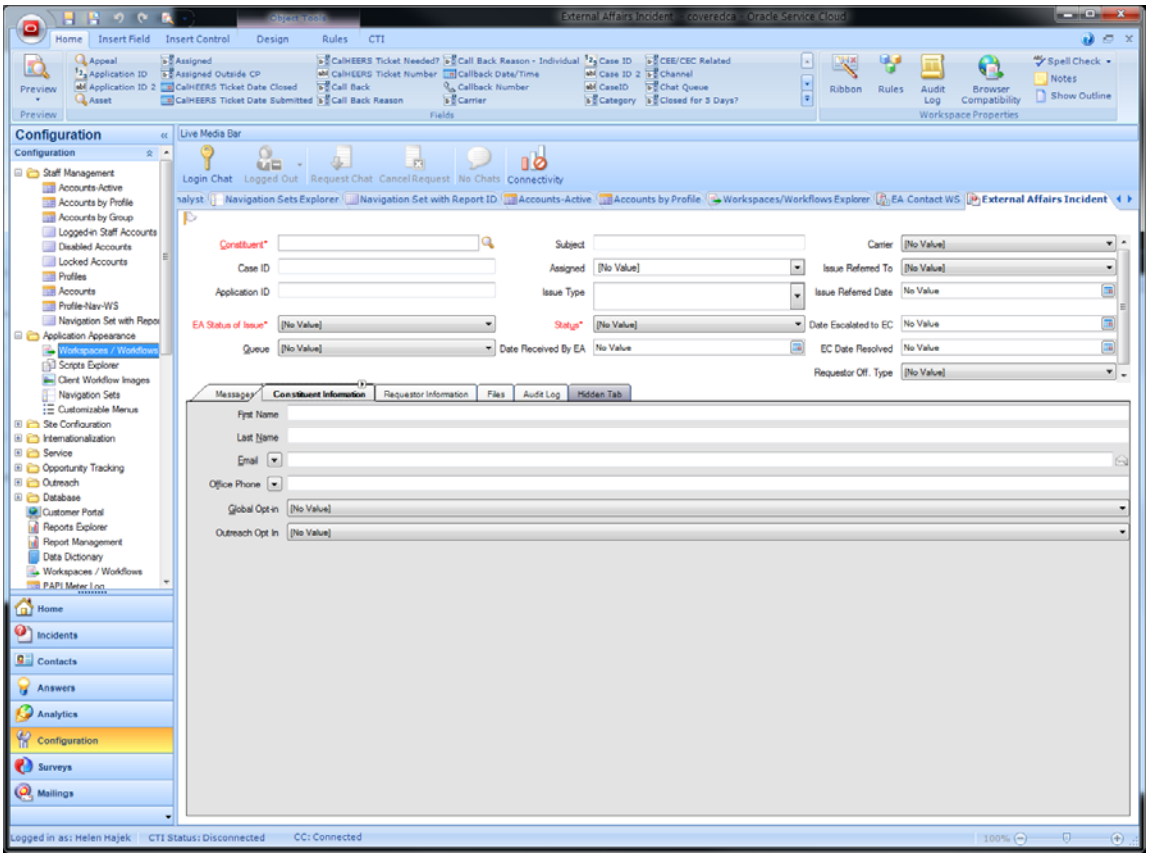
2.4 Staff Accounts

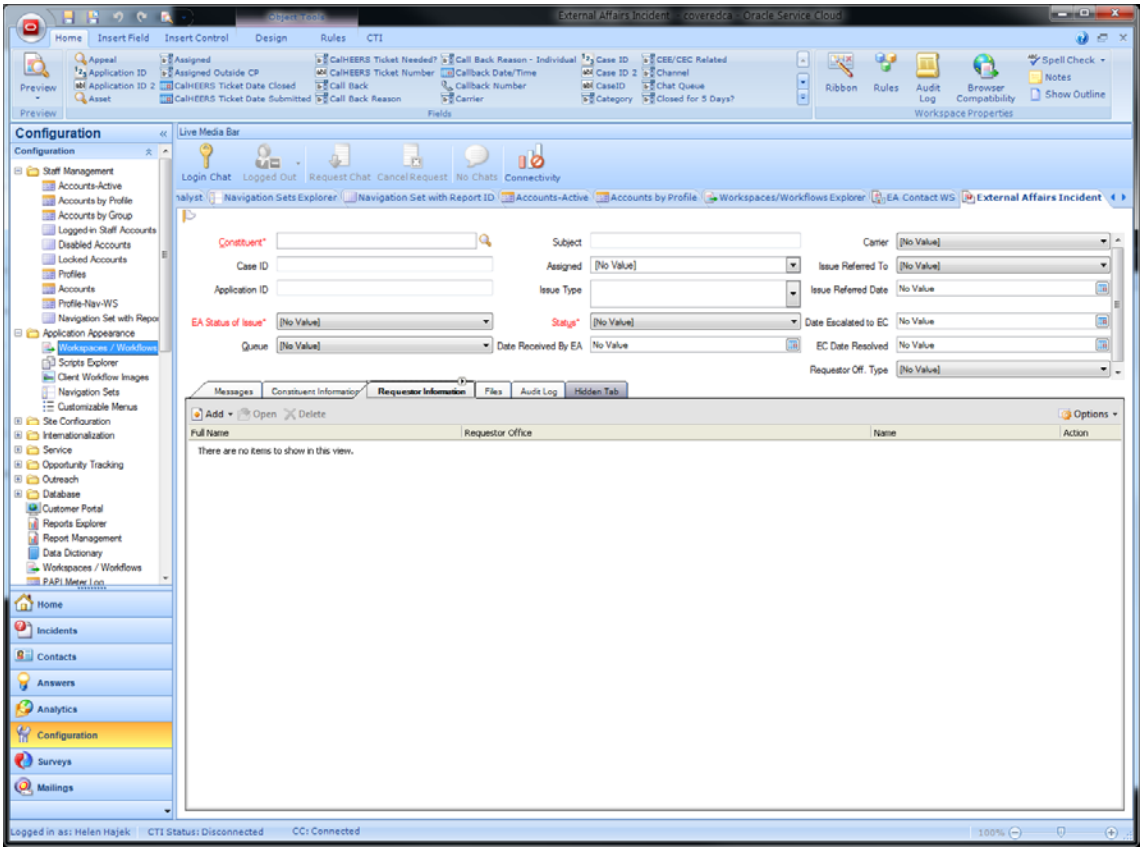
Name	Profile
[redacted]	[redacted]

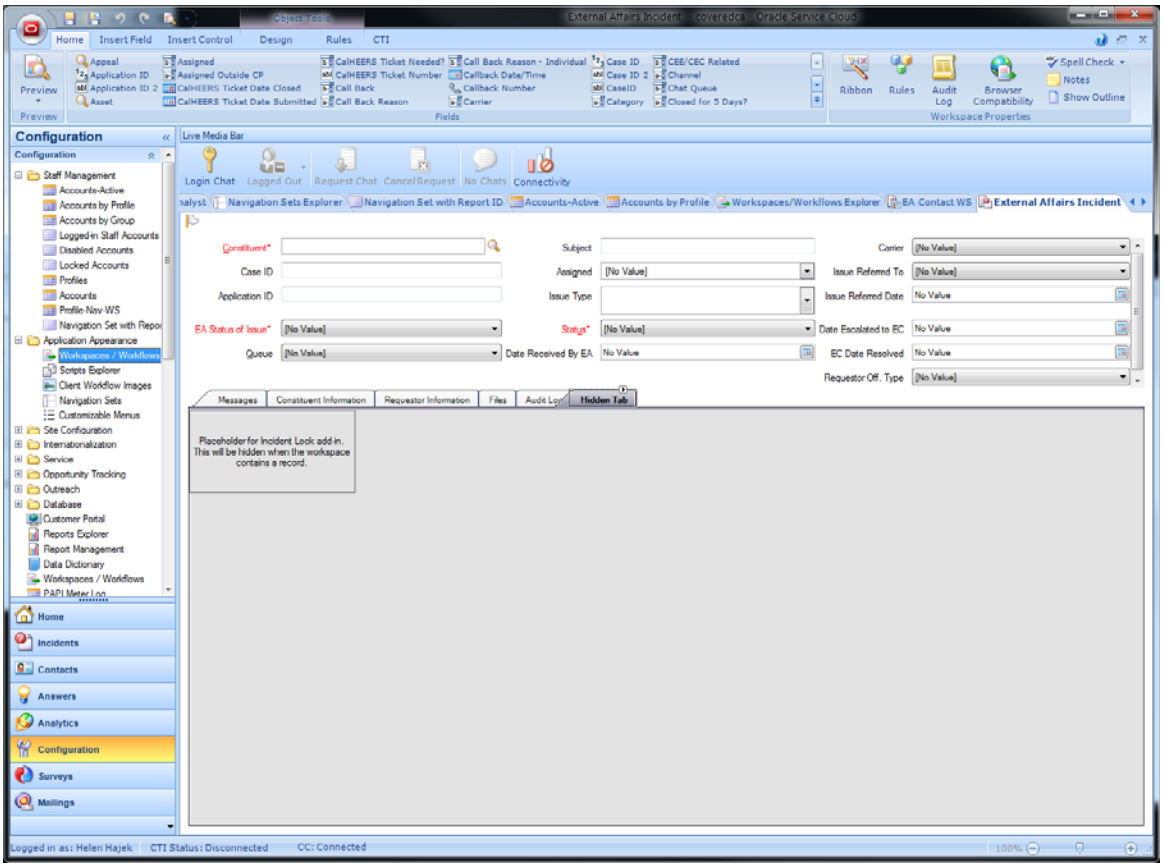
2.5 Workspaces

2.5.1 External Affairs Incident Workspace layouts




Configuration
Live Media Bar
Login Chat
Logged Out
Request Chat
Cancel Request
No Chats
Connectivity
External Affairs Incident
Constituent*
Subject
Carrier
Case ID
Assigned
Issue Referred To
Application ID
Issue Type
Issue Referred Date
EA Status of Issue*
Status*
Date Escalated to EC
Queue
Date Received By EA
EC Date Resolved
Requestor Off. Type
Message
Constituent Information
Requestor Information
Files
Audit Log
Hidden Tab
First Name
Last Name
Email
Office Phone
Global Opt-in
Outreach Opt In
Home
Incidents
Contacts
Answers
Analytics
Configuration
Surveys
Mailings

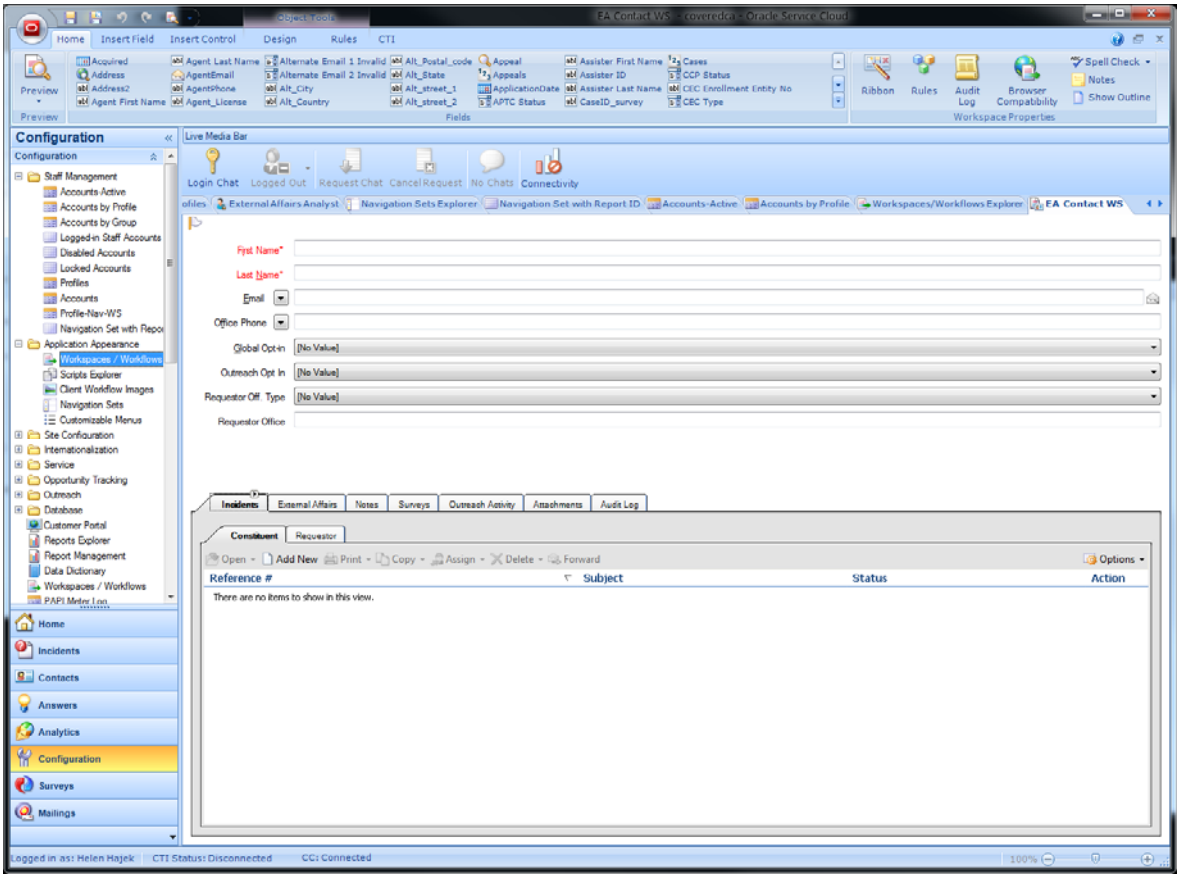

Configuration
Live Media Bar
External Affairs Incident
Constituent*
Subject
Carrier
Case ID
Assigned
Issue Referred To
Application ID
Issue Type
Issue Referred Date
EA Status of Issue*
Status*
Date Escalated to EC
Queue
Date Received By EA
EC Date Resolved
Requestor Off. Type
Messages
Requestor Information
Files
Audit Log
Hidden Tab
Add
Open
Delete
Options
Full Name
Requestor Office
Name
Action
There are no items to show in this view.


Home
Insert Field
Insert Control
Design
Rules
CTI
Preview
Appeal
Application ID
Application ID 2
Asset
Assigned
Assigned Outside CP
CalHEERS Ticket Date Closed
CalHEERS Ticket Date Submitted
CalHEERS Ticket Needed?
CalHEERS Ticket Number
Call Back
Call Back Reason
Call Back Reason - Individual
Callback Date/Time
Callback Number
Carrier
Case ID
Case ID 2
CaseID
Category
CEE/CEC Related
Channel
Chat Queue
Closed for 5 Days?
Fields
Ribbon
Rules
Audit Log
Browser Compatibility
Spell Check
Notes
Show Outline
Workspace Properties
Configuration
Staff Management
Accounts-Active
Accounts by Profile
Accounts by Group
Logged-in Staff Accounts
Disabled Accounts
Locked Accounts
Profiles
Accounts
Profile-Nav-WS
Application Appearance
Workspaces / Workflows
Scripts Explorer
Client Workflow Images
Navigation Sets
Customizable Menus
Site Configuration
Internationalization
Service
Opportunity Tracking
Outreach
Database
Customer Portal
Reports Explorer
Report Management
Data Dictionary
Home
Incidents
Contacts
Answers
Analytics
Configuration
Surveys
Mailings
Live Media Bar
Login Chat
Logged Out
Request Chat
Cancel Request
No Chats
Connectivity
Navigation Sets Explorer
Navigation Set with Report ID
Accounts-Active
Accounts by Profile
Workspaces/Workflows Explorer
EA Contact WS
External Affairs Incident
Constituent*
Case ID
Application ID
EA Status of Issue*
Queue
Subject
Assigned
Issue Type
Status*
Date Received By EA
Carrier
Issue Referred To
Issue Referred Date
Date Escalated to EC
EC Date Resolved
Requestor Off. Type
[No Value]
No Value
Messages
Constituent Information
Requestor Information
Files
Hidden Tab
Placeholder for Incident Lock add in. This will be hidden when the workspace contains a record.
Logged in as: Helen Hajek
CTI Status: Disconnected
CC: Connected

2.5.2 EA incident workspace rules

Active	Name	When	If	Then	Else
☑	Read-Only	CLOSED_INCIDENT named event fires		Make the editor read only AND Hide [Unknown Button] ribbon button	
☑	Status	The editor loads		Set EA Status of Issue to exclude No Value menu items	
☑	Set Assigned field	The editor loads		Set Assigned to include No Value, Logged in account, External Affairs - HQ, External Coordination - Rancho Cordova menu items	
☑	Sets queues	The editor loads		Set Queue to include External Affairs, EC-EA menu items	
☑	Hide Call Types	The editor loads		Set Category to exclude Agent, Eligibility, General Information, LMS, Misrouted Call/Transferred To, SHOP Phone, System Issues, CEC Assist, Application Assistance, Financial Management, COBRA menu items	
☑	Set Global and outreach opt-in to No	The editor loads	The logged in account's profile equals External Affairs Analyst	Set Global Opt-in to No AND Set Outreach Opt In to No	
☑	Set EA Queue	The editor loads	A new record is being created AND The logged in account's profile equals External Affairs Analyst	Set Queue to External Affairs AND Set EA Status of Issue to Open	
☑	Referral Date	Issue Referred To changes	Issue Referred To in list DHCS, DMHC, Carrier	Set Issue Referred Date to the time of the action plus 0 minute(s)	Set Issue Referred Date to No Value
☑	Date escalated to EC	Issue Referred To changes	Issue Referred To equals External Coordination	Set Date Escalated to EC to the time of the action plus 0 minute(s)	Set Date Escalated to EC to No Value
☑	Referral	Issue Referred To changes	Issue Referred To in list DHCS, DMHC, Carrier	Set EA Status of Issue to Completed AND Set Status to Closed	Set EA Status of Issue to Open AND Set Status to Open
☑	Incident Status	EA Status of Issue changes	EA Status of Issue equals Completed	Set Status to Closed	Set Status to Open
☑	Referred to Call Center	Issue Referred To changes	Issue Referred To equals External Coordination	Set Queue to EC-EA AND Set Assigned to No Value	Set Queue to External Affairs AND Set Assigned to Logged in account

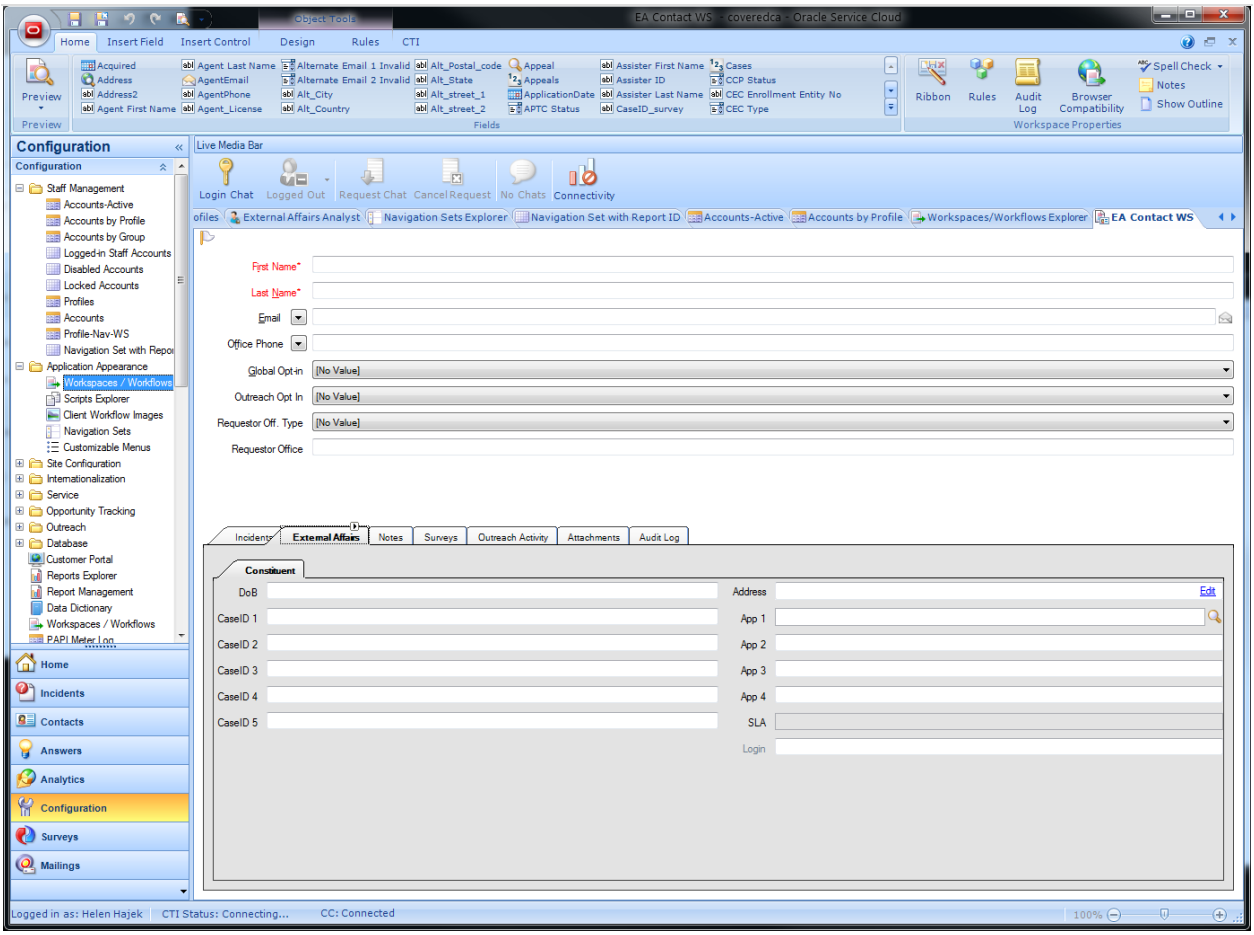
2.5.3 External Affairs Contact Workspace layouts



If the contact is a requestor – incidents associated with that requestor will be listed in the incidents/requestor sub-tab

If the contact is a constituent – incidents associated with that constituent will be listed in the incidents/constituent sub-tab.

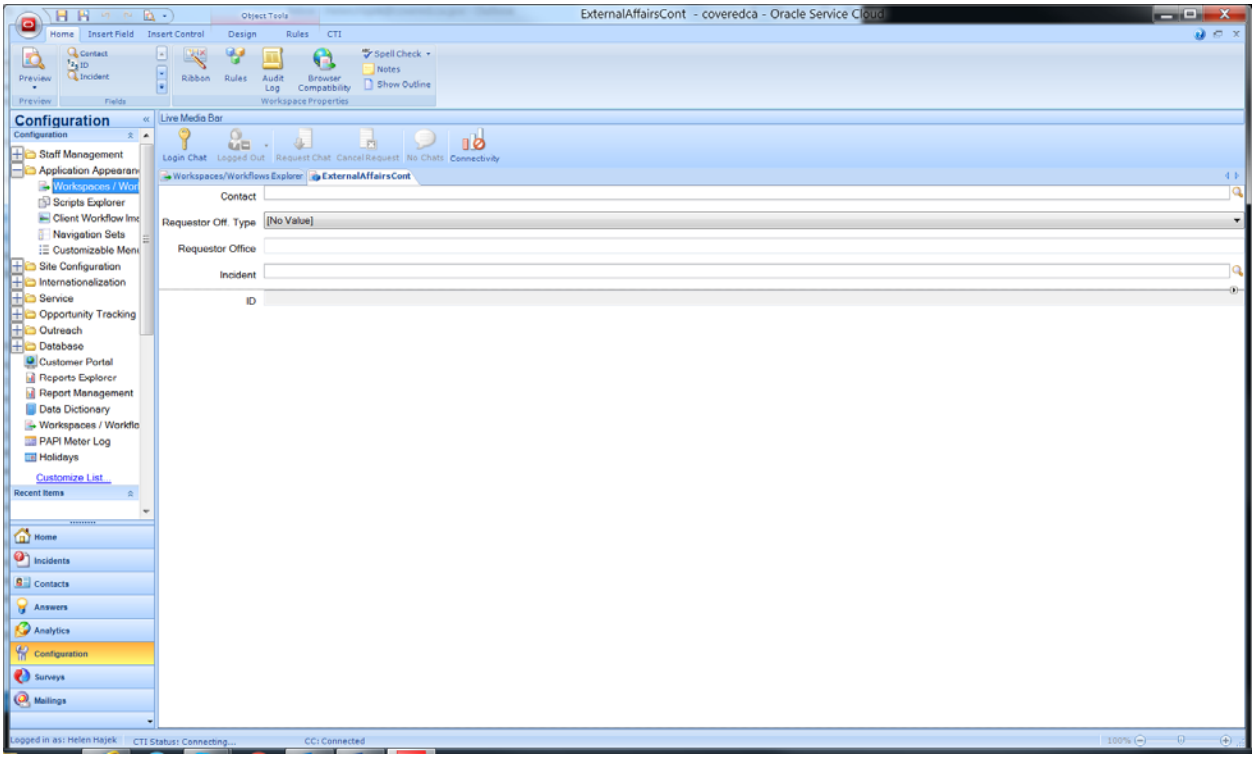
Additional constituent information can be found in External Affairs/constituent sub-tab.



2.5.4 External Affairs Contact Rules

Active	Name	When	If	Then	Else
☑	EA - Opt in equal No	The editor loads	A new record is being created AND The logged in account's profile equals External Affairs Analyst	Set Global Opt-in to No AND Set Outreach Opt In to No	

2.5.5 ExternalAffairsCont Workspace layouts



2.6 External Affairs Reports

CRM Report Name	CRM Report ID
Navigation Sets	
EA Constituent Status of Incidents	107078
EA incidents by Calltype	101750
EA Incidents by Requestor Type	106974
EA incidents Referred To	101751
EA Number of incidents by type	101457
EA Requestor Opt-in Report	107084
EA Status of Incidents	106979
Incident Issue Type by count	101912
Incidents by Status	106980
Search Reports	
EA Contact Quick Search	106981
EA Incident Search	107022
Workspace Reports	
EA Incidents by Contact	107028
EA Incidents by Requestor	107029
Contact Search - EA Requestor	106947
ExternalAffairsCont by Incident_EA	106944

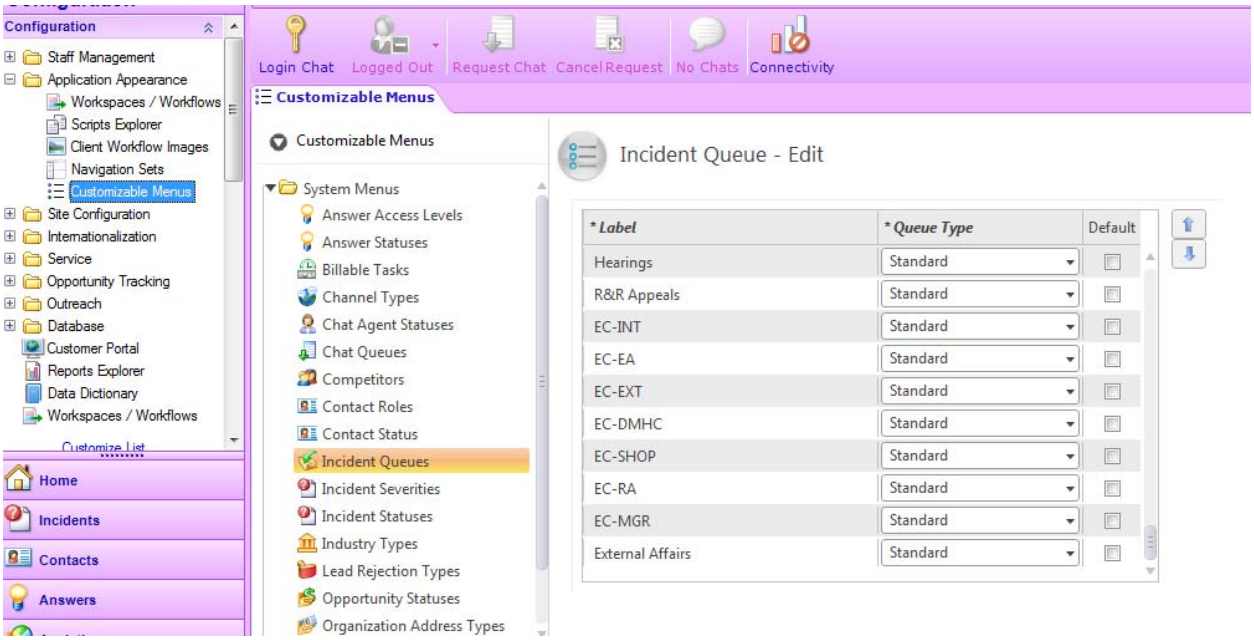
3 SITE-WIDE CONFIGURATION

3.1 Configuration Settings

3.1.1 Queues

External Affairs (Queue for the External Affairs team)

EC-EA (Queue used to transfer incidents between External Coordination and External Affairs)



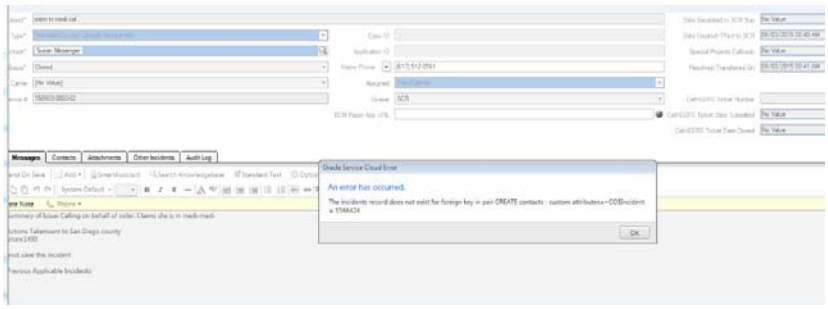
3.1.2 Post CRM upgrade Issues and Fixes

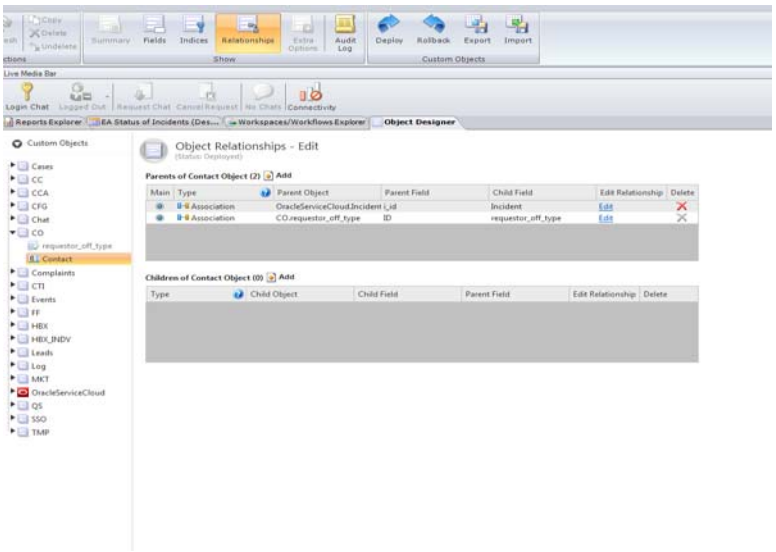
An issue with the existing requestor and incident relationship was found after CRM was upgrade from Feb 2013 to Feb 2015. IT helpdesk ticket 13223- Unable to save incident CRM (CO$incident issue)

- Staff trying to create a new contact after creating an incident will encounter these errors.
- Workaround was created for this issue - SCRs search for the contact prior to creating an incident, if a customer needs to be created they should be created, saved and a new incident should be created.

Background

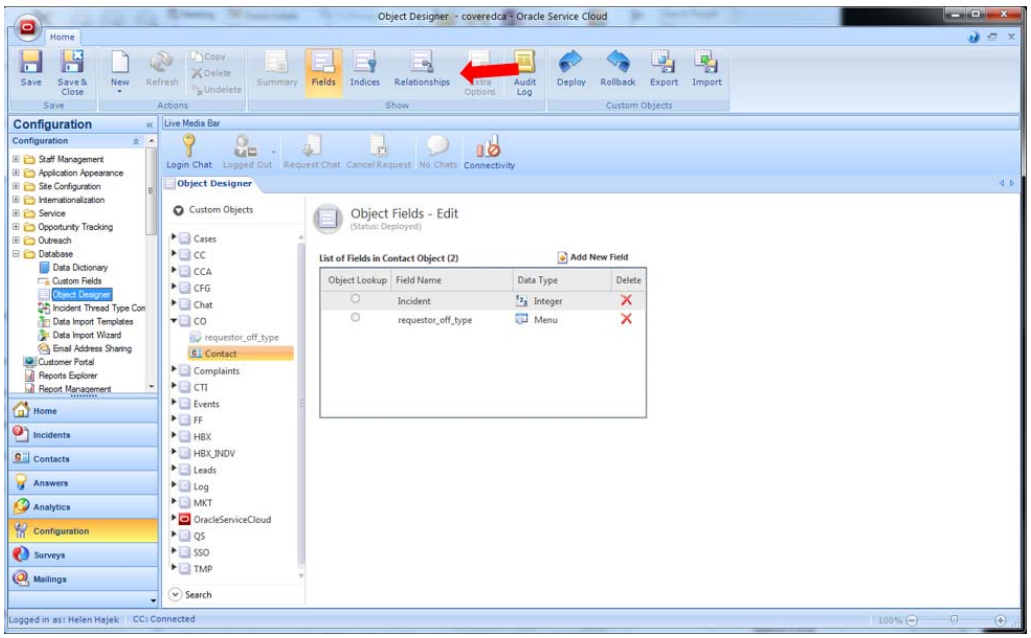
- The CO$incident attribute was created April 2015 to prevent the requestor being cc on any email communications between External Coordination and the consumer. Further research completed after the upgrade, confirmed the original incident attribute was not set up correctly. The attribute only can have one-to-one relationship instead of many to many relationship. A contact can only have one incident attached to it. When a new incident was add to the contact, the system removes the relationship from the prior incident and added it the new incident. A new custom object has to be created that allow many-to-many relationships.



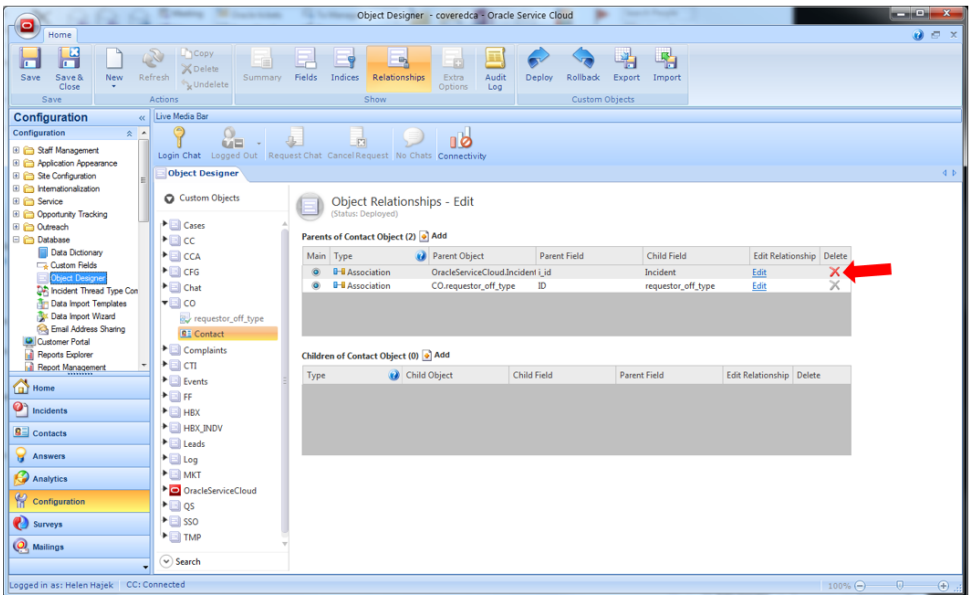


The CO$incident attribute was removed and the CO$ExternalAffaisCont custom object was added on 10/23/2015

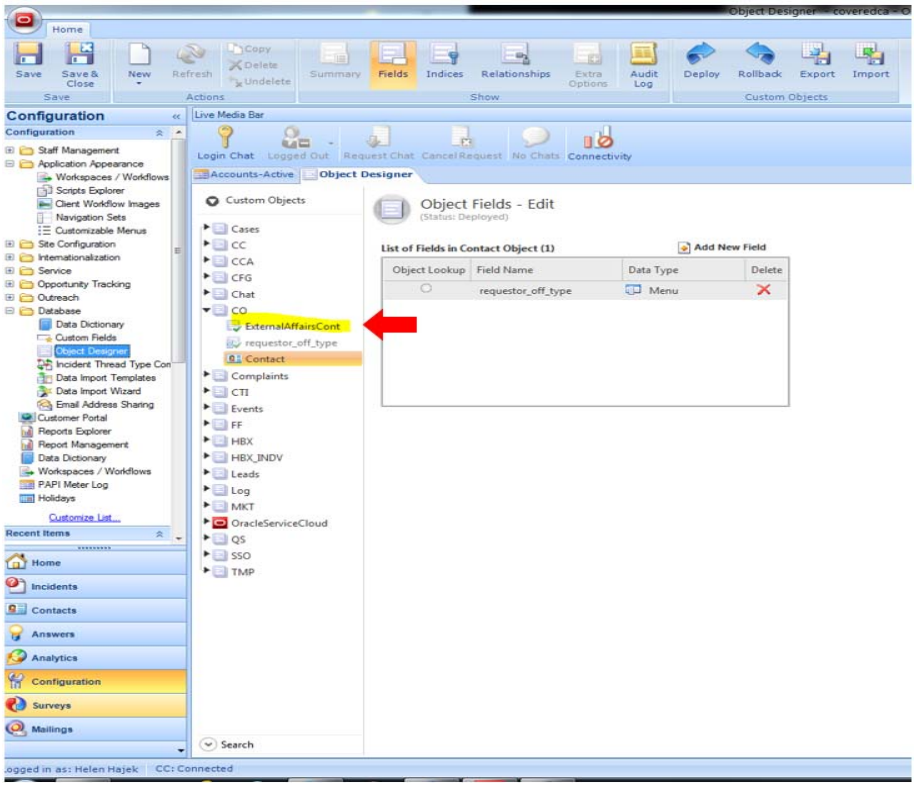
1) Remove incident attribute from custom object/contact.
    a. Click database/object designer/CO/contact
    b. Click relationship from ribbon



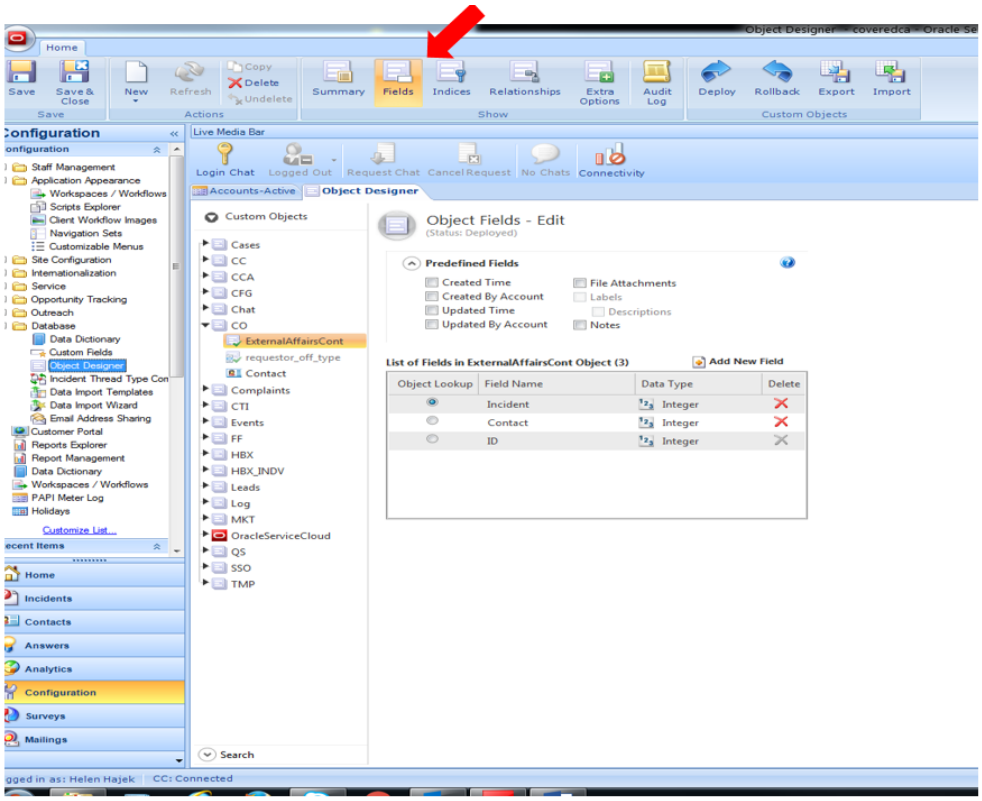
2) Click delete
   a. Save and deploy

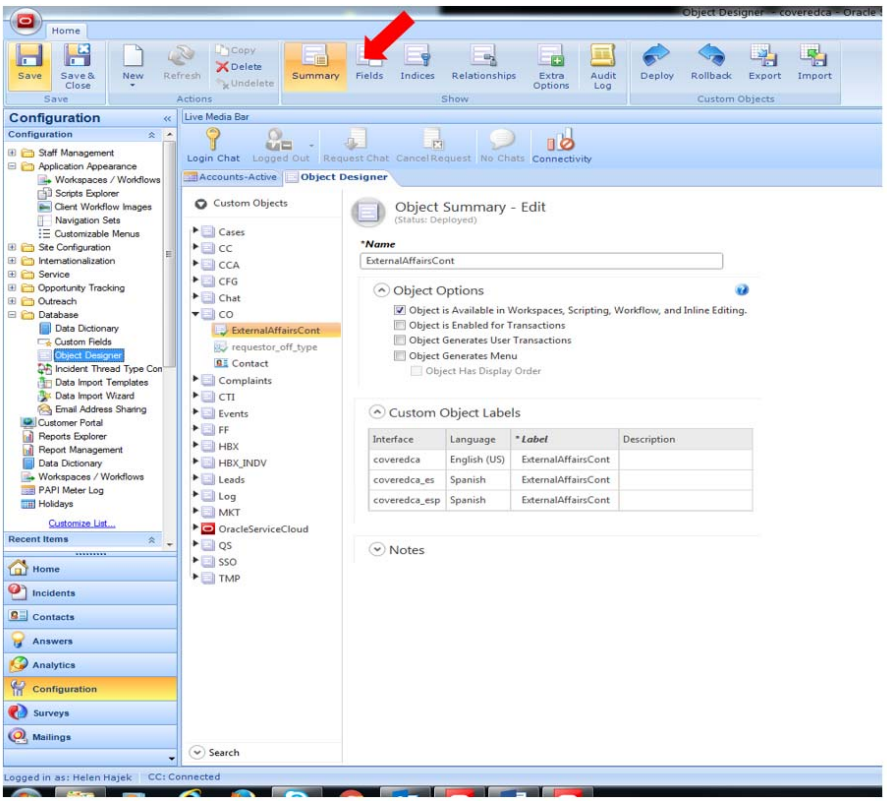


3) Create new custom object called External Affairs Cont

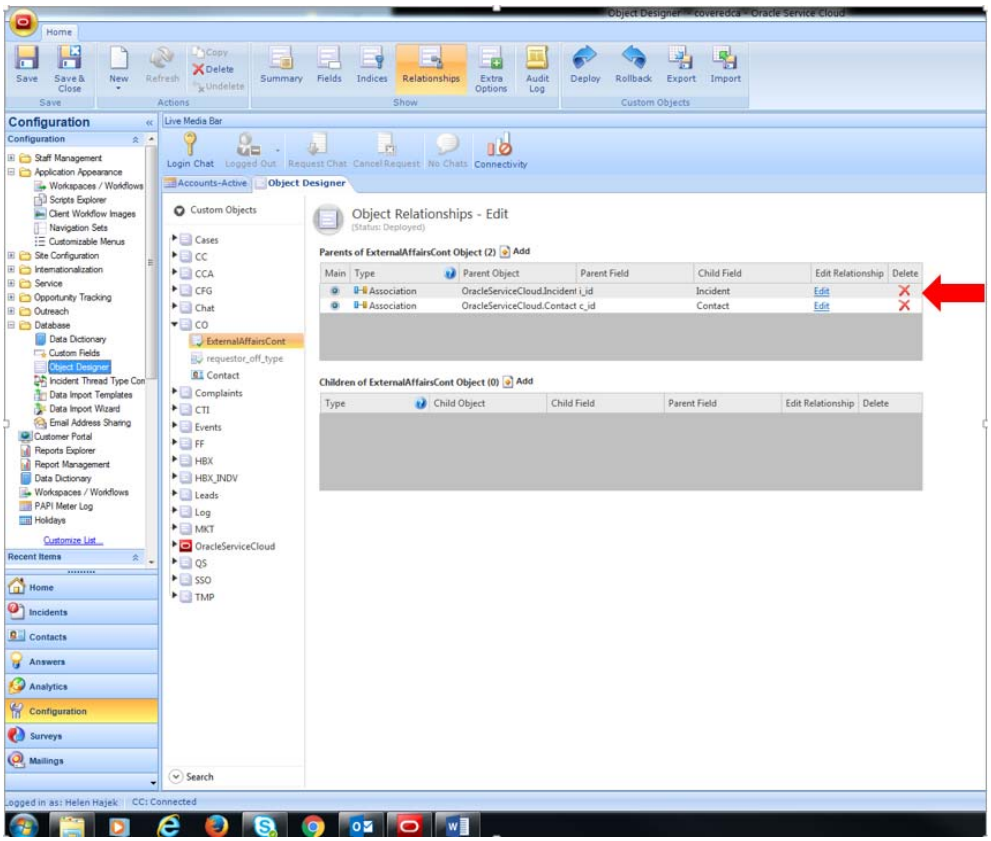


4) Set object lookup on incident





5) Create contact and incident association

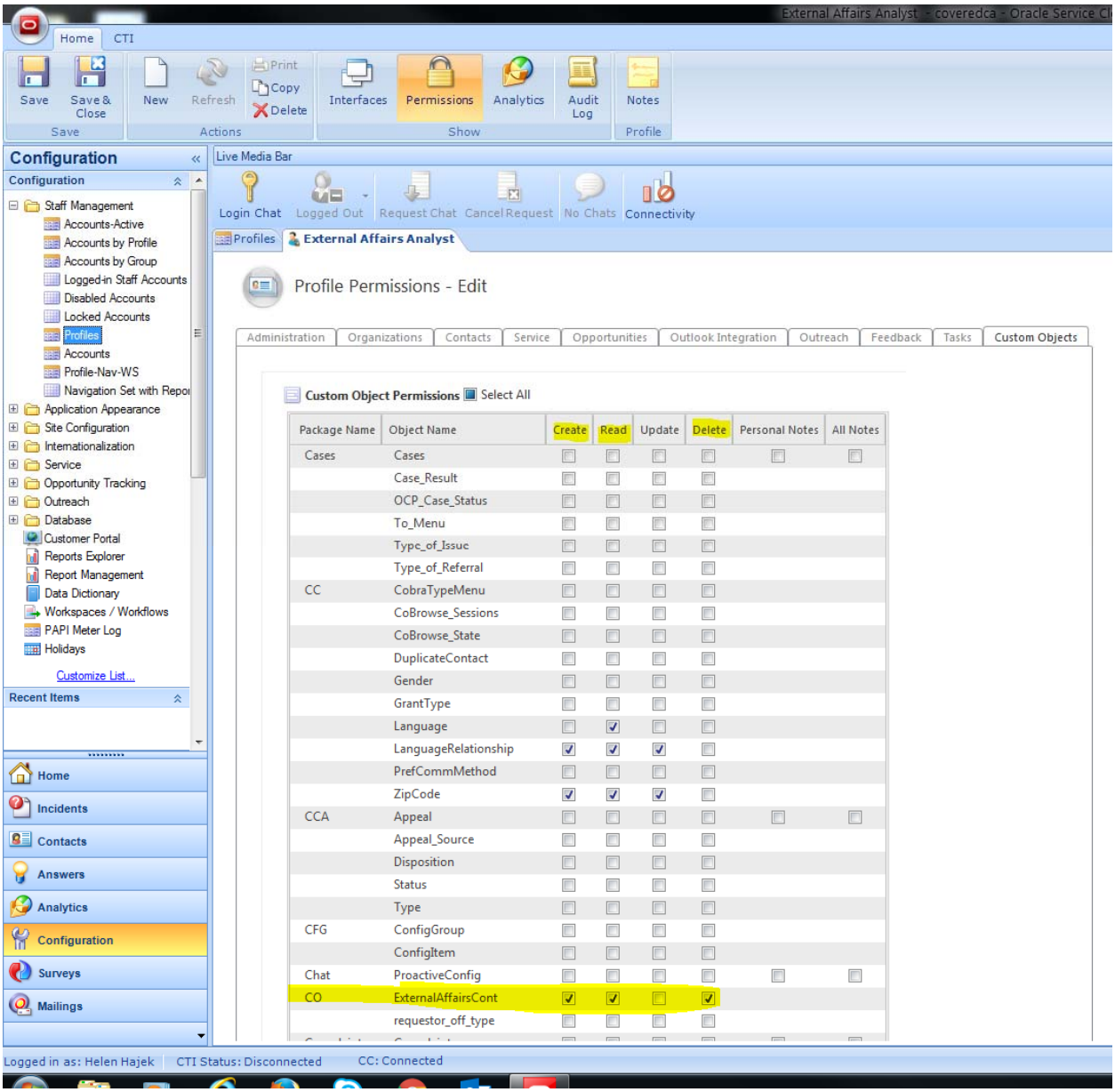


Note: This custom object allows External Affairs Analysts to add many-to-many relationship between requestors and incidents.

When External Affairs Analysts click add "new" from the incident workspace "requestor" tab, the analyst is adding a new relationship between the requestor and the incident. Only new relationship can be added, EA analysts cannot modified existing relationship.

6) Update EA Analyst profile

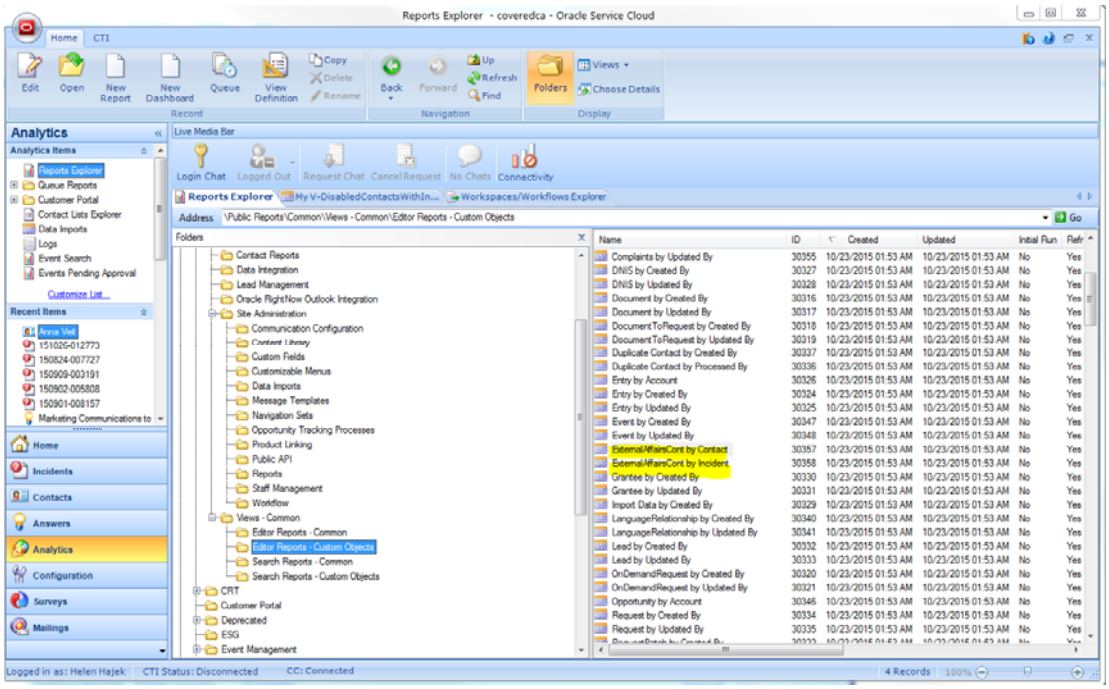
Click Permission on the ribbon, click custom object tab and uncheck update from "CO/ExternalAffiarsCon".



Note:

Delete option only allows EA analyst to remove incorrect or duplicate requestor entry from an incident, it will not delete the requestor contact.

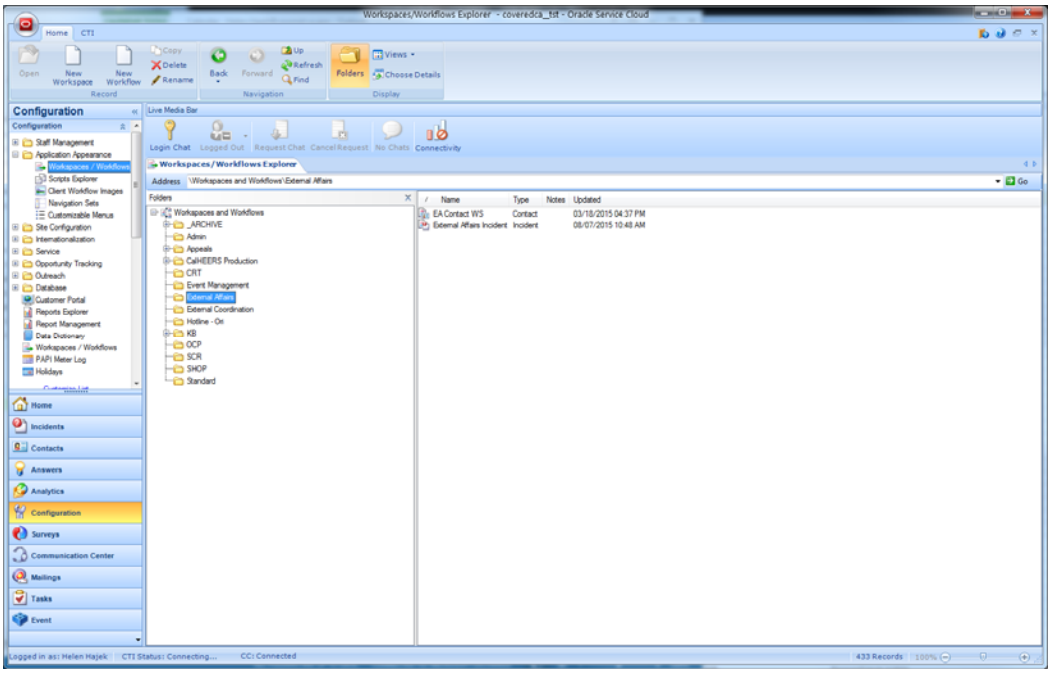
EA analyst should only add or delete requestor and incident relationship, no update is allowed.



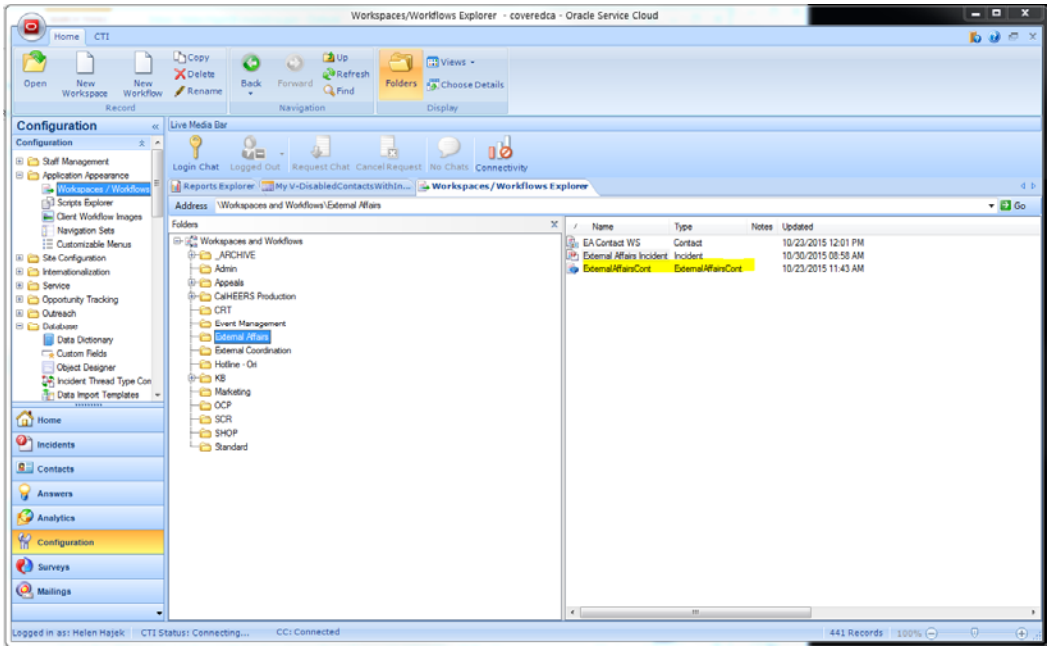
Note: New reports will be created by the system automatically when new custom objects are created. The following reports are created for the ExternalAffairsCont custom object.

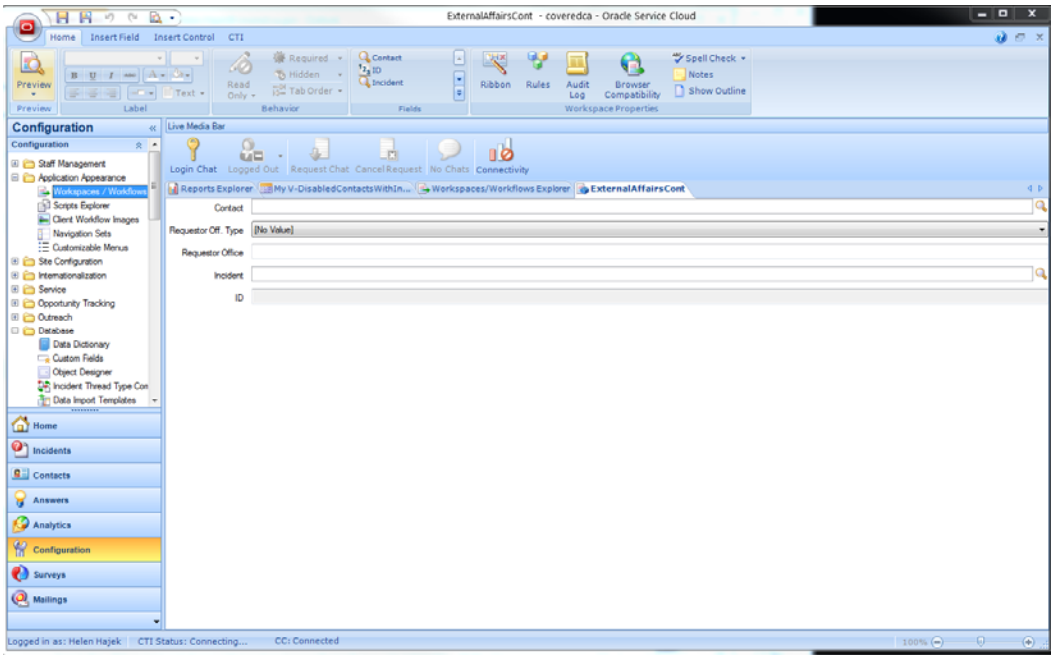
ExternalAffairsCont by Contact
ExternalAffairsCont by Incident

7) Update incident and contact workspace

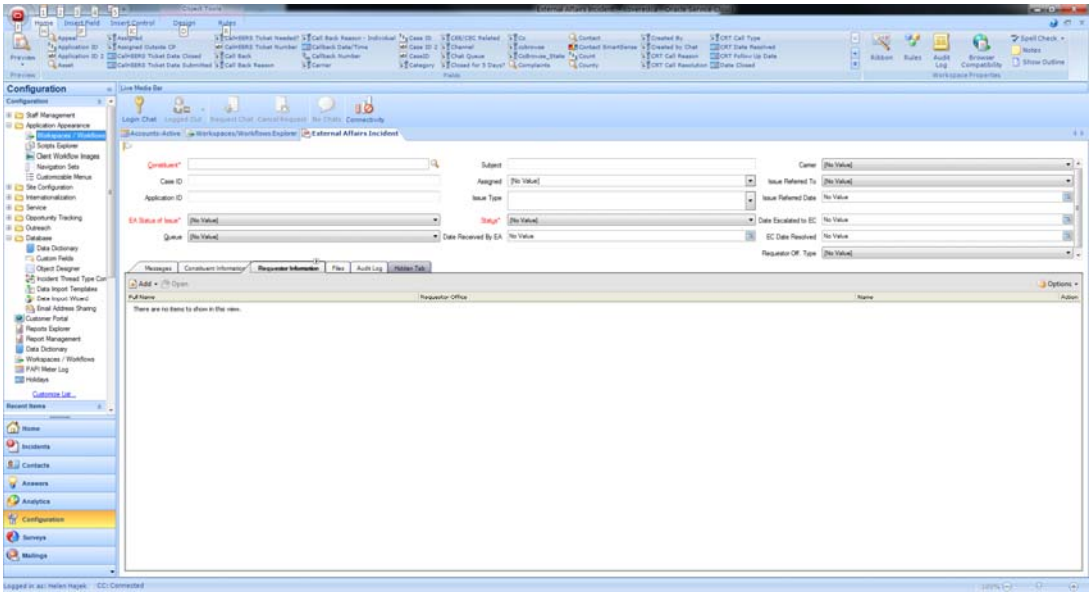


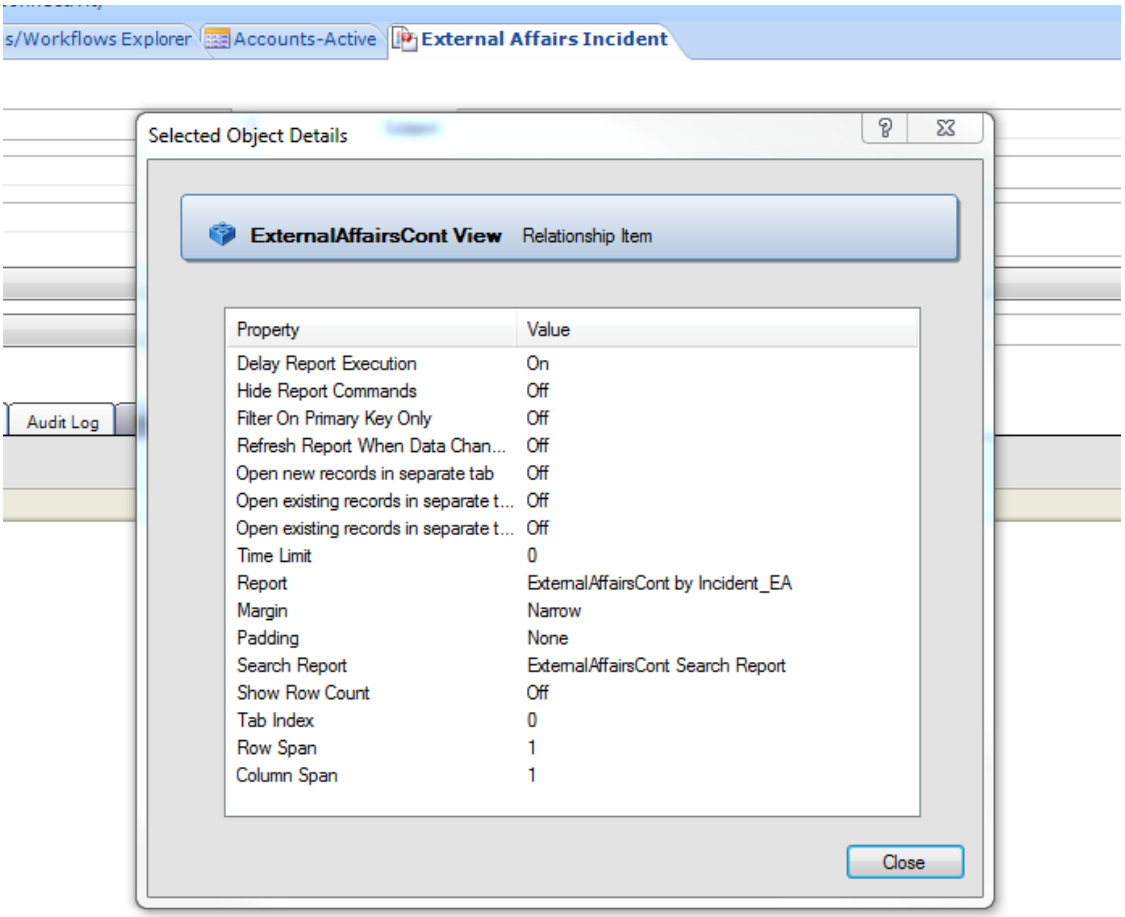
8) Create a new contact workspace with type=ExternalAffairsCont

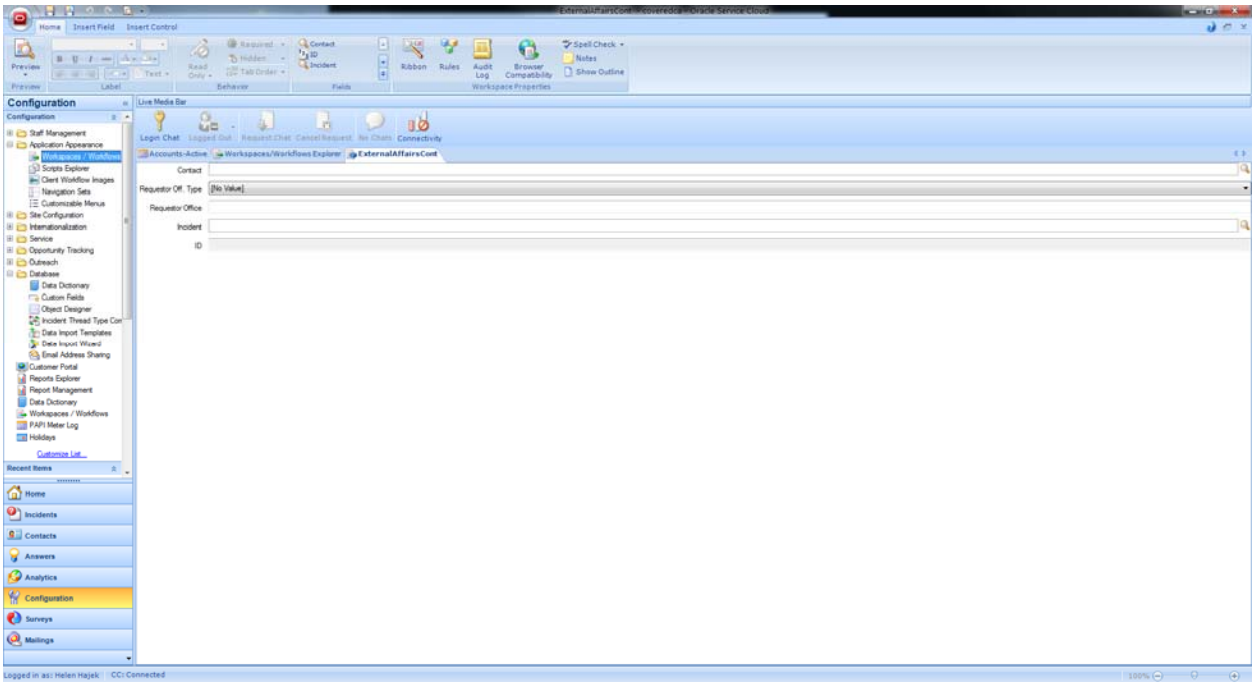




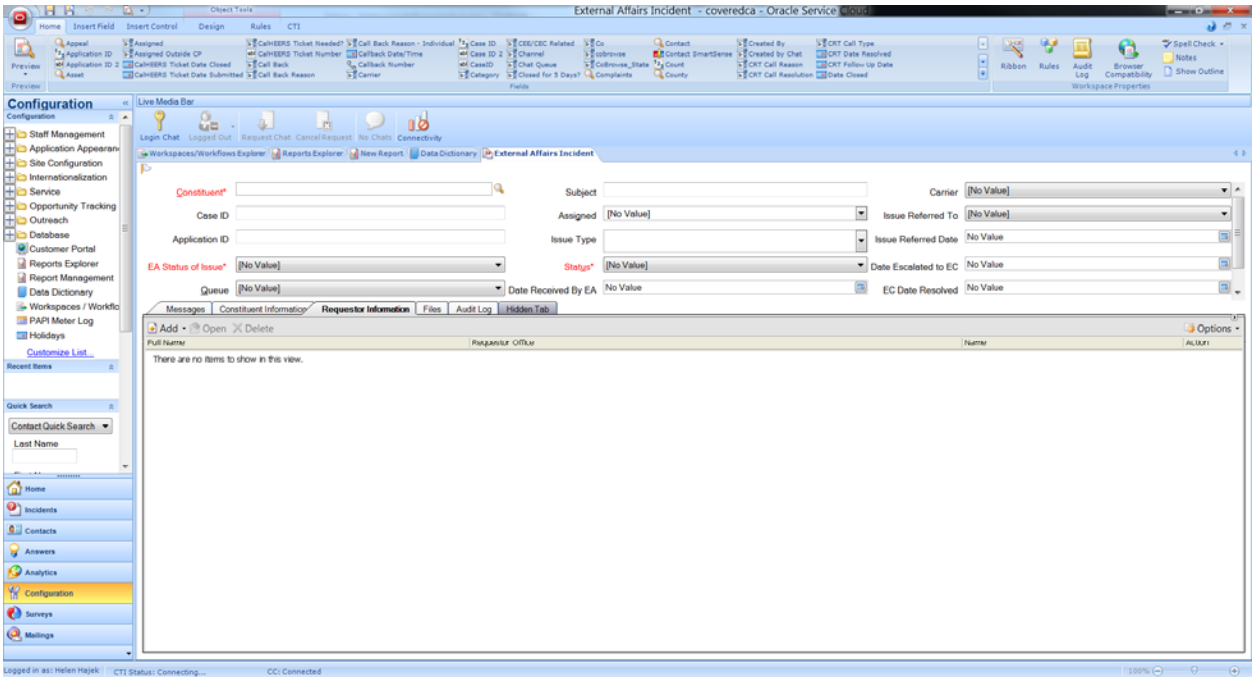
9) Update incident workspace "Requestor" tab




s/Workflows Explorer
Accounts-Active
External Affairs Incident
Selected Object Details
ExternalAffairsCont View
Relationship Item
Property
Value
Delay Report Execution
On
Hide Report Commands
Off
Filter On Primary Key Only
Off
Refresh Report When Data Chan...
Off
Open new records in separate tab
Off
Open existing records in separate t...
Off
Open existing records in separate t...
Off
Time Limit
0
Report
ExternalAffairsCont by Incident_EA
Margin
Narrow
Padding
None
Search Report
ExternalAffairsCont Search Report
Show Row Count
Off
Tab Index
0
Row Span
1
Column Span
1
Audit Log
Close


Configuration
Contact
Requestor Off. Type
Requestor Office
Incident
ID

10) Update EA contact workspace to include new Requestor tab



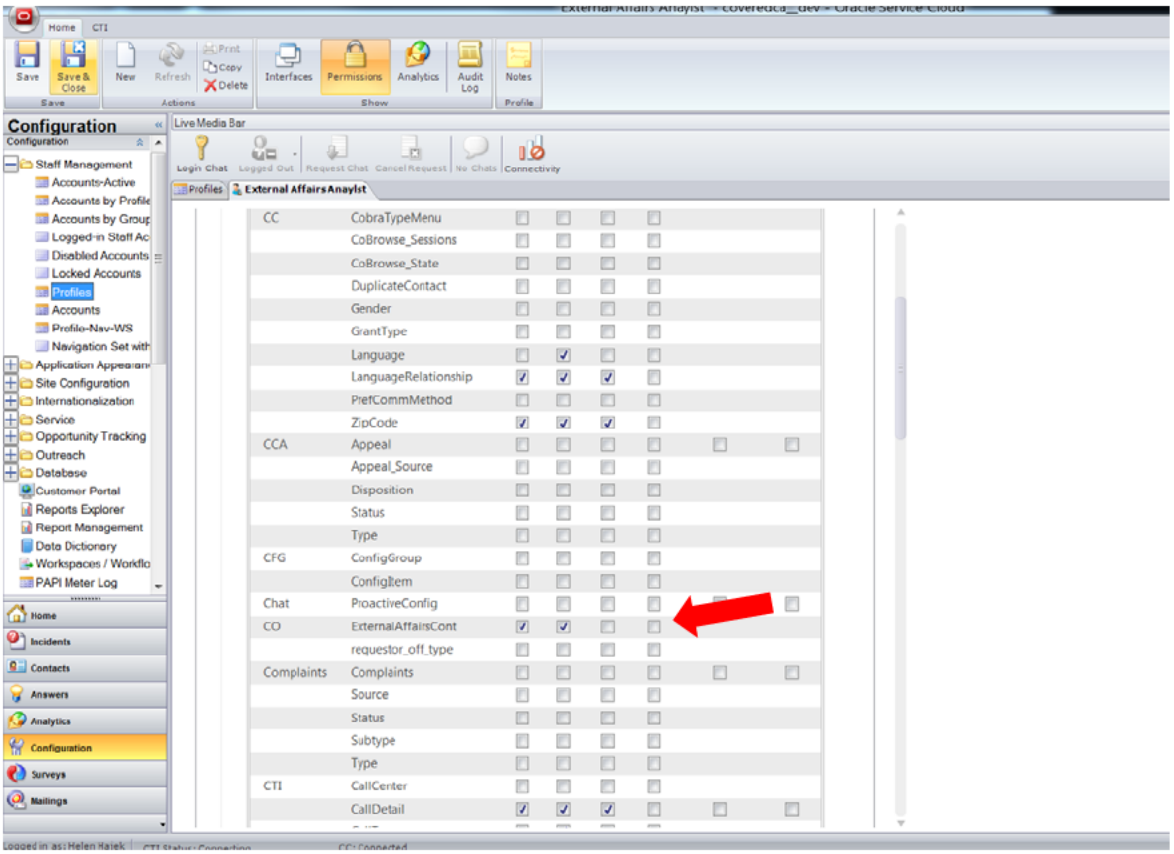
Known risk: incidents created prior to the fix on 10/23/2015 did not have the correct requestor's information attached to the incident, the incidents only have the requestor's office and office type.

IT reviewed the new process and risk with [redacted] (External Affairs Analyst) on 10/26/2015. [redacted] will check with his manager to determine if the requestor's information need to be added back to the incidents. External Affairs has about 500 incidents between March 2015 and October 2015.

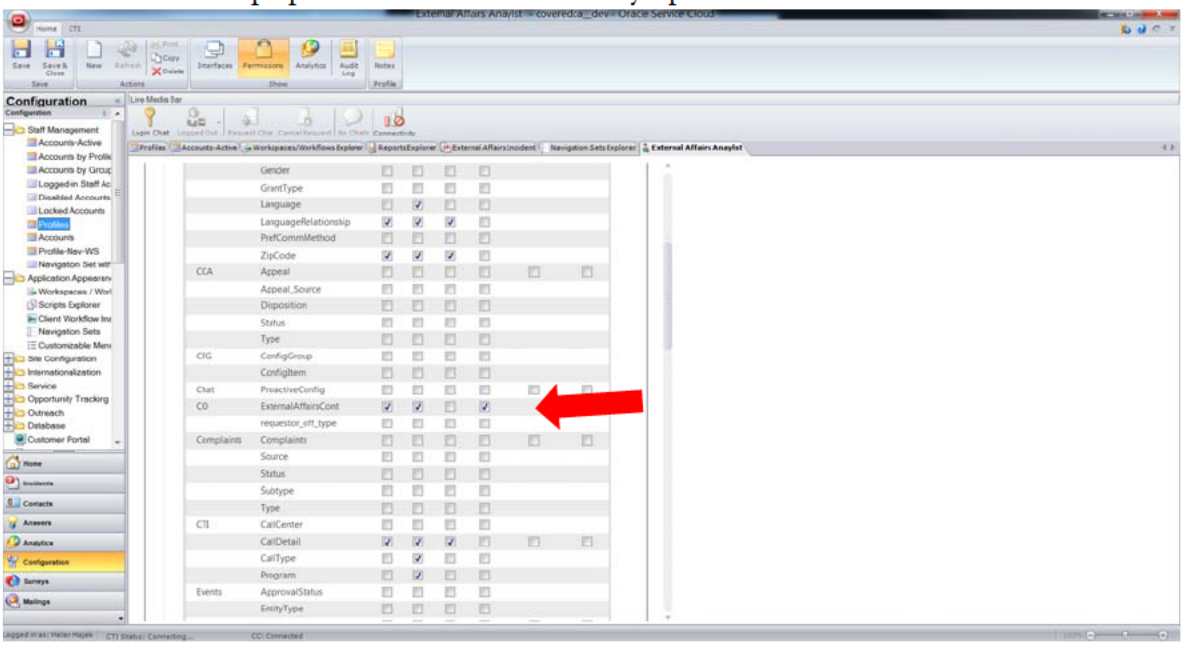
IT ticket 15620 - Updating Requestors in CRM – EA was opened to have requestor information added back to these incidents.

1) Added requestors' information to EA incidents created prior to 10/23/2015 – completed
   - Please refer to EA status of incidents 20151023 (BJ edits2) HH.xlsx for details (spreadsheet has been uploaded to ticket 15620)
2) Added delete functionality for ExternalAffairsCont object – completed
   - This functionality allows EA analysts to remove duplicate requestor entry from an incident (see attached for instructions)
3) Updated existing Incident Search to include all EA incident statuses - completed
4) Updated existing contact search to include requestor incident count - completed
5) Added EA requestor Opt-in Report – Completed
   - This report allows EA analyst to identify requestors with global and outreach opt-in that are not set to "No".
6) Reviewed and updated existing EA reports – completed

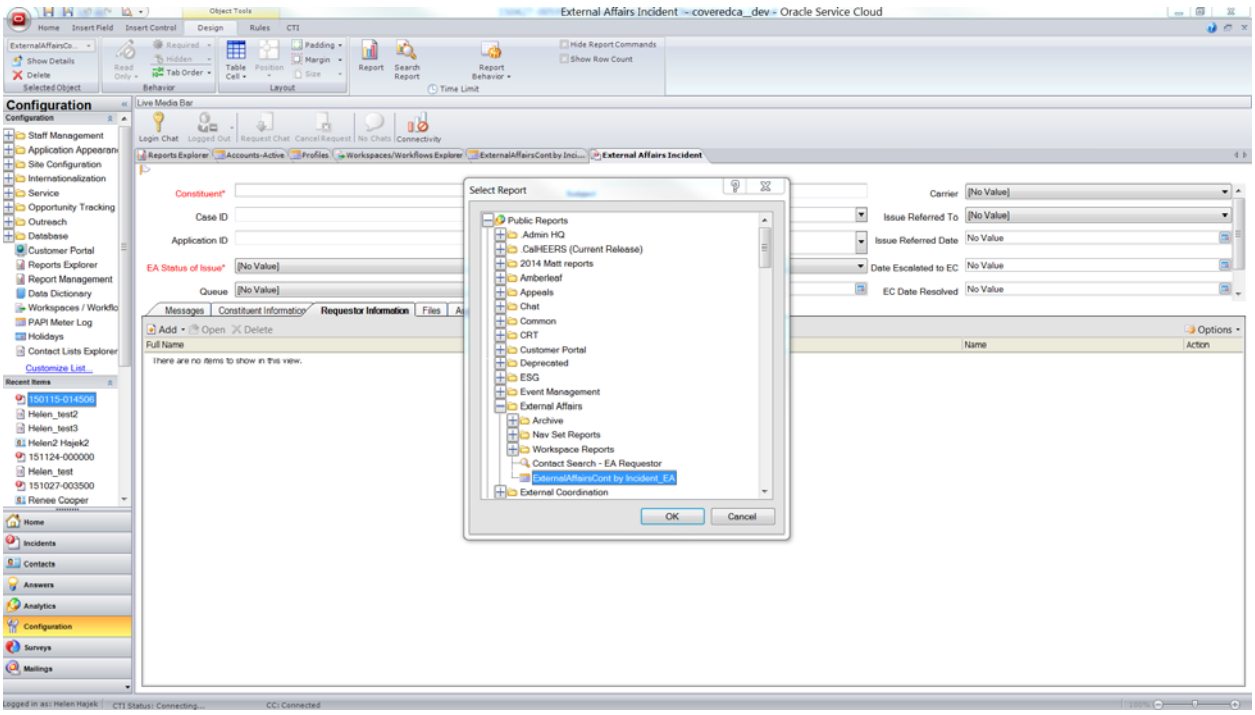
Add "delete" option to ExternalAffairsCont object.



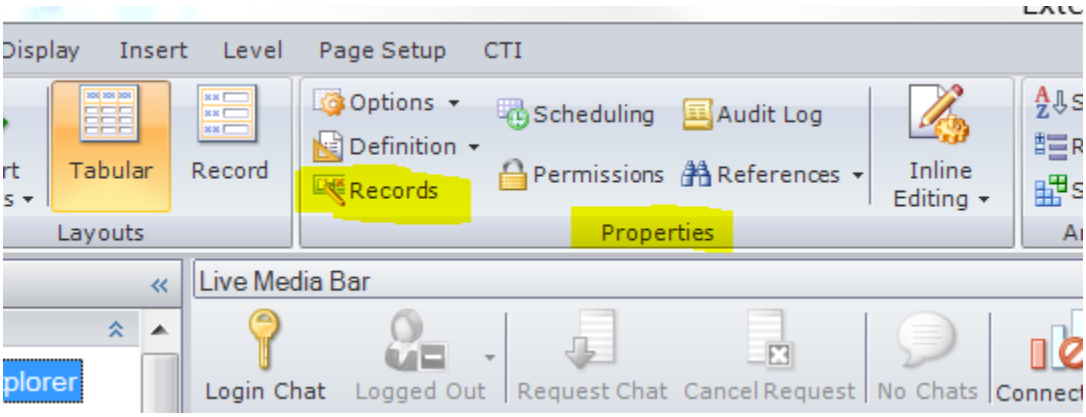
Add delete relationship option to External Affairs Analyst profile.



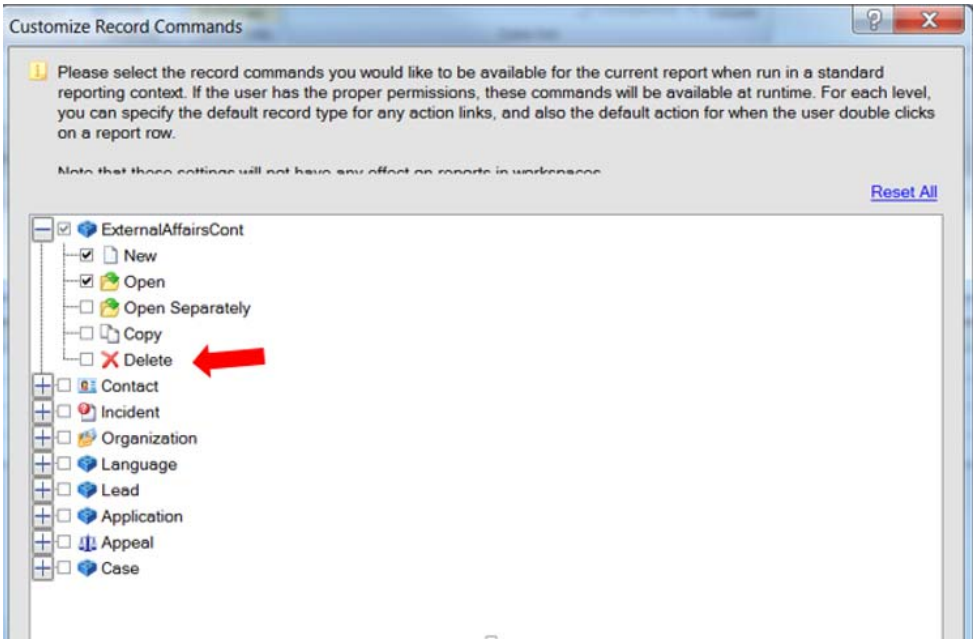
Update - ExternalAffairsCont by Incdient_EA 106944

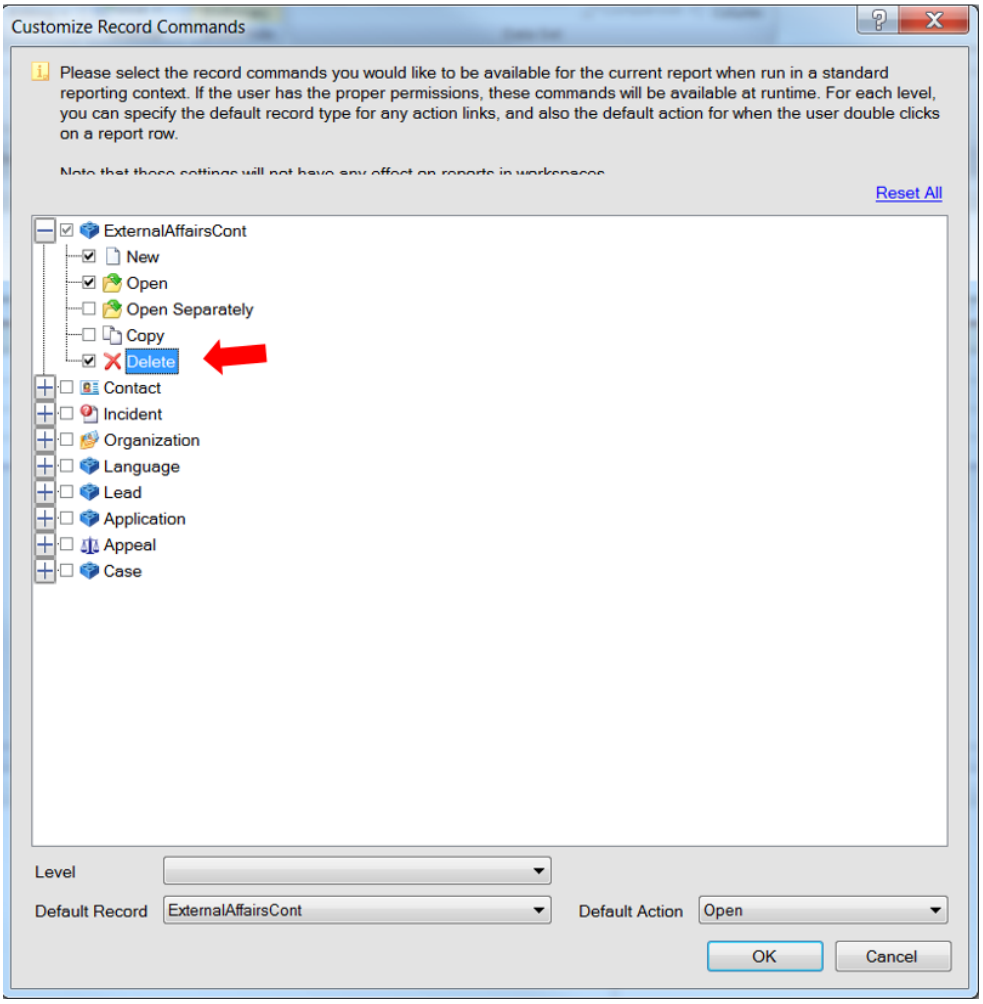


Select record from the ribbon

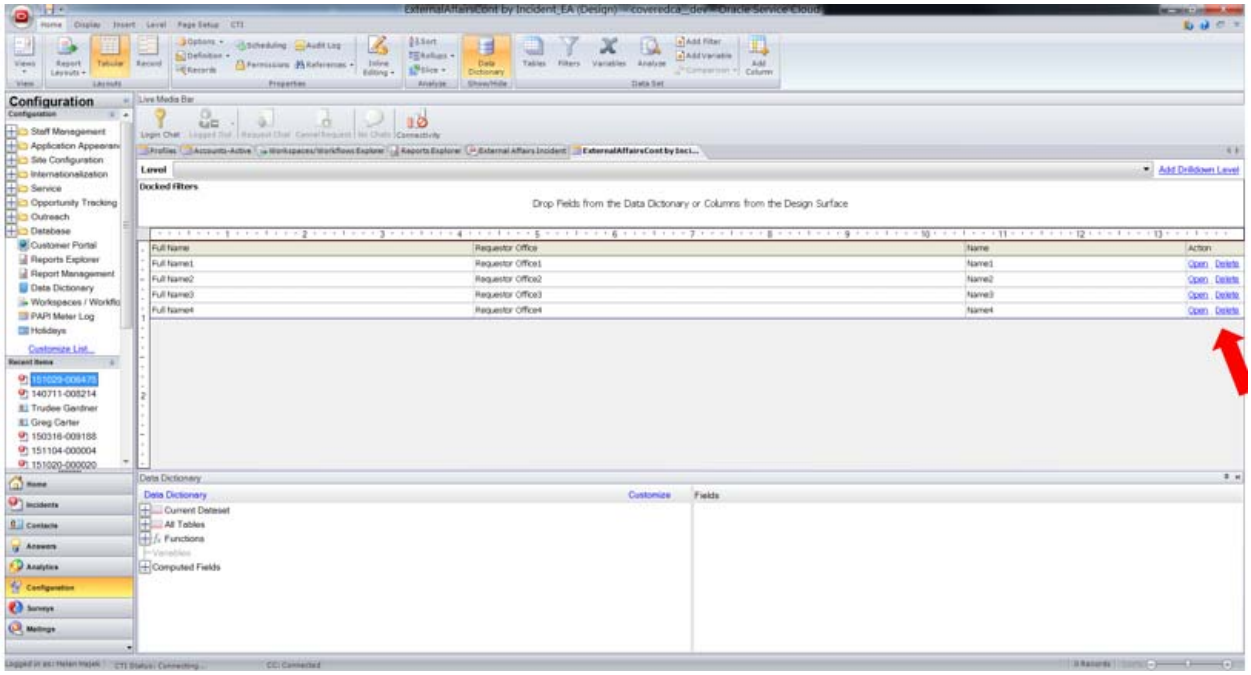


Select the delete option





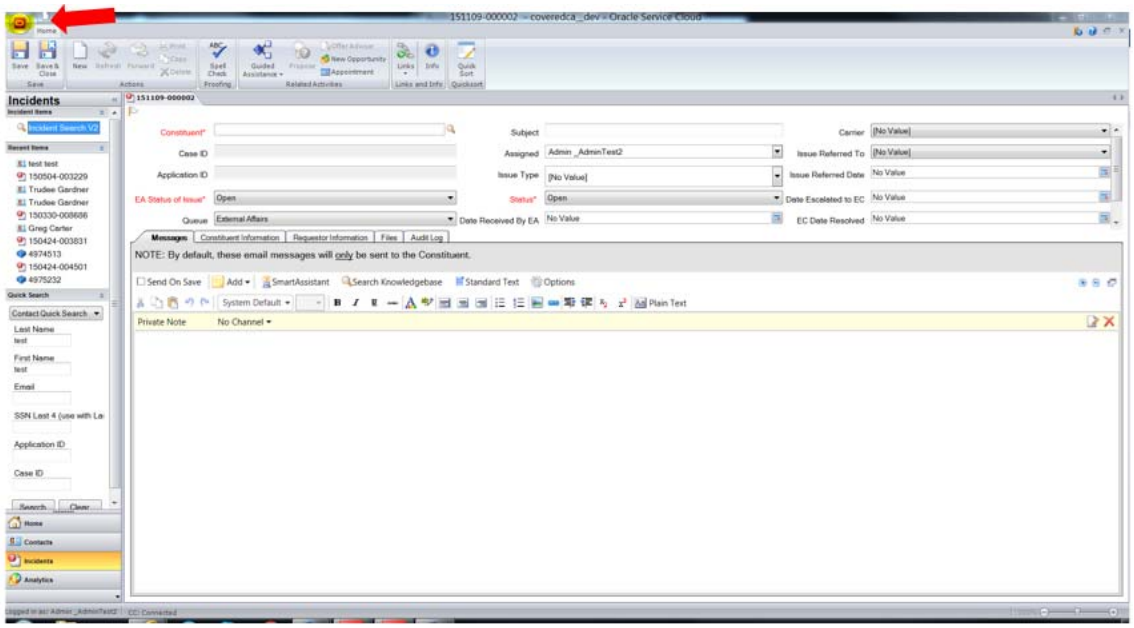
Right click action to add delete function to the report.



4 USER EXPERIENCES

External Affairs – How to correctly assign the Requestors to new incidents

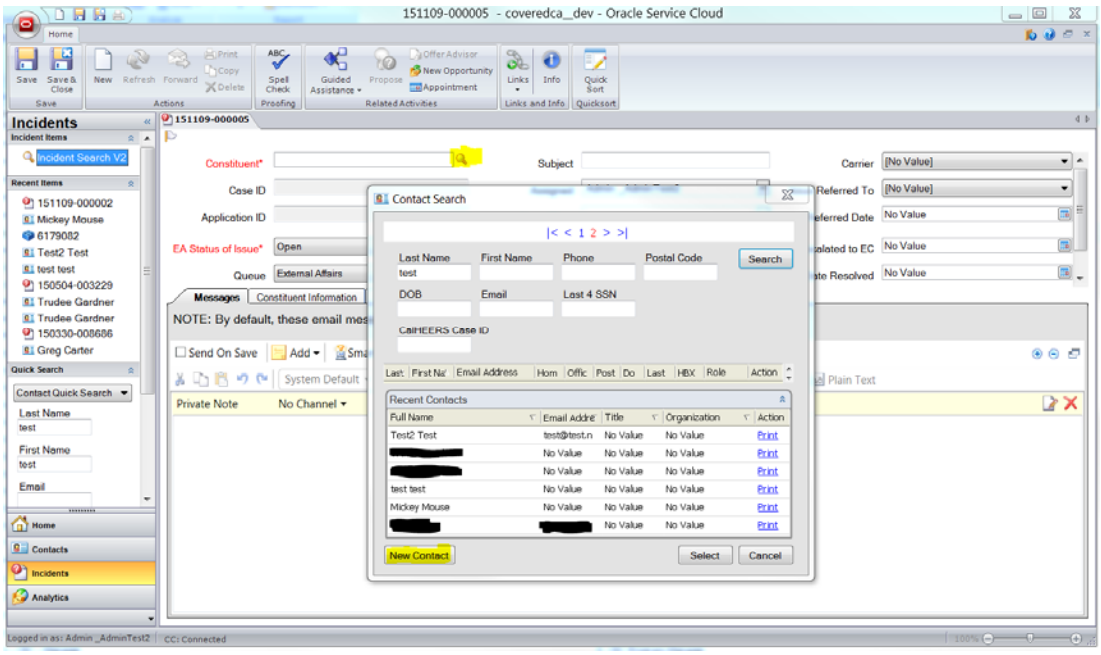
1) Add a new incident
    a. Click the red Oracle button on the left upper corner.
    b. Click incident.
        i. New incident tab opens.



2) Add the constituent information
   a. Click the search button to find the constituent
      i. The contact search dialog box opens

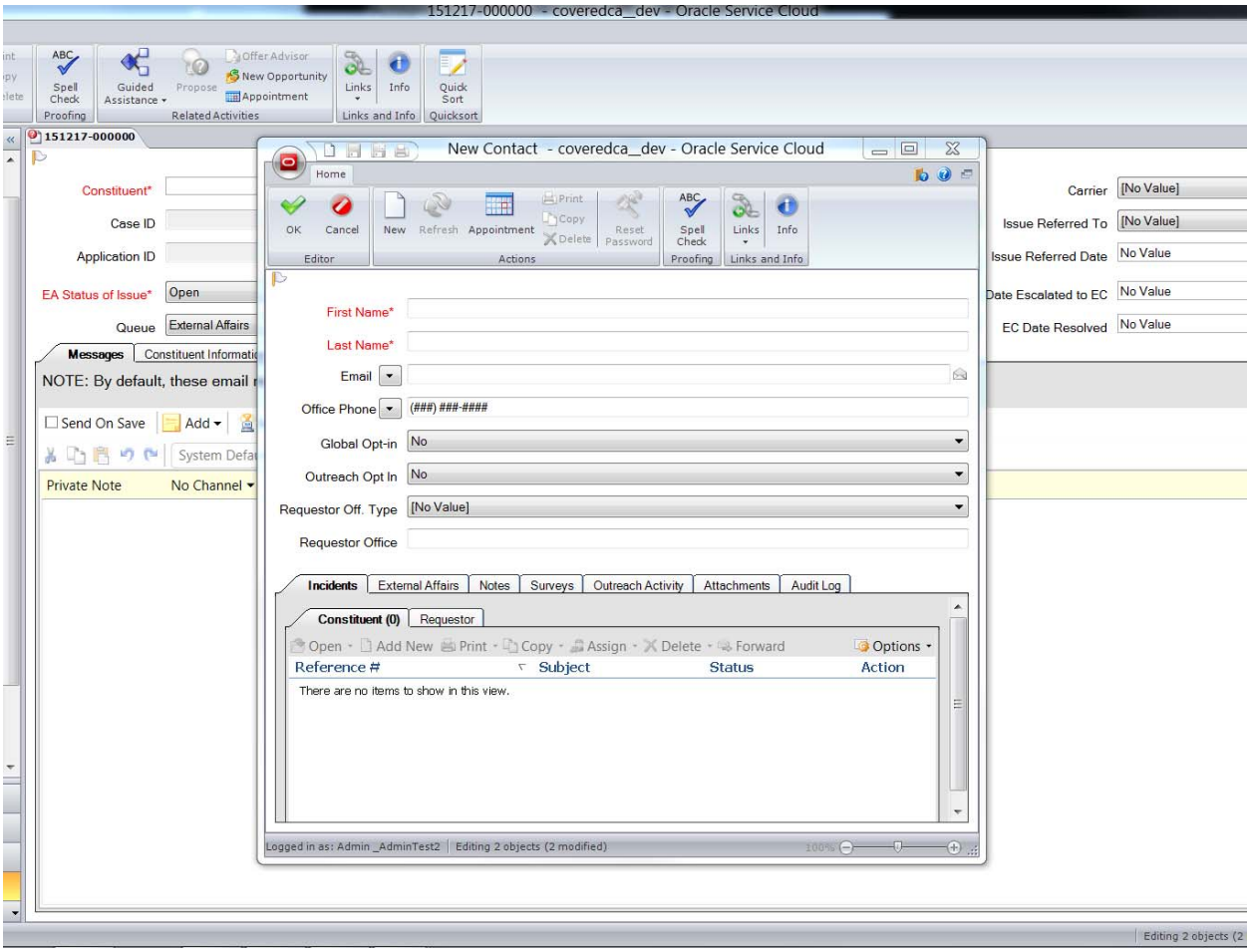
3) Enter the constituent's last name and first name in the search dialog box.
   a. If constituent is found - select the appropriate constituent from the search result and the constituent information will be added to the new incident.

   Note: Incidents associated with that constituent can be found in the incident/constituent tab.

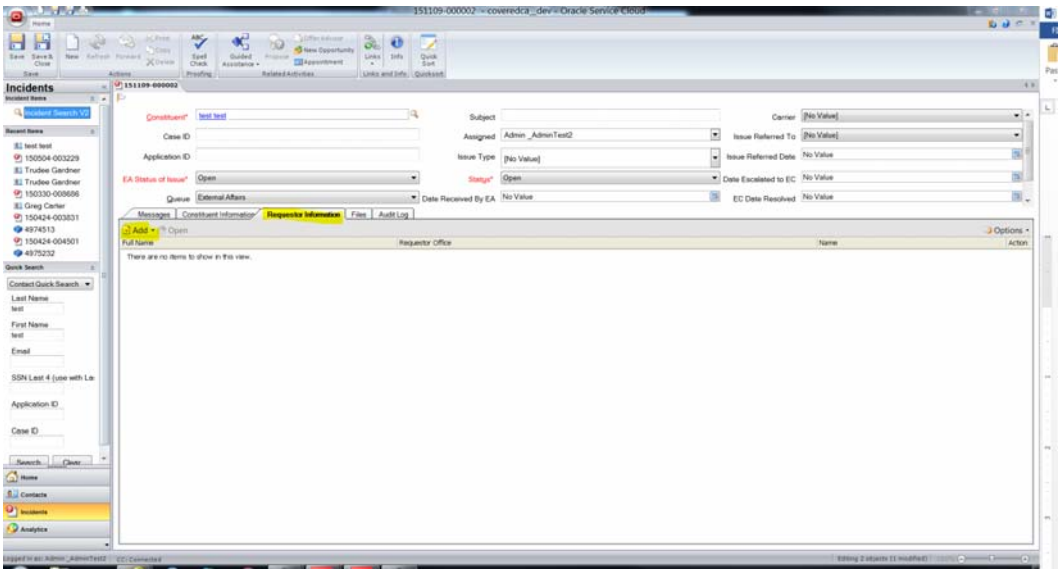


If constituent is not found – click the new contact button to add the constituent

   i. Add the constituent information and click ok.
   ii. The constituent information will be added to the new incident.


151217-000000 - coveredca_dev - Oracle Service Cloud
Spell Check
Guided Assistance
Propose
Offer Advisor
New Opportunity
Appointment
Links
Info
Quick Sort
Proofing
Related Activities
Links and Info
Quicksort
151217-000000
Constituent*
Case ID
Application ID
EA Status of Issue*
Open
Queue
External Affairs
Messages
Constituent Informati
NOTE: By default, these email
Send On Save
Add
Private Note
No Channel
Carrier
[No Value]
Issue Referred To
[No Value]
Issue Referred Date
No Value
Date Escalated to EC
No Value
EC Date Resolved
No Value
New Contact - coveredca_dev - Oracle Service Cloud
Home
OK
Cancel
New
Refresh
Appointment
Print
Copy
Delete
Reset Password
Editor
Actions
Proofing
Links and Info
First Name*
Last Name*
Email
Office Phone
(###) ###-####
Global Opt-in
No
Outreach Opt In
No
Requestor Off. Type
[No Value]
Requestor Office
Incidents
External Affairs
Notes
Surveys
Outreach Activity
Attachments
Audit Log
Constituent (0)
Requestor
Open
Add New
Print
Copy
Assign
Delete
Forward
Options
Reference #
Subject
Status
Action
There are no items to show in this view.
Logged in as: Admin _AdminTest2
Editing 2 objects (2 modified)
Editing 2 objects (2

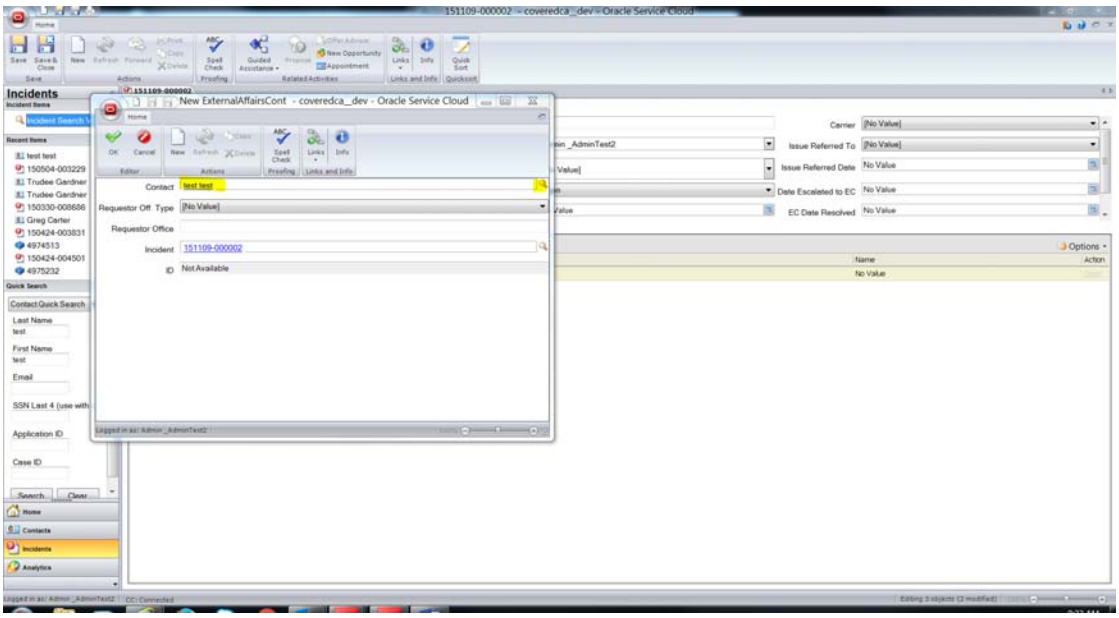
4) Click the requestor tab to add the requestor information to the new incident.
   a. Click Add- Add new
   b. The requestor information dialog box opens



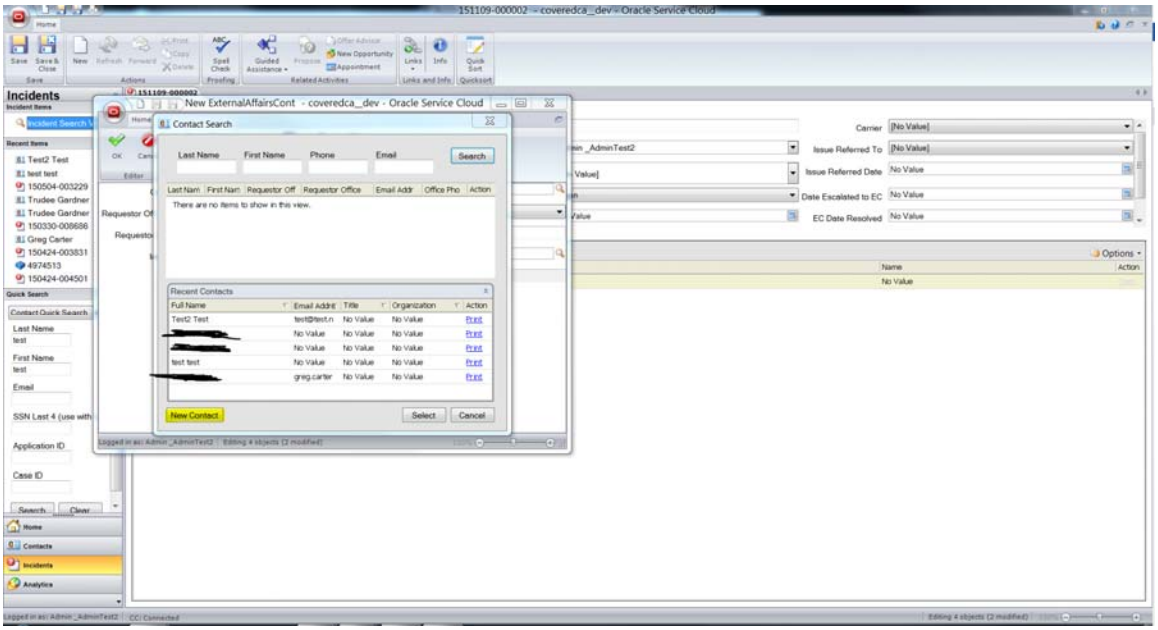
5) Click the search box to find the requestor information.

Important Note: The system automatically populates the requestor contact name with the constituent's name. Currently, there is no way to have the requestor contact name field default to 'No Value" when it opens.

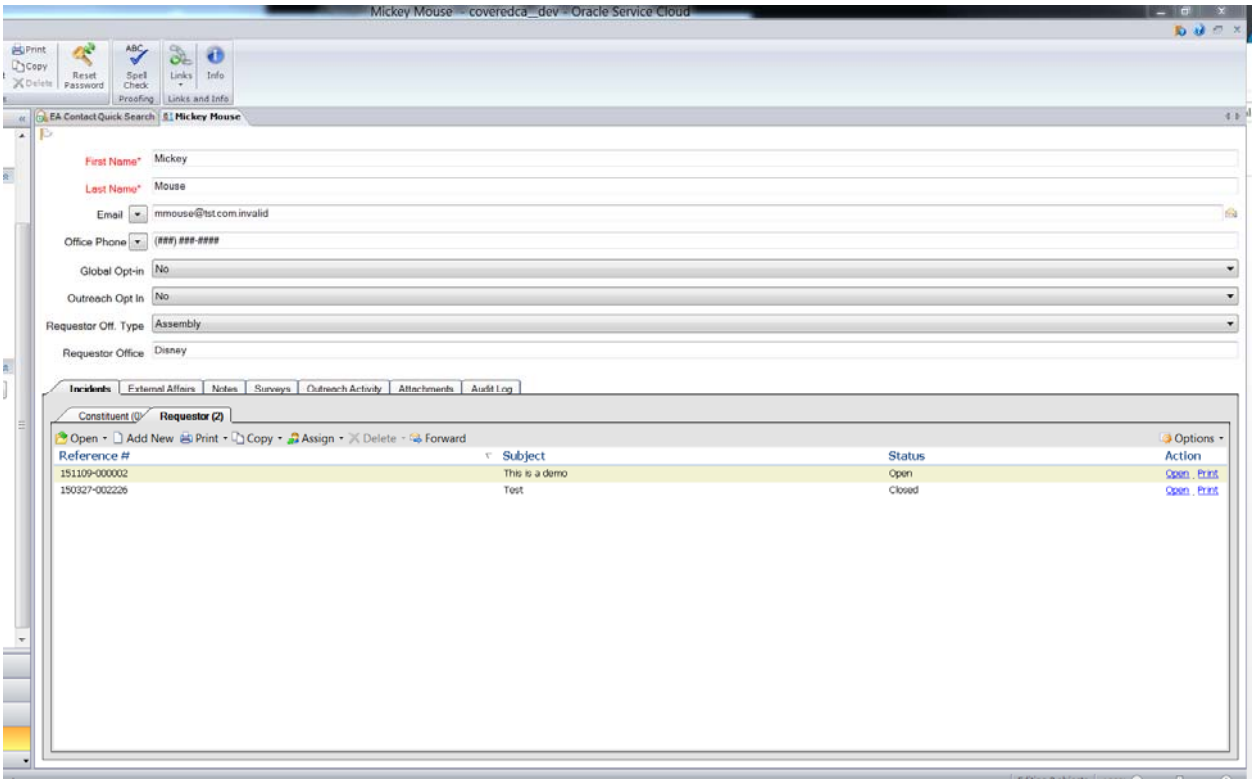
The constituent's name will be removed from the requestor information as soon as the requestor's name is added.

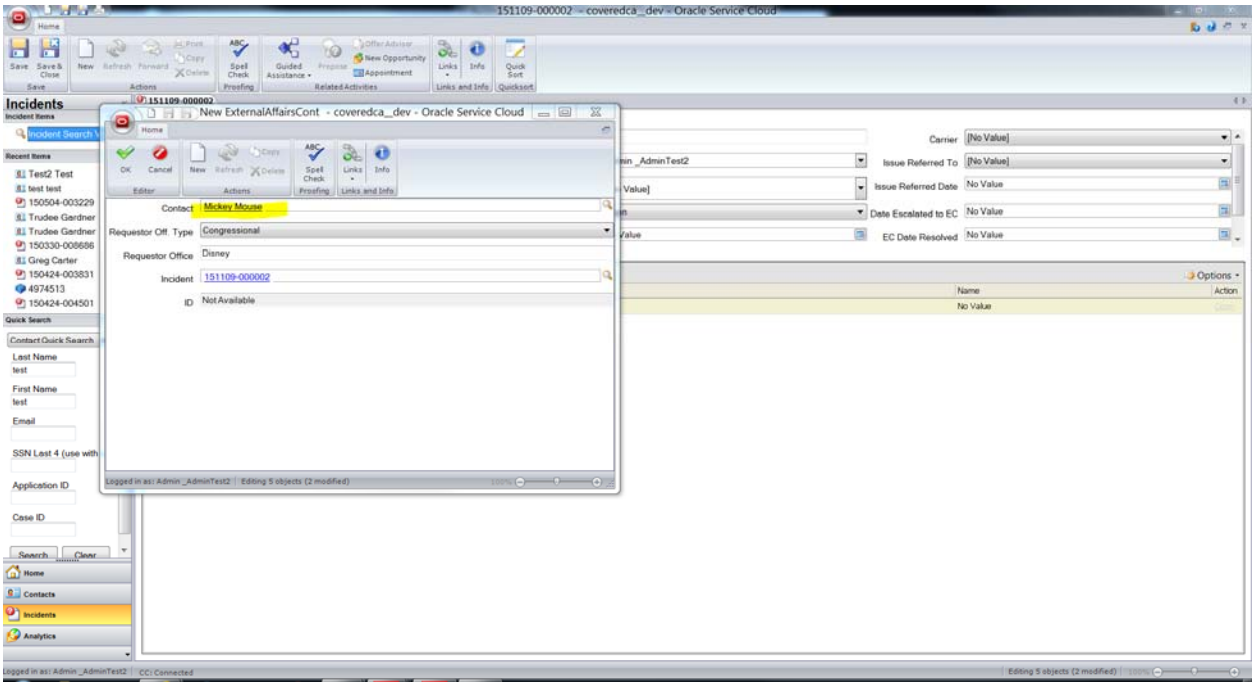


6) Enter the requestor's last name and first name in the search dialog box.
   a. If requestor is found - select the appropriate requestor from the search result and the requestor information will be added to the new incident.

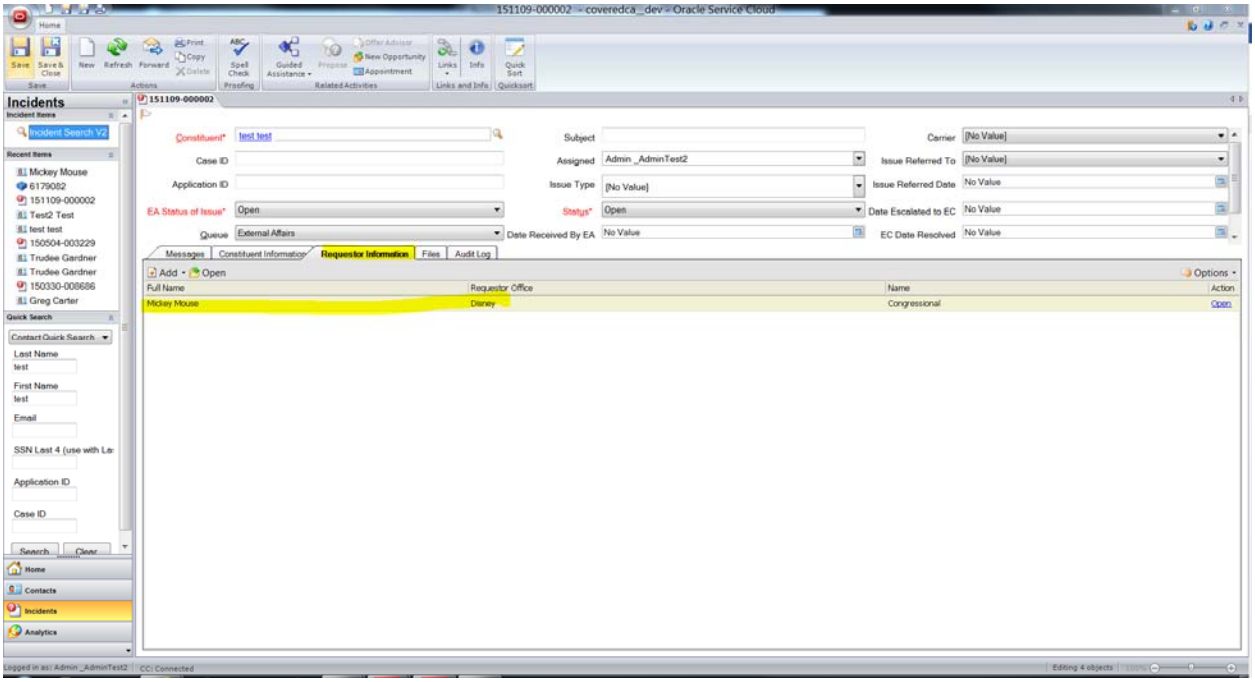


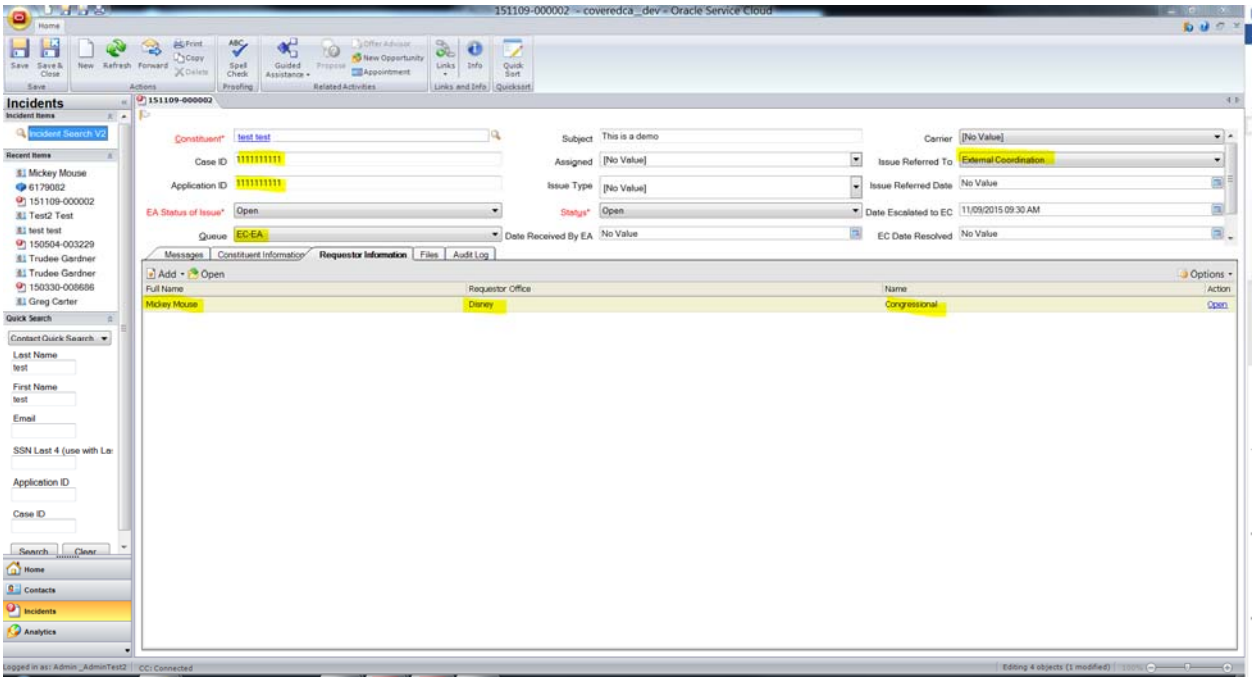
b. If the requestor is not found – click the new contact button to add the requestor.
   i. Add the requestor information and click ok.
   ii. The requestor information will be added to the new incident.





7) Click OK and click save from the ribbon and the requestor information will be added to the new incident (Requestor Information tab).

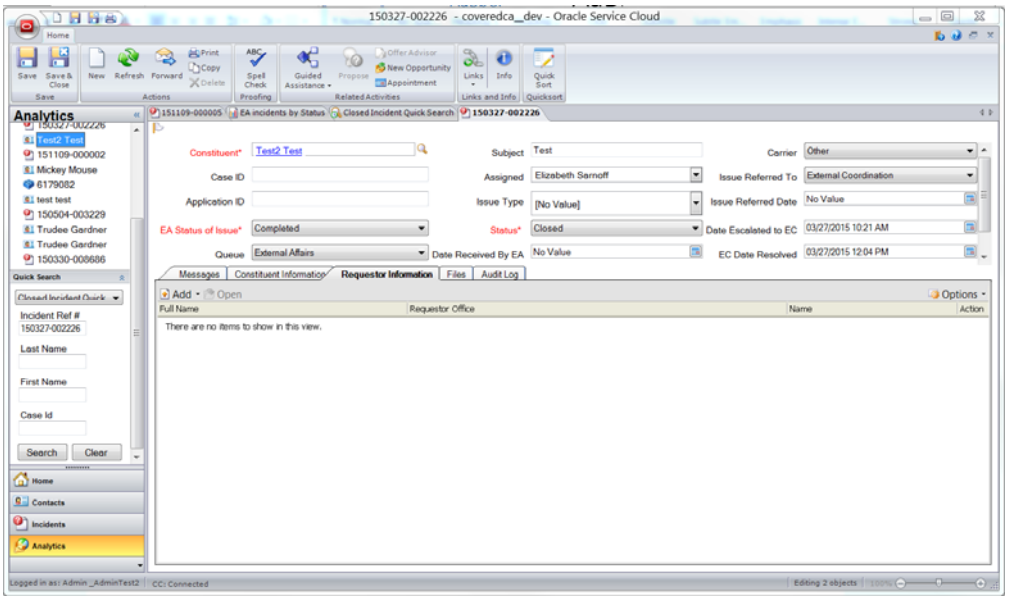




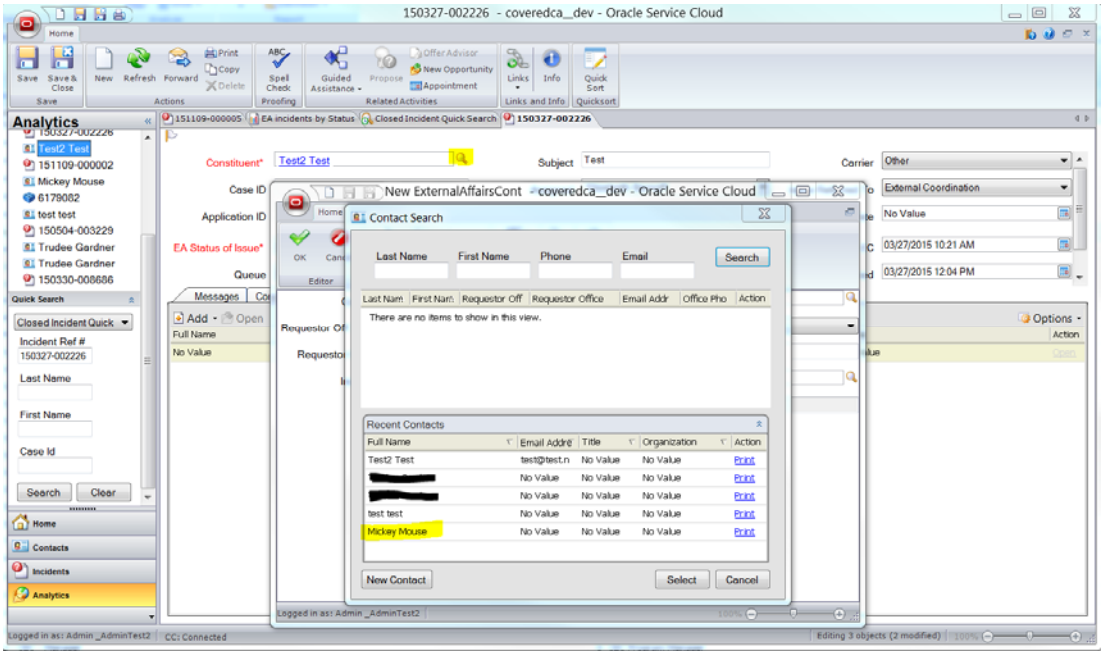
8) Enter the remaining incident issue information and click "Save and close" from the ribbon.

External Affairs – Linking a requestor to an existing incident

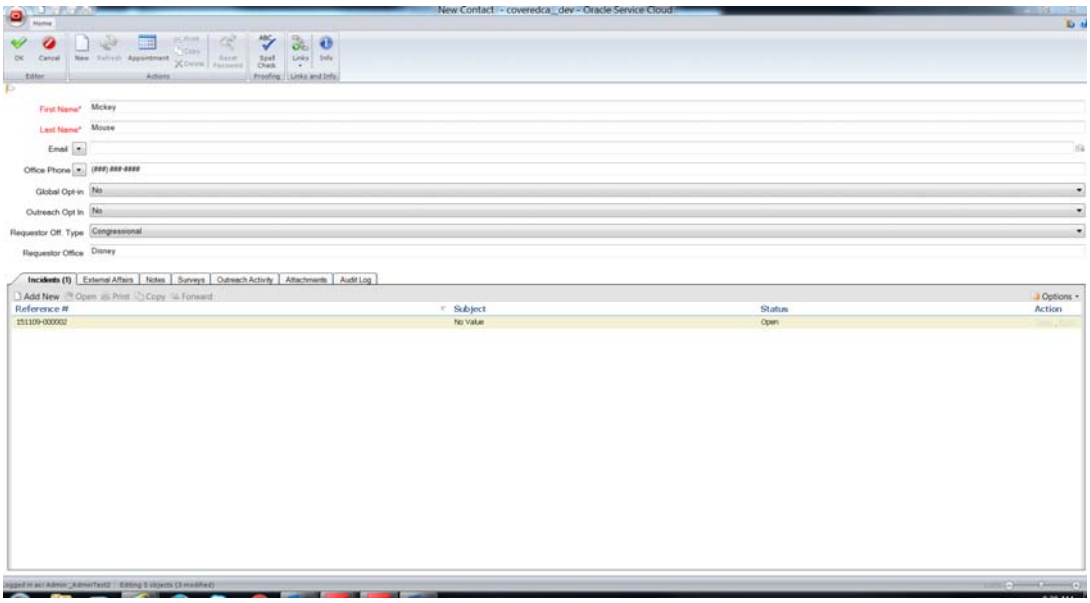
1) Search and open incident with missing requestor information.
   a. Click on the requestor information tab
   b. Click Add/Add new and the requestor search dialog box open.

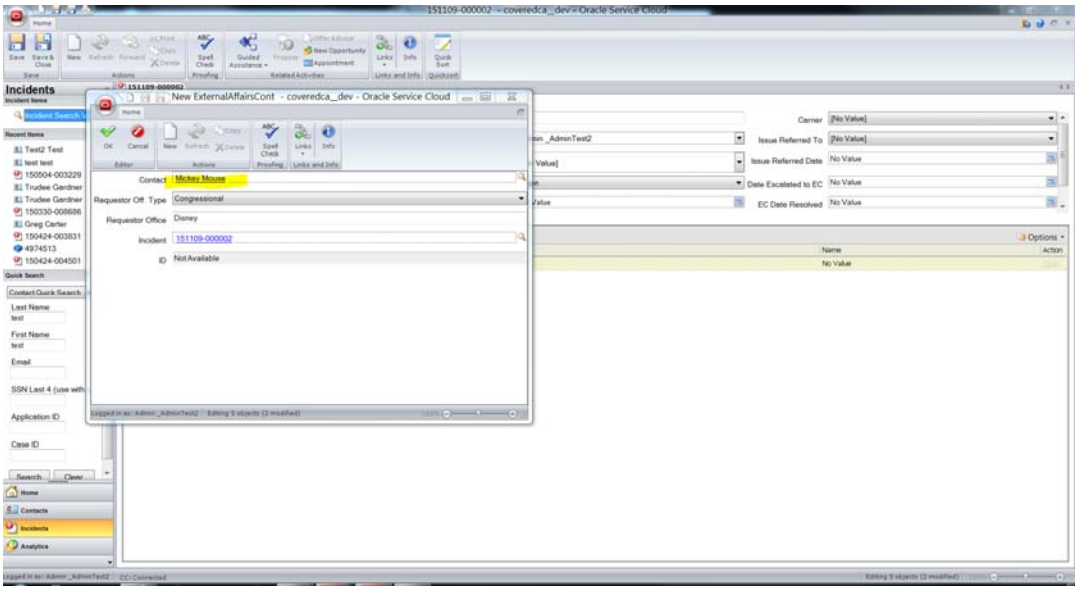


2) Enter the requestor's last name and first name in the search dialog box.
   a. If requestor is found - select the appropriate requestor from the search result and the requestor information will be added to the new incident.

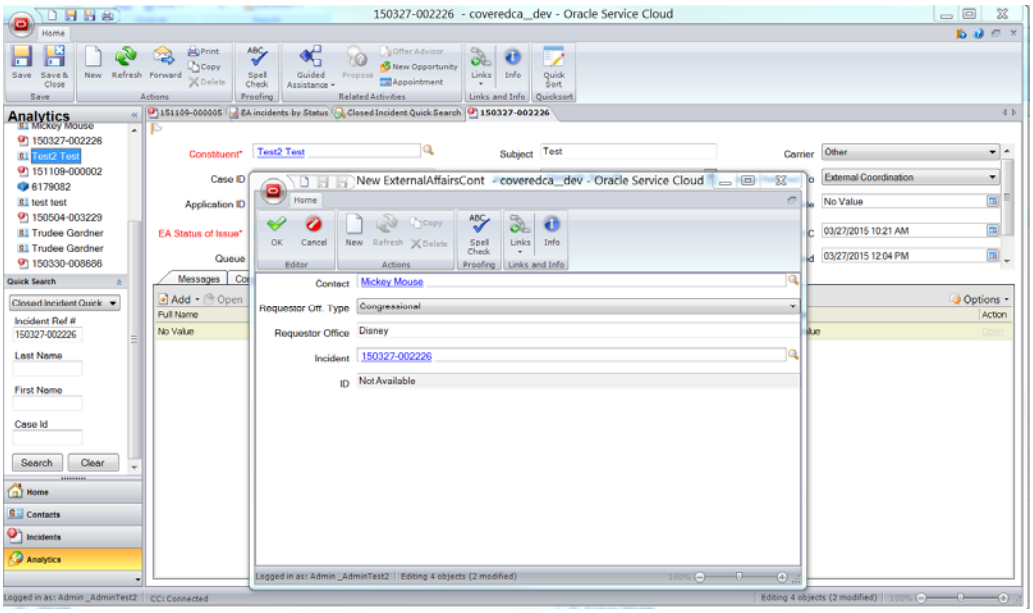


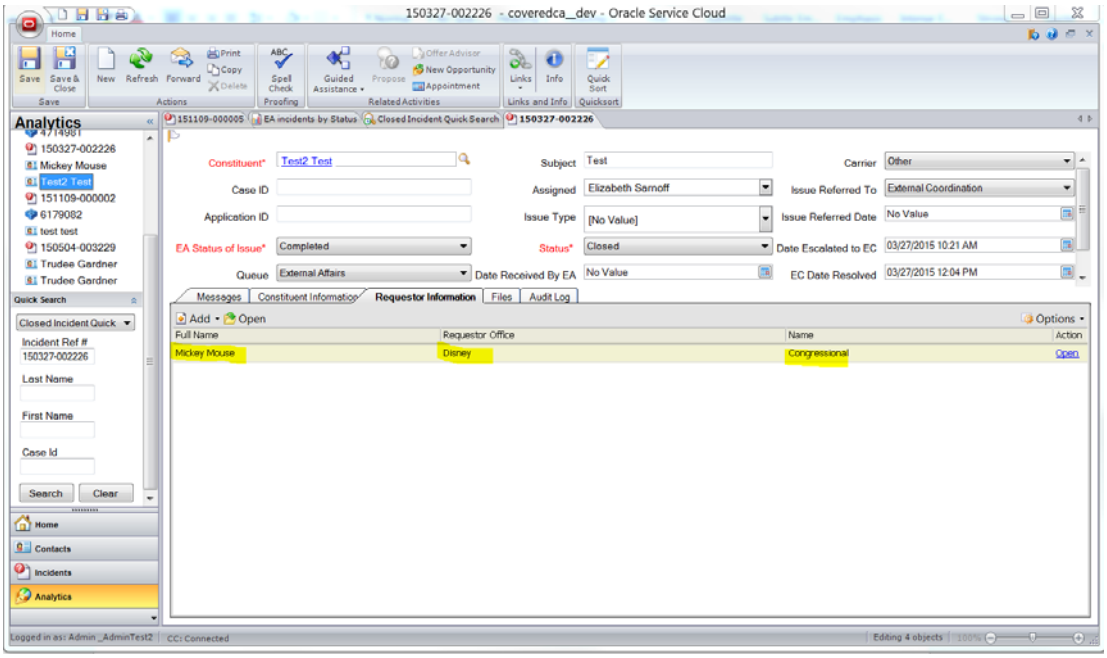
   b. If the requestor is not found – click the new contact button to add the requestor.
      i. Add the requestor information and click ok.
      ii. The requestor information will be added to the new incident.





3) Click OK and click save from the ribbon and the requestor information will be added to the new incident.



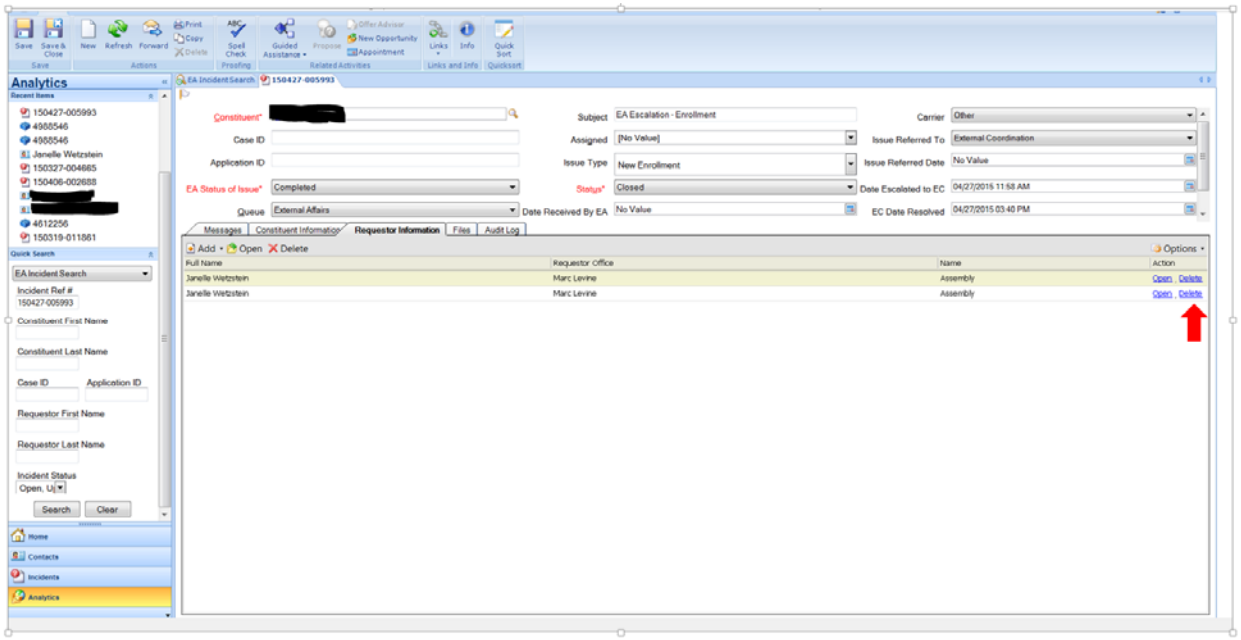


4) Click "save and close" from ribbon to complete the update and close out of the incident.

How to remove incorrect or duplicate requestor entry from an incident.

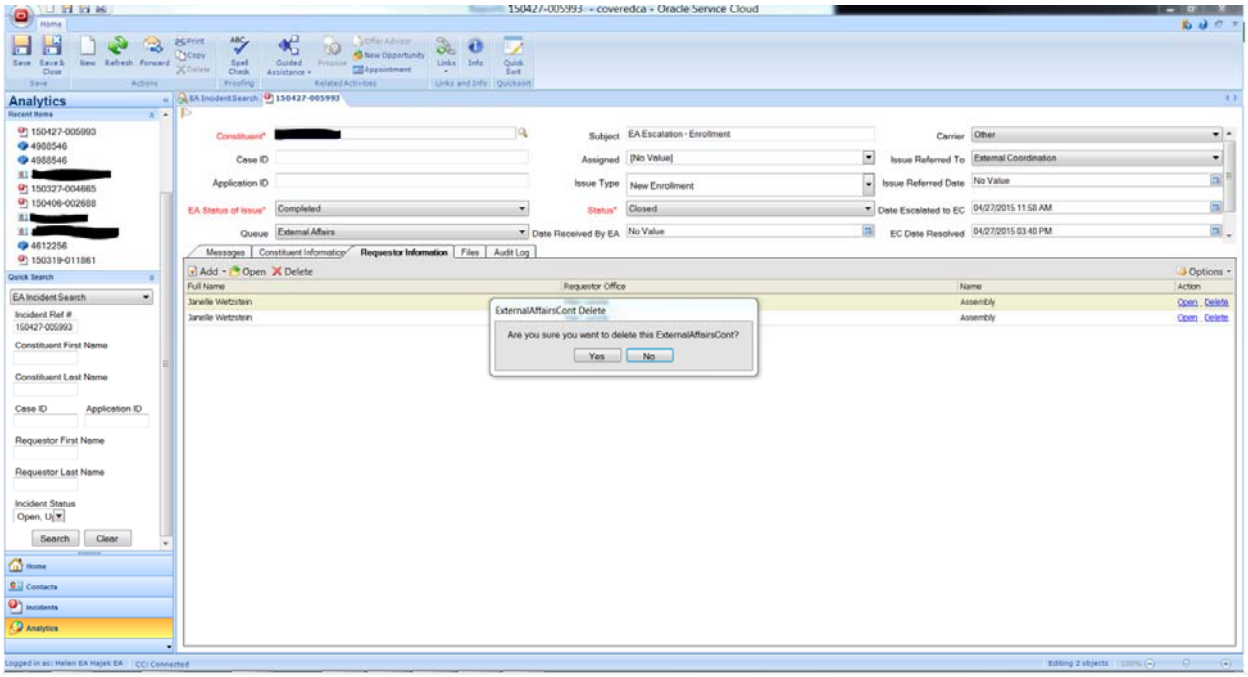
For example – duplicate requestor entry inadvertently added to an EA incident.

1) Click the "delete" button under Options.



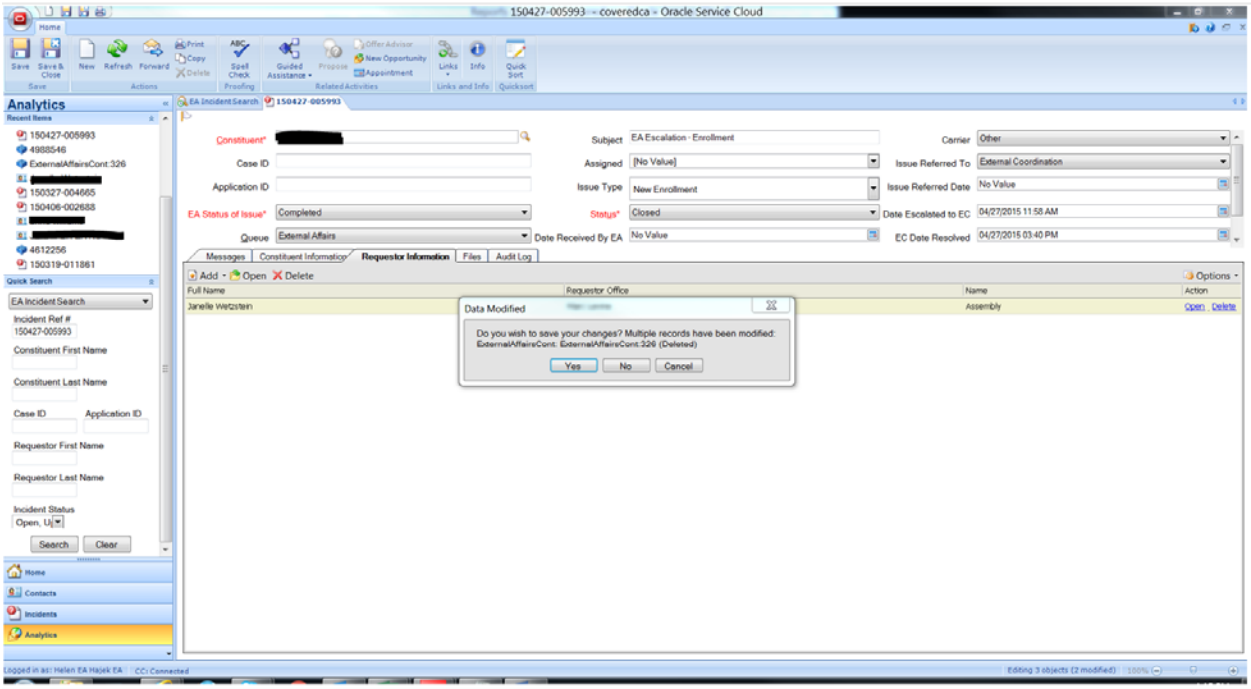
2) Click "Yes" to remove the duplicate requestor entry from the incident.

Note: Clicking "Yes" only remove the relationship between the requestor and the incident.

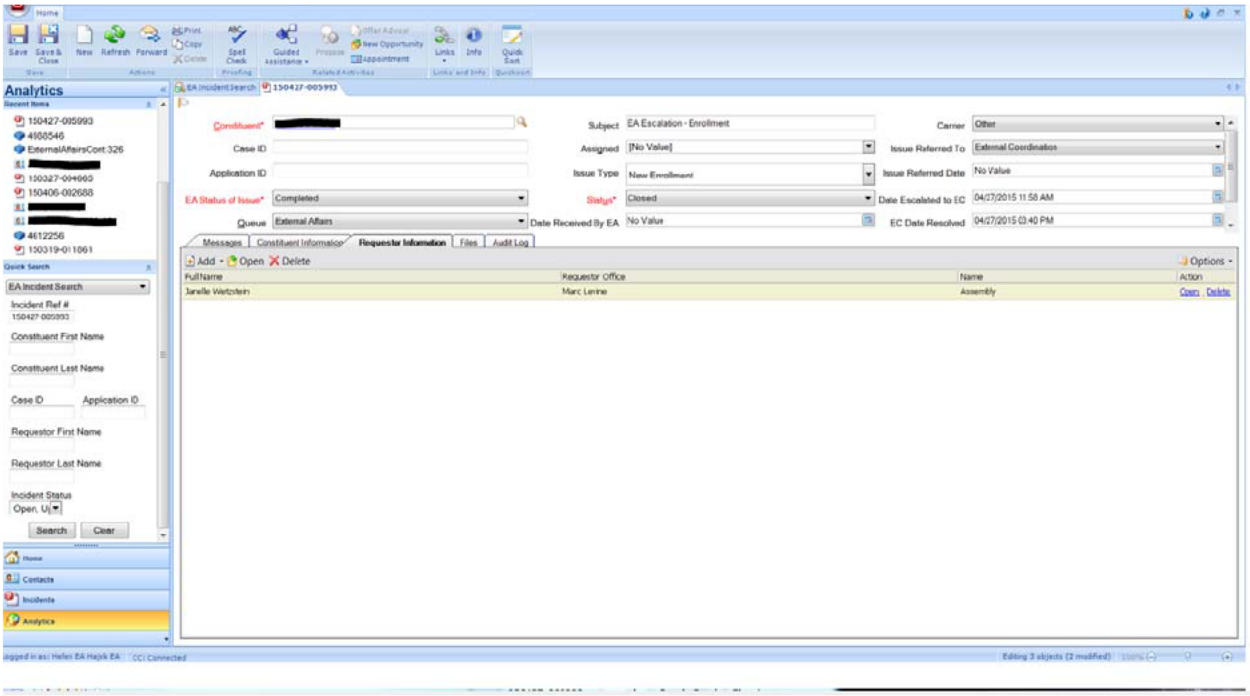


3) Click save and close to save the information

4) Click "Yes" to save the changes.



5) The duplicate entry is now removed.



5 DESIGN ISSUES

The following section includes items that require further clarity in the design of this project.

This does not include all project issues, just items which require resolution for completion of the design of this project.

ID	Description	Date Identified	Assigned To	Status
				TBD

Covered California/CRM

VERSION CONTROL

[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	
[redacted]	[redacted]	[redacted]	
[redacted]	[redacted]	[redacted]	[redacted]
[redacted]	[redacted]	[redacted]	[redacted]

CONTENTS

1 OVERVIEW 4
1.1 Purpose 4
1.2 Intended Audience 4
1.3 Sign Off Approval 4
2 Foundational Workflow 5
3 R&R Appeals 6
3.1 SCR to Appeals Use Case 6
3.1.1 Forwarded from SCR or CRT 6
3.2 Created by R&R Appeals analyst use case 10
3.3 R&R Appeals Profiles 14
3.4 R&R Appeals Navigation Sets 15
3.5 R&R Appeals Staff Accounts 17
3.6 R&R Appeals Workspaces 18
3.6.1 R&R Workspace layouts 18
3.7 R&R Appeals Workspace Rules 28
3.8 R&R Appeals Business Team Dependancies 29
3.9 R&R Special Appeals Reports 29
4 Site-Wide Configuration 30
4.1 Products, Categories and Dispositions 30
4.1.1 Products 30
4.1.2 Categories 31
4.1.3 Dispositions 31
4.1.4 Queues 31
4.1.5 Workflows 31
5 DESIGN ISSUES 31
6 Appendix A – Fields Added/Modified 33
6.1 Incident 33
6.2 Appeal 33
6.3 Contact ..... **Error! Bookmark not defined.**

1 OVERVIEW

1.1 Purpose

The purpose of the Functional Solution Definition document is to define and illustrate the functional requirements that Covered CA – R&R Appeals Oracle Service Cloud should support. The document also serves as a reference and communication guide for the scope and direction of the implementation that is being completed for Covered CA – R&R Appeals. The goal is for both Covered CA – R&R Appeals and CRM Admin team to review and gain agreement on how Administrators, Managers, Analysts, and contacts are going to use the Service Cloud application and to make sure the use cases and requirements are defined up-front so the application can be configured and tested properly.

1.2 Intended Audience

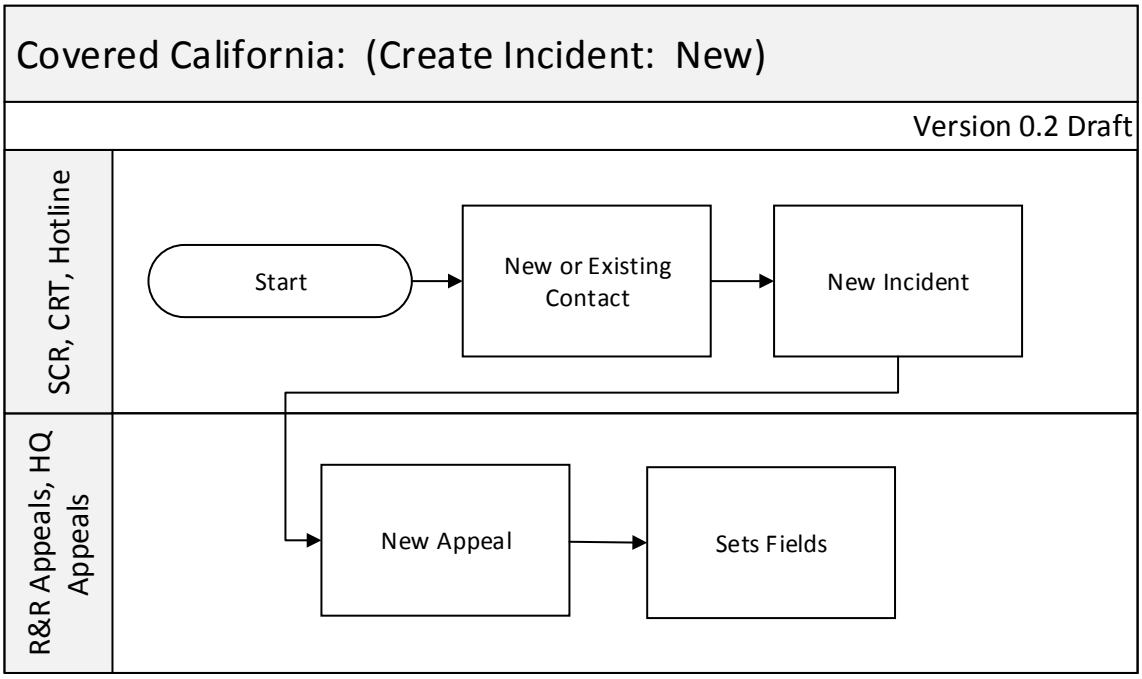
The intended audience for this is the R&R Appeals team and IT CRM Admin team.

1.3 Sign Off Approval

2 FOUNDATIONAL WORKFLOW

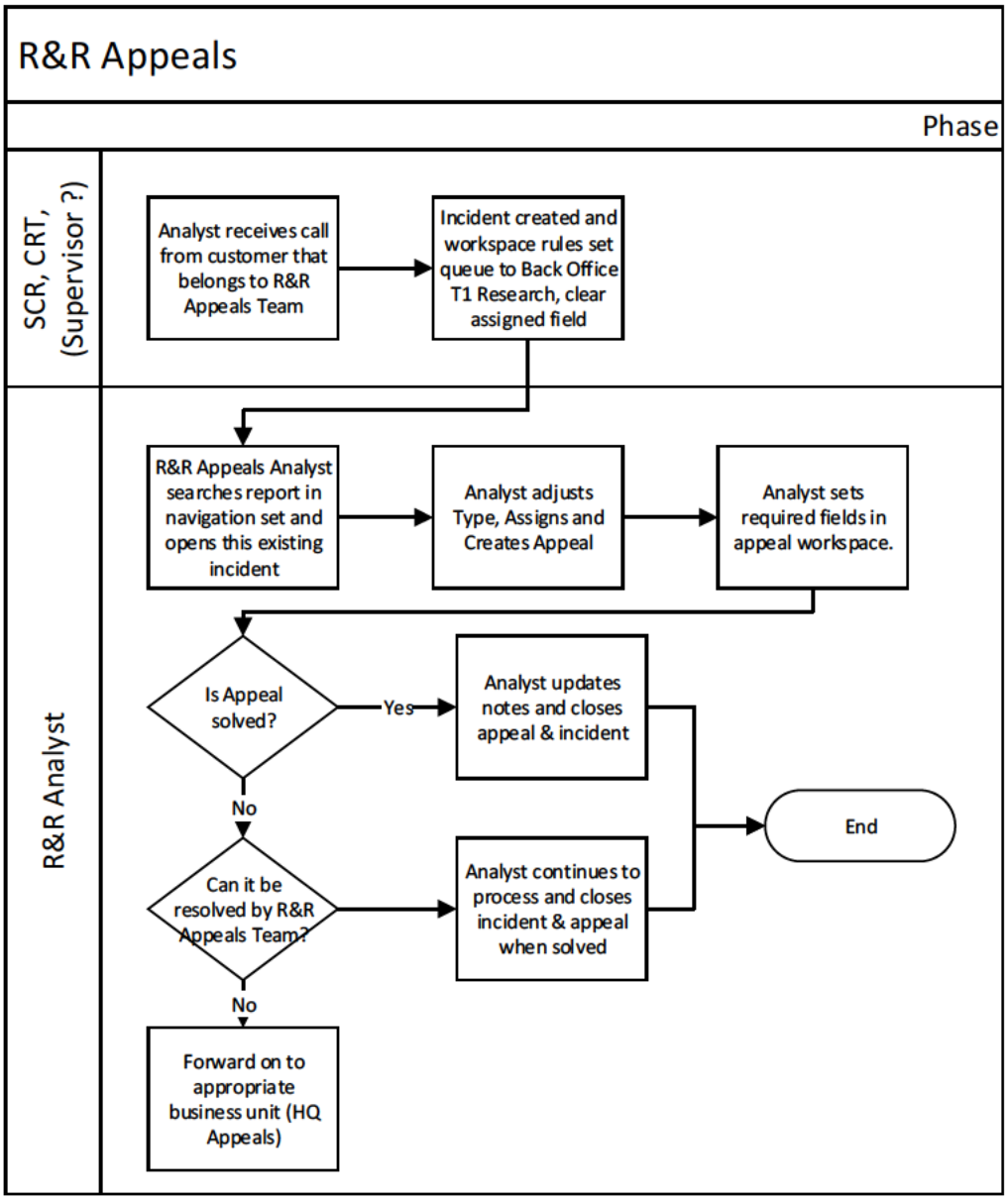
An analyst will create an incident. Depending on the issue, the analyst will either resolve the issue or escalate for additional support within Covered California. The workflow for most business units is as follows:

1. The analyst opens a new incident
2. Workflow forces the analyst to select a contact from the Oracle Service Cloud application (CRM)
3. Once a contact is selected a new incident opens with the contact prepopulated
4. The analyst captures notes, sets a Type and either processes the incident, forwards on the incident to another business unit to either continue processing the incident or opens a new Appeal.
5. The incident follows the Appeal and gets managed through Covered California best business practices



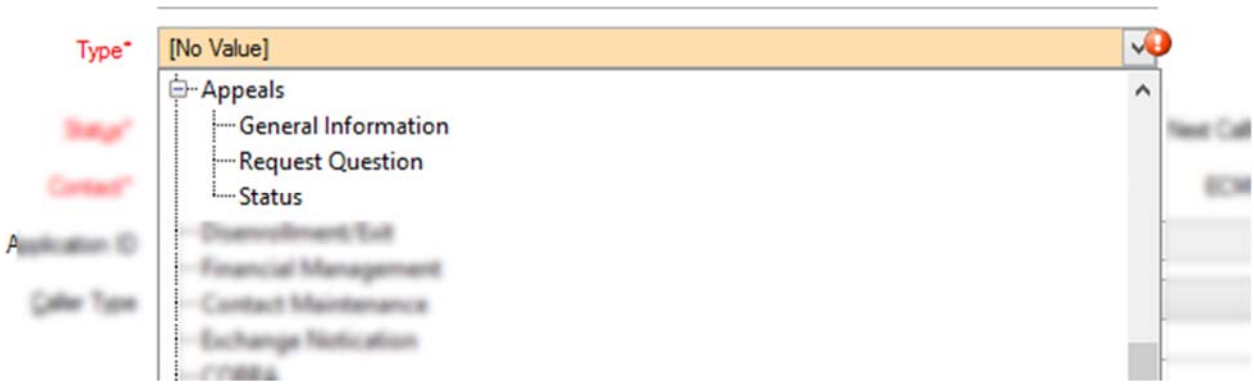
3 R&R APPEALS

3.1 SCR to Appeals Use Case

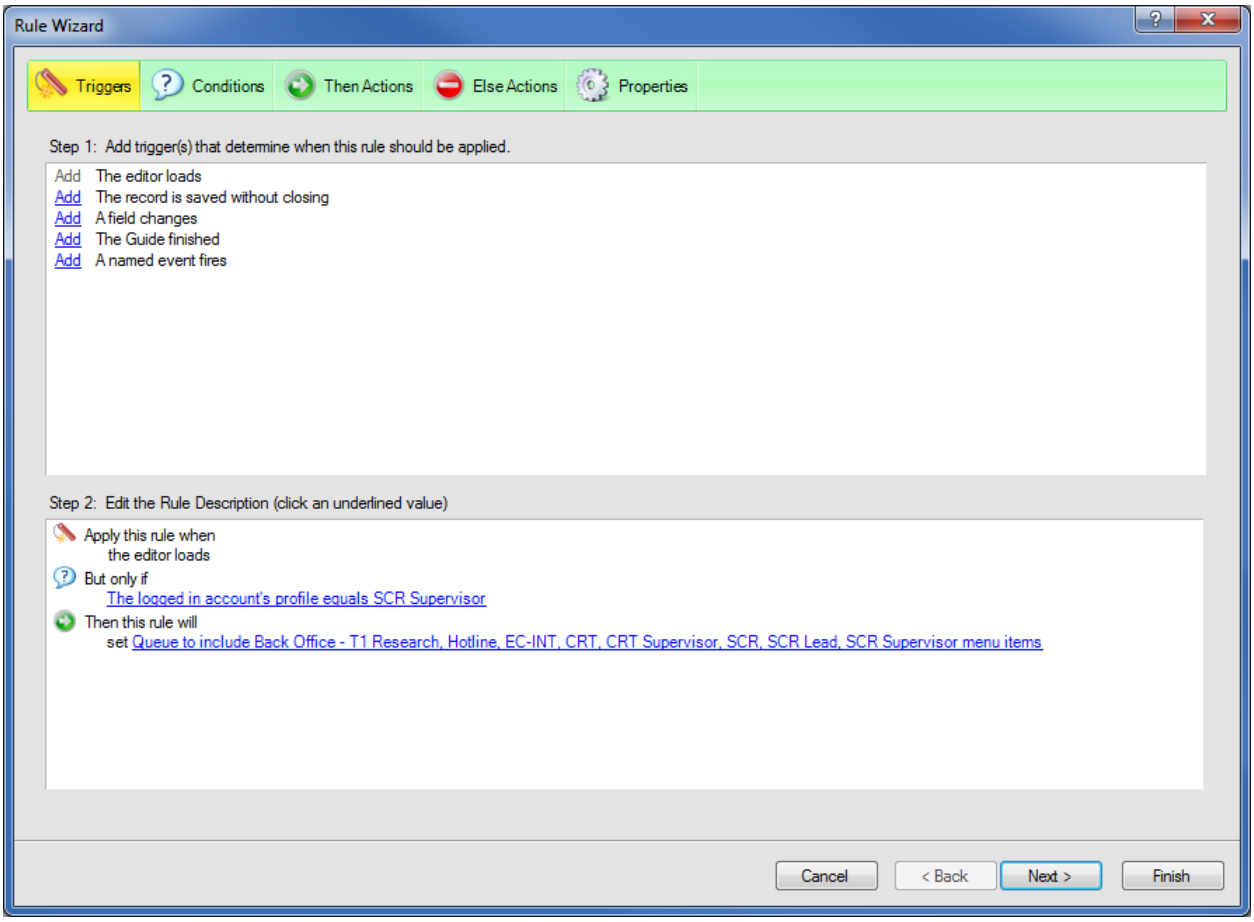


3.1.1 Appeal forwarded from SCR or CRT

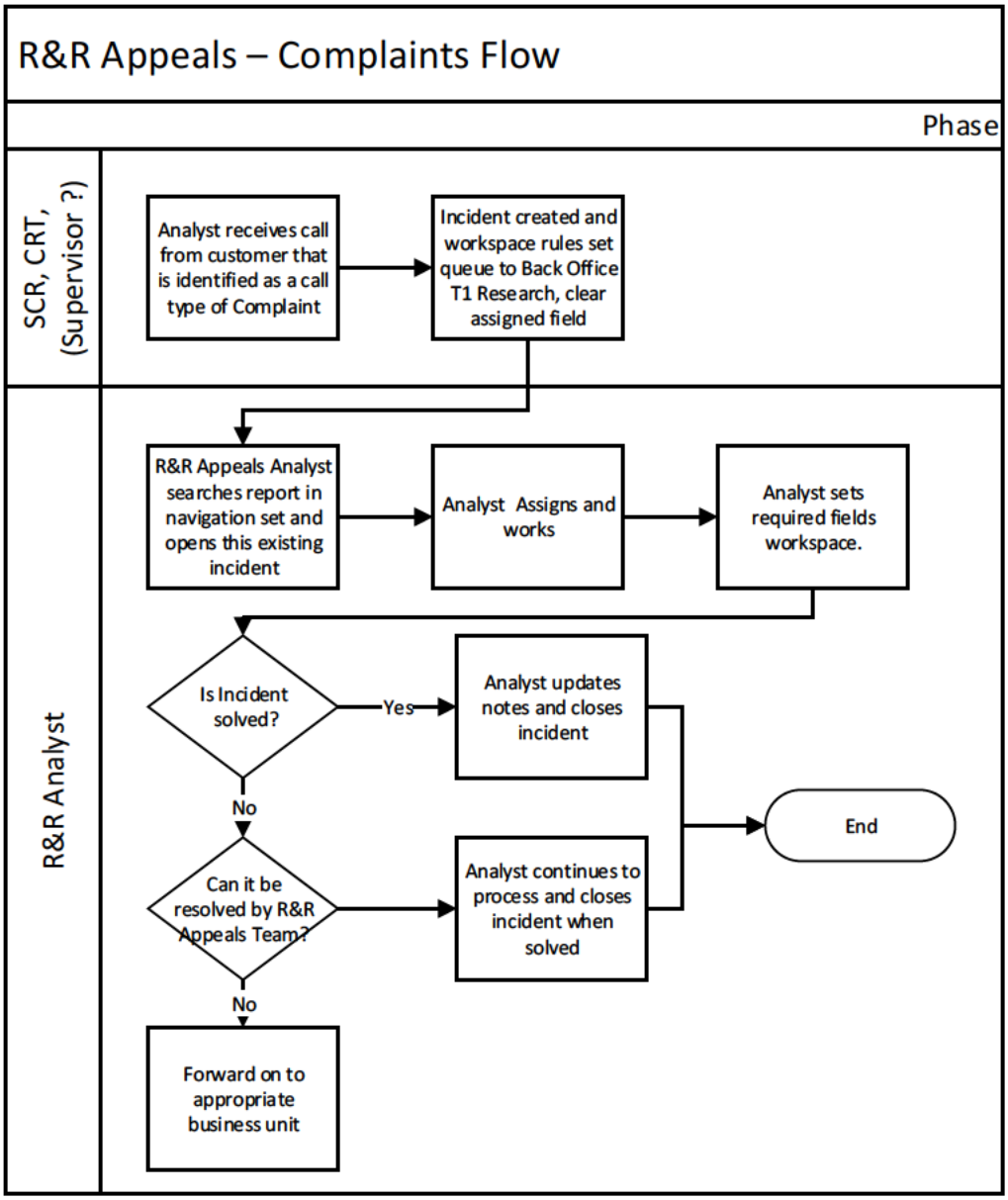
An incident gets created within another Covered California business unit (SCR or CRT)
The analyst sets field Type to Appeals: General Information, Request Question, or Status



Rule added to SCR workspace to allow the SCR Supervisor to set queue to "Back Office T1 research".

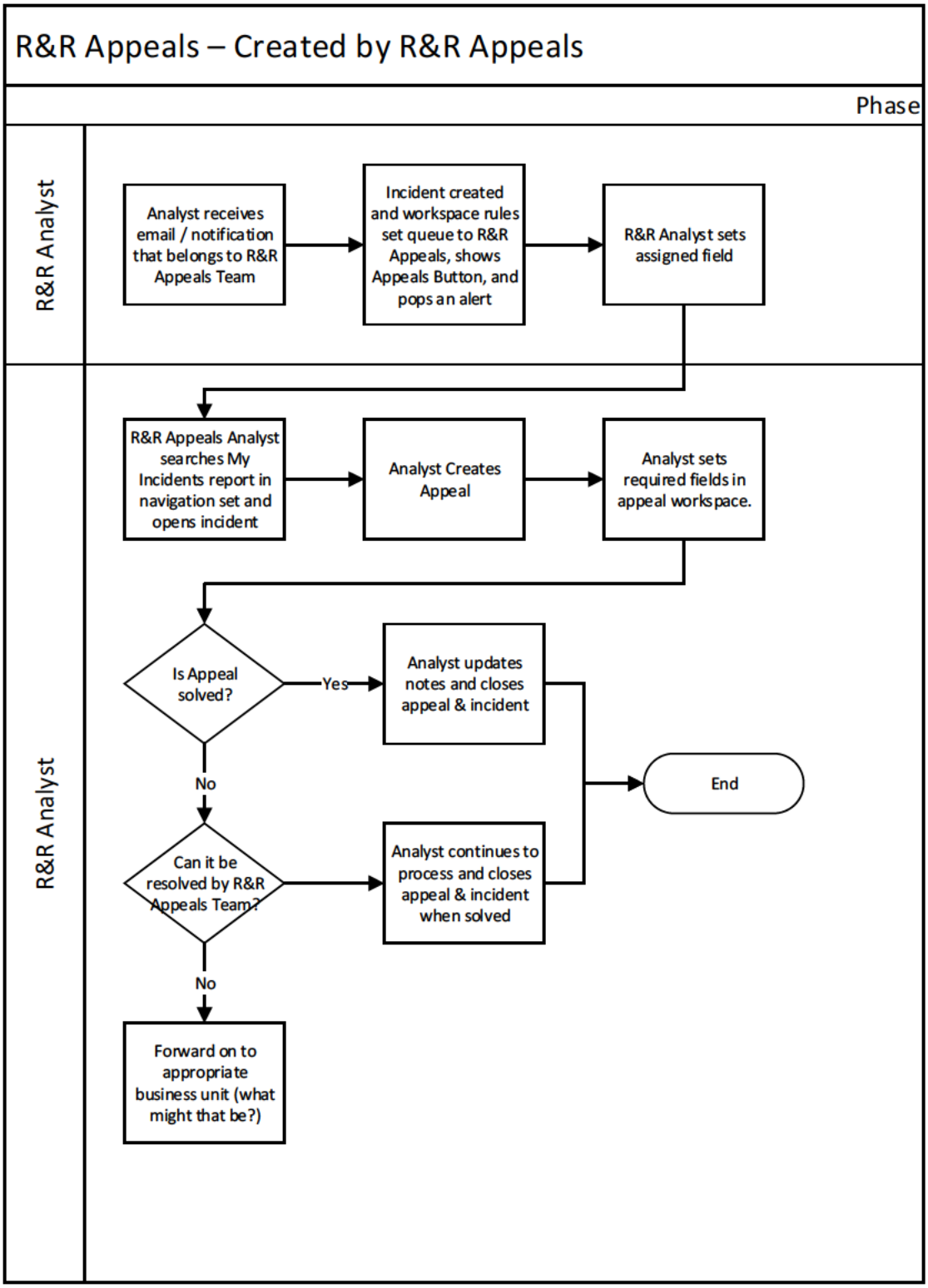


3.1.2 Complaint forwarded from SCR or CRT



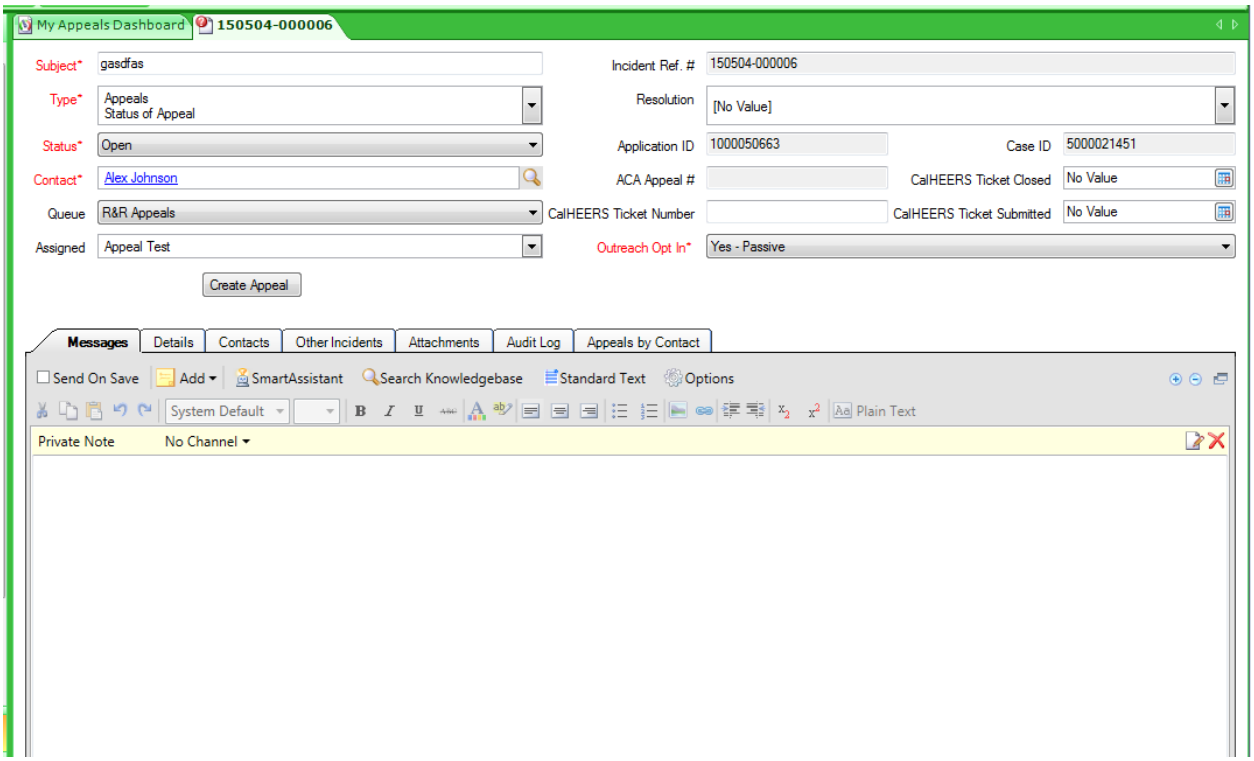
SCR/CRT analyst will enter incident with Appeals option and have to escalate the Incident to the SCR Supervisor. SCR Supervisor will have to determine if the Incident needs to get forwarded to the R&R Appeals group, if so the queue will be set to Back Office T1 research queue owned by R&R Appeals and analyst assigned field set to "no value".

3.2 Incident created by R&R Appeals analyst use case



To create Incident:

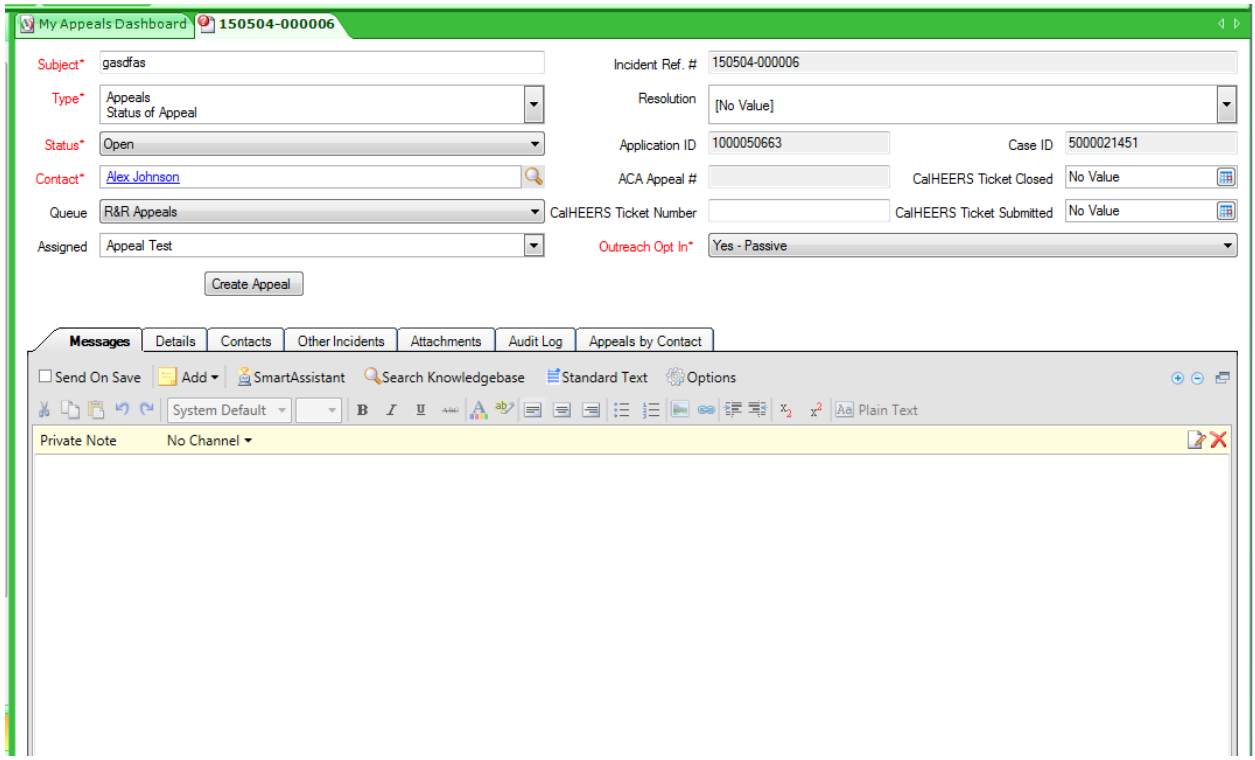
An incident gets created by an R&R Appeals Analyst based on information from DSS, Email, Web Form or Mail/Fax.
The analyst sets field Type to Appeals: General Information, Request Question, or Status



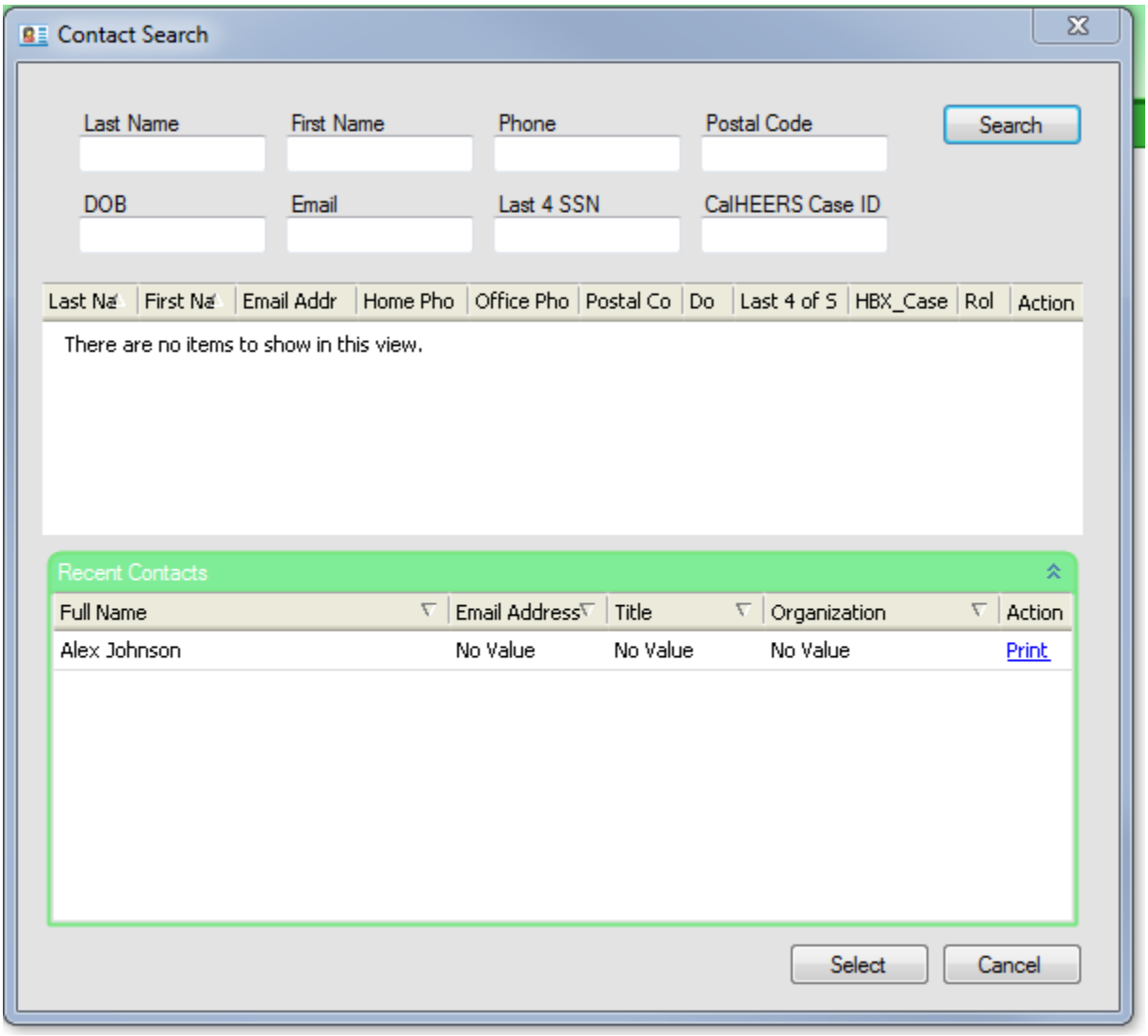
Subject, Type, Status and Outreach Opt In are required for the Appeals incident. When R&R Appeals analyst enters incident with Type from Appeals list, queue will automatically set to R&R Appeals. Save this incident before creating the child Appeal case.

To create Appeal:

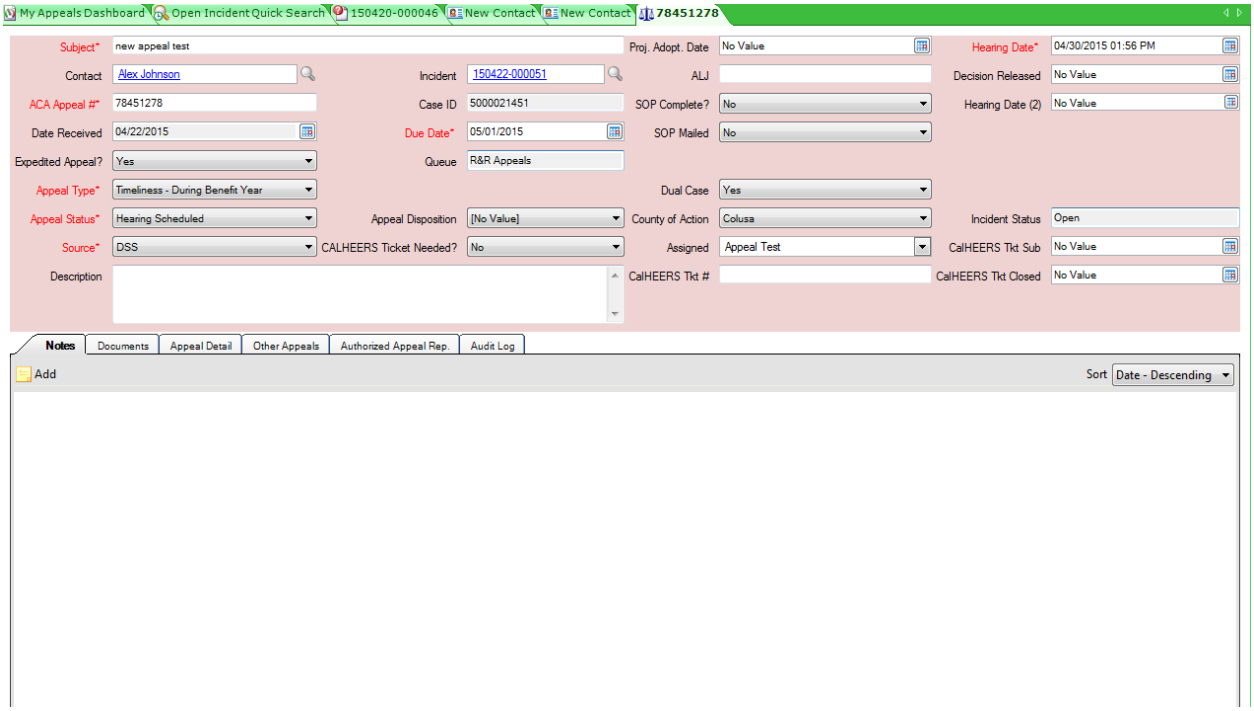
R&R Analyst opens incident from navigation set report or already has open from creation, saves the incident, then creates an Appeal child case by clicking on the appeals button in the incident workspace. When the Create Appeal button is clicked, an external event fires called Appeal. This external event saves and closes the incident workspace and opens a child Appeal workspace.



Contact Search dialog will open and R&R Analyst will have to select the Contact listed in the incident for the Child "Appeal" case.



Child "Appeal" workspace:



R&R Analyst enters required fields and either assigns to another R&R analyst or works Appeal until appeal is either resolved or moved on to a different department (HQ Appeals).

When Appeal resolved closing child "Appeal" will also close the parent "Incident" requiring Appeal resolutions within the "Appeal" workspace.

3.3 R&R Appeals Profiles

R&R Appeals has 2 profiles. Both of them share the same permissions, however the management profile, has additional reporting requirements and utilizes a different navigation set. The two profiles are as follows:

- R&R Appeals
- R&R Appeals_Management

3.4 R&R Appeals Navigation Sets

R&R Appeals:

Application Menu	Home	Incidents	Contacts	Answers	Quick Search	Appeal
New Incident	My Appeals Dashboard (default)	Incidents Search V2	Contacts Search	TBD	Appeal Quick Search	Appeal Search Report
New Contact	.My Incidents 2.0				Contact Quick Search	Analyst: My Open Appeals by Queue, Status or Type
	Notifications				Open Incident Quick Search	Analyst: My Closed Appeals by Disposition, Queue or Type
	ALJ Decision Received				Closed Incident Quick Search	
	My Closed Appeals by Disposition, Queue or Type					
	My Open Appeals by Queue, Status, or Type					
	All Open Appeals by Queue					
	Hearings Report					
	IR Report					
	Unassigned BO T1 Research					
	All BO T1 Research Incidents					

R&R Appeals Management:

Application Menu	Home	Incidents	Contacts	Answers	Quick Search	Appeal
New Incident	R_RAppeals Dashboard	Incidents Search V2	Contacts Search	TBD	Appeal Quick Search	Appeal Search Report
New Contact	.My Inbox 2.3				Contact Quick Search	Analyst: My Open Appeals by Queue, Status or Type
	.My Incidents				Open Incident Quick Search	Analyst: My Closed Appeals by Disposition, Queue or Type
	All Open Appeals by Analyst				Closed Incident Quick Search	
	Open Appeals - Mgmt					
	Open Appeals by Queue					
	All Open Appeals by Queue					
	All Open Appeals by Queue Selectable					
	Open Appeals by Queue HQ					
	Open Appeals with CalHEERs ticket					
	Open Appeals by Status					
	All Open Appeals by					

	Analyst with County					
	Notifications					
	ALJ Decision Received					
	Unassigned Appeals by Queue					
	Unassigned Incidents by Queue or Status					
	All Closed Appeals					
	Appeals by county					
	Hearings Report					
	IR Report					
	All BO T1 Research Incidents					
	Unassigned BO T1 Research					

3.5 R&R Appeals Staff Accounts

Name	Profile
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]

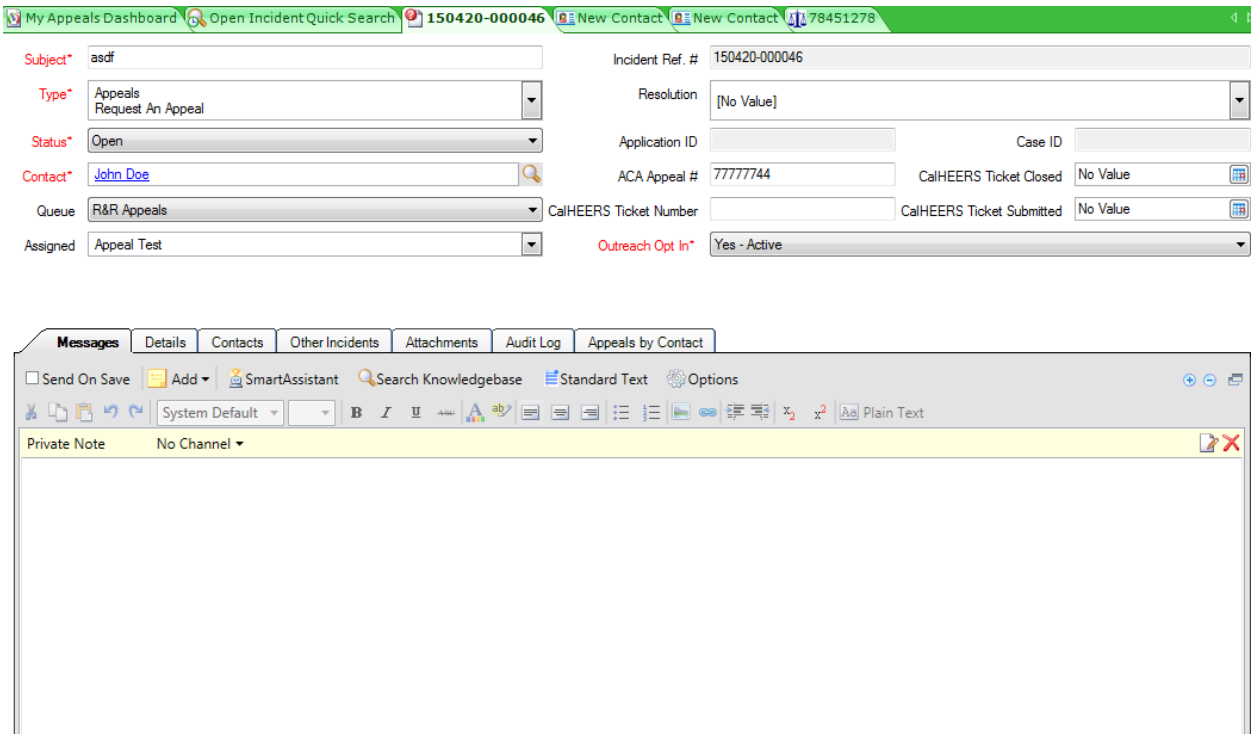
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]

[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]

3.6 R&R Appeals Workspaces

3.6.1 R&R Workspace layouts

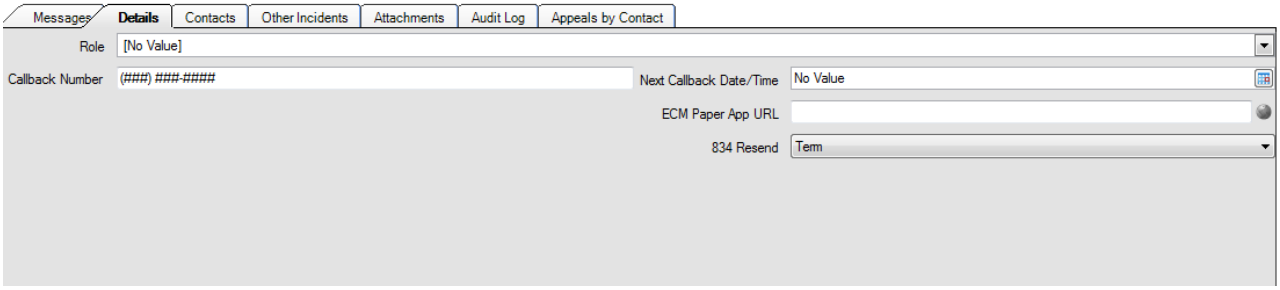
1. Incident – Appeal\Appeal Incident WS



Label	Description	Options	Required	CRM Field	Notes
Subject			yes	Incident.Subject	
Type	Incident Type		yes		
Status	Incident Status		yes		
Contact	Appeal claimant		yes		
Queue	Queue incident/appeal assigned		no		
Assigned	Analyst Assigned to incident		no		
Incident Ref. #	Incident ID		no		Will populate automatically when incident created
Resolution			no		
Application ID			no		
Case ID			no		
ACA Appeal #	7 characters, numeric only		no		
CalHEERS Ticket Closed	Date CalHEERs tkt closed		no		
CalHEERS Ticket Number			no		
Cal HEERS Ticket Submitted	Date CalHEERs tkt submitted		no		
Outreach Opt In			yes		

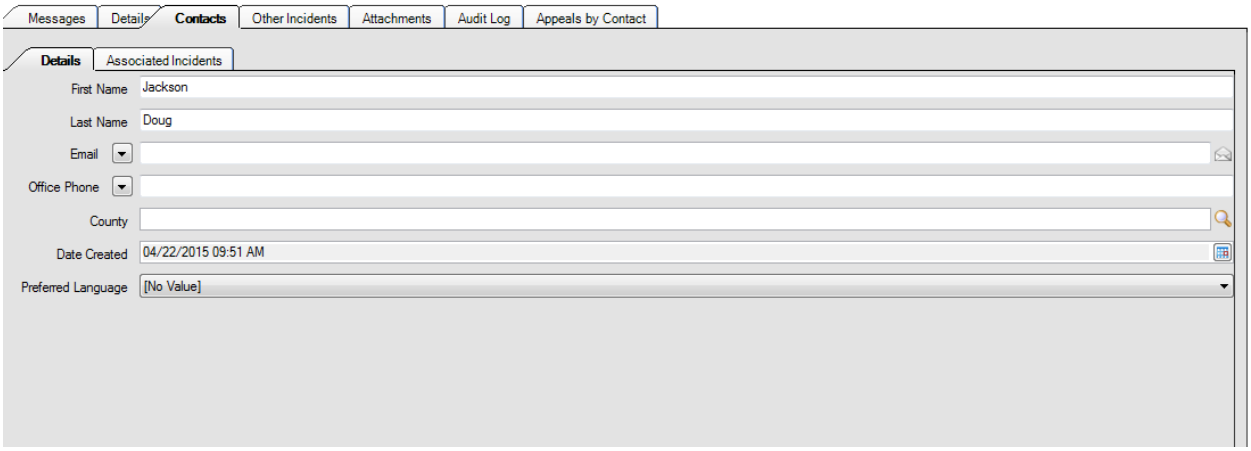
Additional Incident tabs:

Details



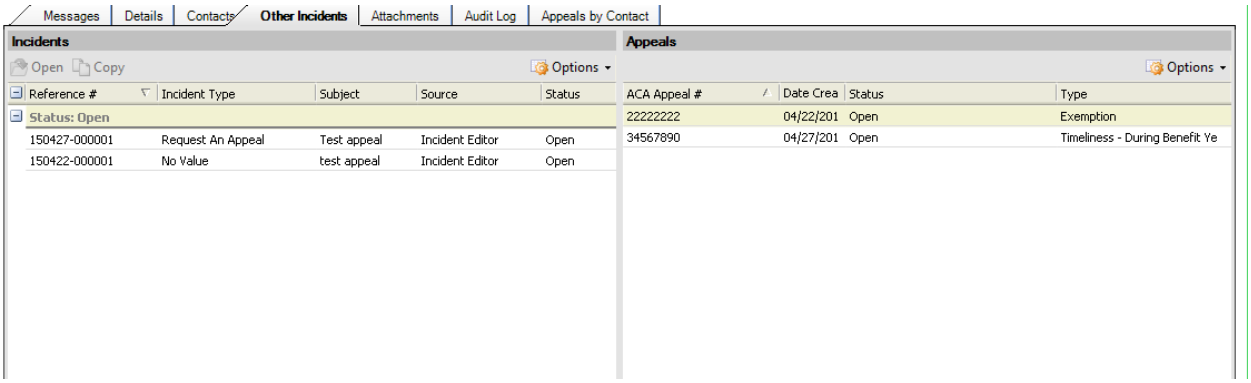
Label	Description	Options	Required	CRM Field	Notes
Role	Contacts Role	- Individual - SHOP - CEC - Other			
Callback Number	Contact callback number additional				
Next Callback Date/Time	Time field if needed to manage customer contact				
ECM Paper App URL	URL for link to scanned docs from Novatext				
834 resend	Available to use if 834 resend tracking needed				

Contacts:

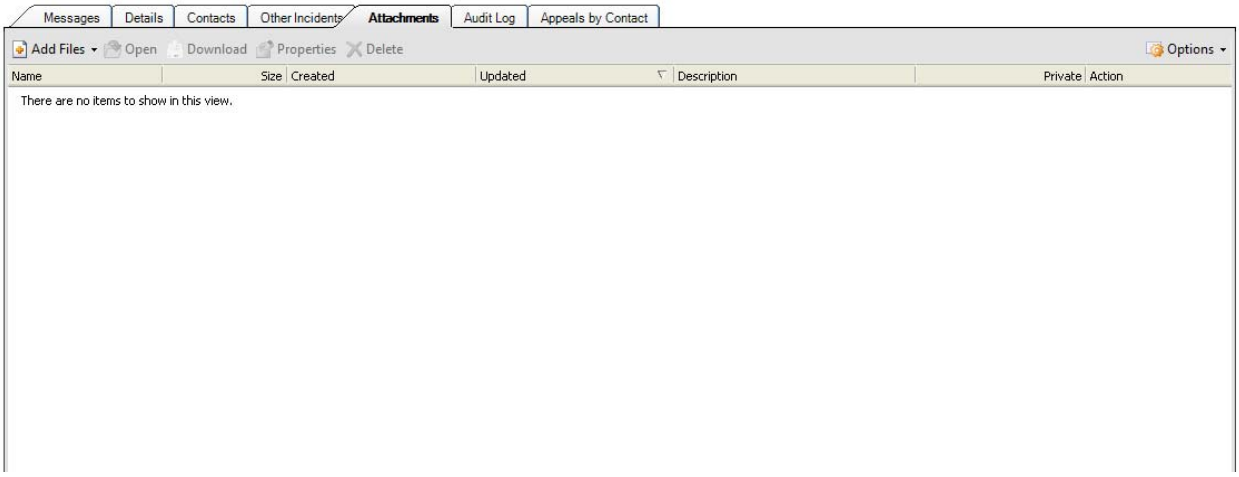


Label	Description	Options	Required	CRM Field	Notes
First Name	Contact First Name				
Last Name	Contact Last Name				
Email	Contact email				
Phone		- office - mobile - fax - assistant - home			
County	Contacts county of residence	All CA counties			
Date Created	Date contact entry created				
Preferred Language	Contact preferred language				

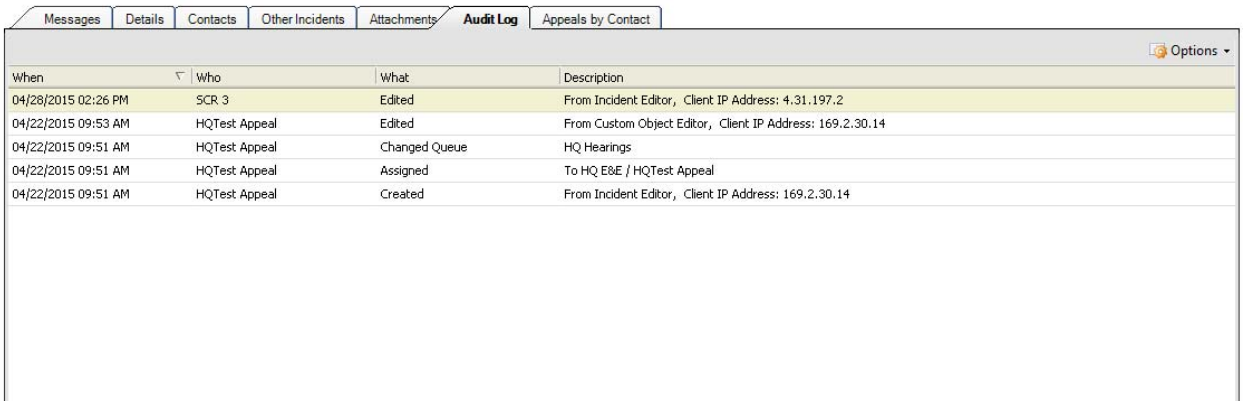
Other Incidents:



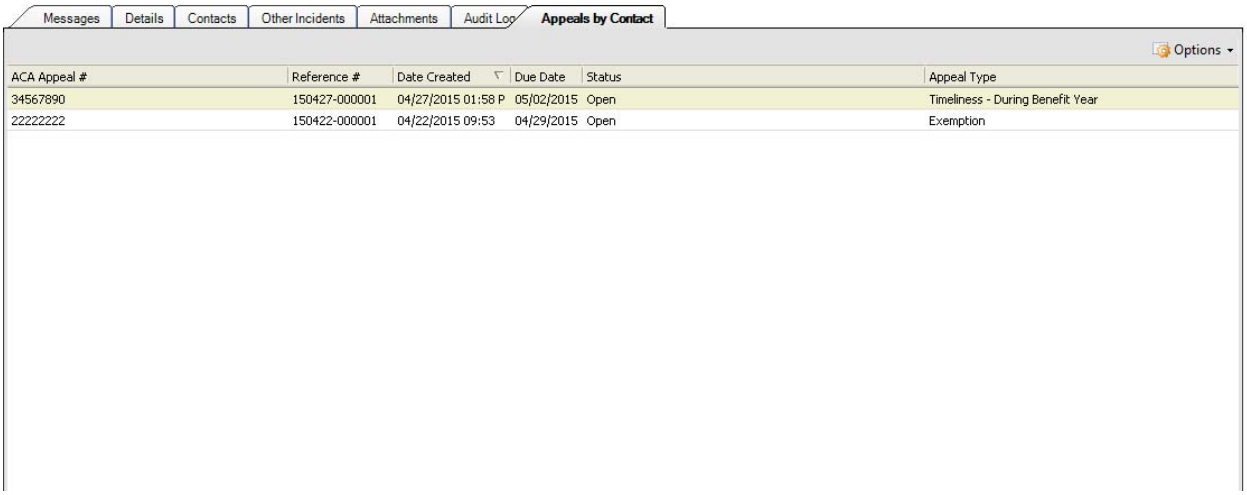
Attachments:



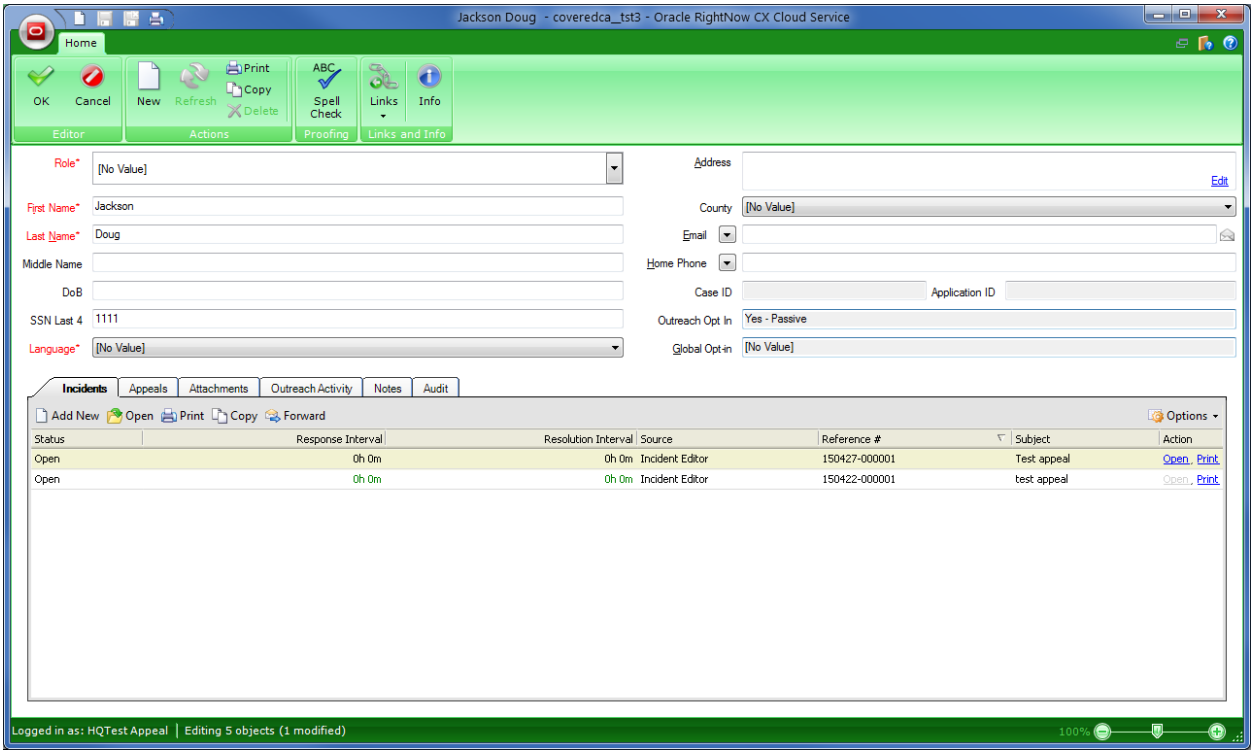
Audit Log:



Appeals by Contact:



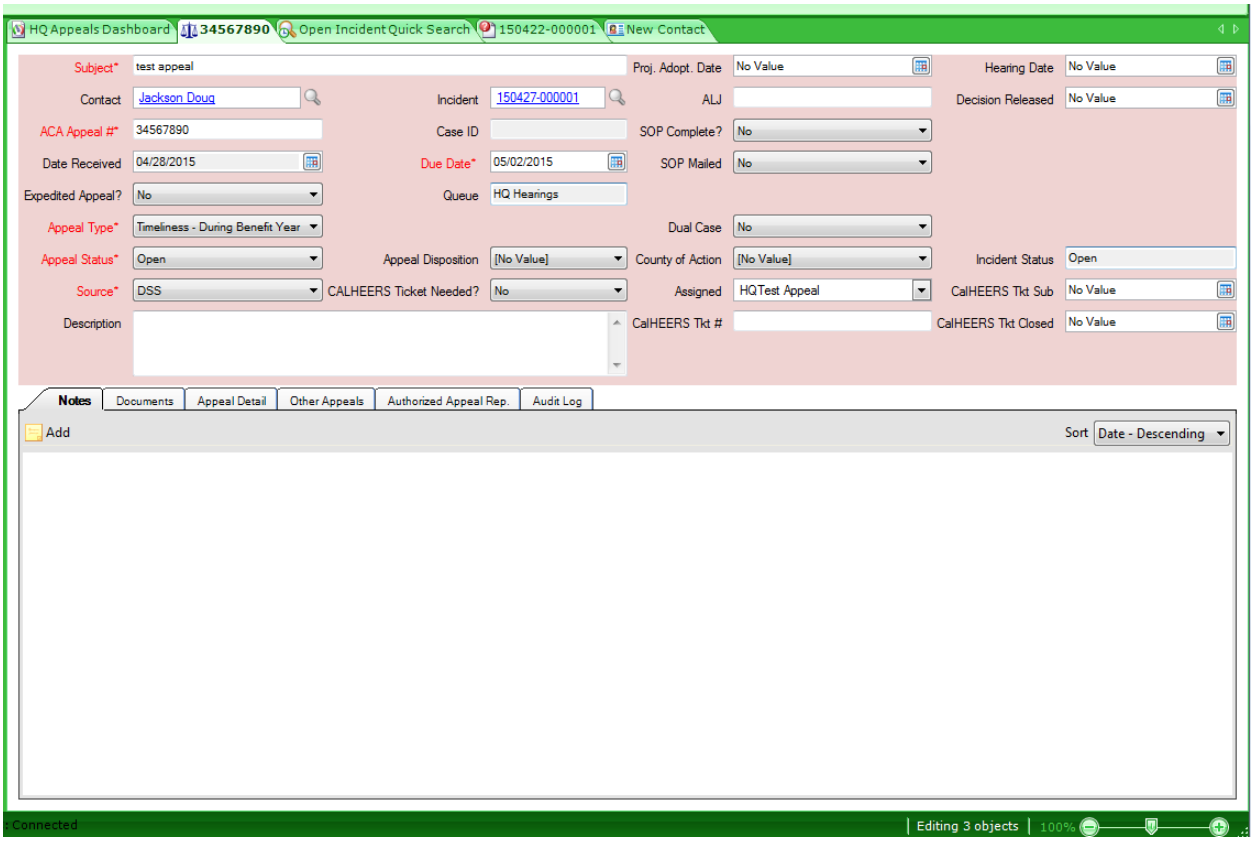
2. Contact - Appeal\Appeal Contact



Label	Description	Options	Required	CRM Field	Notes
Role		- Individual - Health Plan	Yes		

		- Agent - Authorized Rep			
First Name	First Name		Yes		
Last Name	Last Name		Yes		
Middle Name	Middle Name				
DoB	Date of Birth				
SSN Last 4	Contact last 4 SSN				
Language	Preferred Language		Yes		
Address	Residence Address				
County	Residence County				
Email	Email				
Home Phone	Phone	- Office - Mobile - Fax - Assistant - Home			
Case ID	CalHEERs Case ID				
Application ID	CalHEERs Application ID				
Outreach Opt In	Does Contact want unsolicited communications from CoveredCA		Yes		
Global Opt-In					

3. Appeals – Appeal WS \Workspaces and Workflows\Appeals



Label	Description	Options	Required	CRM Field	Notes
Subject	Short Desc of issue		yes	Incident.Subject	
Contact					
ACA Appeal #	DSS provided ACA #		yes		
Date Received	ACA File Date				
Expedited Appeal?	Expedited Y/N	- Yes - No			
Appeal Type		- Eligibility Initial - Eligibility During Benefit Year - Elegibility APTC/CSR - Elegibility Annual Redeterminations - Timeliness Initial - Timeliness During Benfit Year	yes		

		- Timeliness Annual Redetermination - Exemption - Termination - Denial of Request to Vacate Dismiss - Other			
Appeal Status		- Open - Closed - Forwarded to HQ - Hearing Scheduled - Waiting on ALJ Decision - Conditional Withdrawal - ALJ Decision Received WIP - Continued - Postponed - Pending Dismissal	yes		
Source		- DSS - Email - Webform - Mail/Fax/Other	yes		
Description	Short Desc of Appeal				
Incident	Incident # assoc with Appeal				
Case ID	CalHEERs Case ID				
Due Date			yes		
Queue					
Appeal Disposition		- Conditional Withdrawal - Unconditional Withdrawal - NonAppearance - Decision Grant - Decision Grant - Decision Denied - Decision Grant in Part - Hearing Dismissed - Administrative Dismissal - IR Conditional Withdrawal - IR Uncondiational Withdrawal			

		- IR Administrative Withdrawal			
CalHEERS Ticket Needed?		- Yes - No			
Proj Adopt Date	ALJ decision expected to be received by this date				Field on ACA Case form
ALJ	Hearing Judge				
SOP Complete?		- Yes - No			
SOP Mailed		- Yes - No			
SOP Sent Date	Date SOP sent to Judge/Consumer				Does not appear unless SOP Mailed is "Yes"
Dual Case		- Yes - No			
County of Action	Hearing County	(all CA counties)			Required if Dual Case is "Yes"
Assigned	Analyst Assigned				
CalHEERs Ticket #	CalHEERs ESS tkt				Required if field CalHEERS tkt required is "Yes"
Decision Released	Date decision provided by Judge				
Hearing Date					
Incident Status					
CalHEERS Tkt Sub	Date calHEERS tkt submitted				
CalHEERs Tkt Closed	Date calHEERS tkt closed				

3.7 R&R Appeals Workspace Rules

[redacted]

3.8 R&R Appeals Business Team Dependancies

Incidents come from DSS or possibly SCR/CRT/Hotline.

3.9 R&R Special Appeals Reports

R&R Analysts

1. .My Inbox 2.4 – My Appeals Dashboard
2. Pending Dismissal – My Appeals Dashboard
3. My Appeal Detail – My Appeals Dashboard
4. Unassigned BO T1 Research – My Appeals Dashboard
5. .My Inbox 2.3
6. .My Incidents
7. Notifications
8. ALJ Decision Received
9. My Closed Apepals by Disposition, Queue, or Type
10. My Open Appeals by Queue, Status, or Type
11. All Open Appeals by Queue
12. Hearings Report
13. IR Report
14. Unassigned BO T1 Research
15. All BO T1 Research Incidents

R&R Mgmt

1. Open Appeals – Mgmt (R_R Appeals Mgmt Dashboard)
2. All Open Appeals by Analyst (R_R Appeals Mgmt Dashboard)
3. All Closed Appeals (R_R Appeals Mgmt Dashboard)
4. .My Inbox 2.3
5. .My Incidents
6. All Open Appeals by Analyst
7. Open Appeals – Mgmt
8. Open Appeals by Queue
9. All Open Appeals by Queue
10. All Open Appeals by Queue selectable
11. Open Appeals by Queue HQ
12. Open Appeals with CalHEERs ticket
13. Open Appeals by Status
14. All open Appeals by Analyst with county

15. Notifications
16. ALJ Decision Received
17. Unassigned Appeals by queue
18. Unassigned Incidents by Queue or Status
19. All Closed Appeals
20. Appeals by County
21. Hearings Report
22. IR Report
23. All BO T1 Research Incidents
24. Unassigned BO T1 Research

Incident Workspace reports:

1. Contact - Appeals\Contact Search - Appeal
2. Other Incidents (Incidents) - .CalHEERS\Individual\Workspace Reports\Incident WS\Incidents by Contact Other Inc tab WS – Individual
3. Other Incidents (Appeals) – Public Reports\MEdit\Appeals\Appeals by Contact (For NON-APPEALS WS)
4. Appeals by Contact – Public Reports\MEdit\Appeals\Appeals by Contact with Incident id (For NON-APPEALS WS)

Appeals Workspace reports:

1. Other Appeals – Public Reports\MEdit\Appeals\Appeal by Contact (Appeal WS-kwh)
2. Audit Log – Appeals\Appeals Audit log

4 SITE-WIDE CONFIGURATION

4.1 Products, Categories and Dispositions

Add products and categories for grouping incidents, resulting in more accurate search results for staff members and customers. Use dispositions as a way to record the final resolution of a solved incident.

4.1.1 Products

- None added for Appeals

4.1.2 Categories

- None added for Appeals

4.1.3 Dispositions

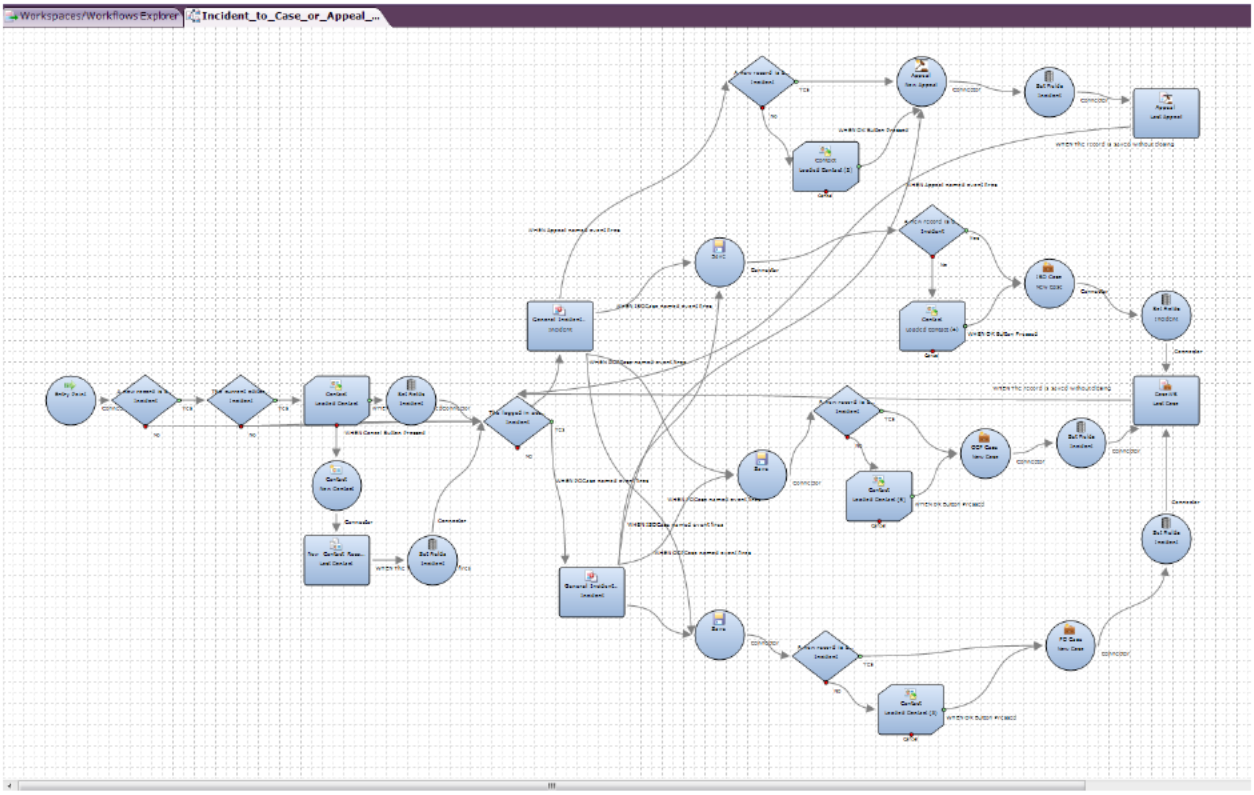
- None added for Appeals

4.1.4 Queues

- R&R Appeals
- HQ (HQ Appeals)

4.1.5 Workflows

- Incident to Case or Appeal_ktesting



5 DESIGN ISSUES

The following section includes items that require further clarity in the design of this project. This does not include all project issues, just items which require resolution for completion of the design of this project.

ID	Description	Date Identified	Assigned To	Status
	Specific report requirement for Mgmt	3/17/2015		

6 APPENDIX A – FIELDS ADDED/MODIFIED

6.1 Incident

Custom Fields

- RR BOT1R queue to Appeal Date (Date/Time incident transitions from BOT1 research queue to R&R Appeals queue)

6.2 Appeal

Custom Fields

- RR to HQ Escalated Date (Date/Time that incident transitions from R&R Appeals to HQ queue)
- RR HQ Resolved Date (Date/Time HQ resolves appeal)
- RR Resolved Date (Date/Time R&R Appeals analyst resolves appeal)

Covered California/CRM

Appeals 12629

VERSION CONTROL

Version	Change Description	Modified By	Date
1.0	Initial Draft	[redacted]	11/30/2015
1.1			
1.2			
1.3			

CONTENTS

1 OVERVIEW 4
1.1 Purpose 4
1.2 Intended Audience 4
1.3 Sign Off Approval 4
2 Foundational Workflow 5
3 R&R Appeals 6
3.1 SCR to Appeals Use Case 6
3.1.1 Forwarded from SCR or CRT ..... **Error! Bookmark not defined.**
3.2 Created by R&R Appeals analyst use case 6
3.3 R&R Appeals Profiles 8
3.4 R&R Appeals Navigation Sets ..... **Error! Bookmark not defined.**
3.5 R&R Appeals Staff Accounts ..... **Error! Bookmark not defined.**
3.6 R&R Appeals Workspaces 8
3.6.1 R&R Workspace layouts 8
3.7 R&R Appeals Workspace Rules 14
3.8 R&R Appeals Business Team Dependancies ..... **Error! Bookmark not defined.**
3.9 R&R Special Appeals Reports 16
4 Site-Wide Configuration 17
4.1 Products, Categories and Dispositions 17
4.1.1 Products 17
4.1.2 Categories 17
4.1.3 Dispositions 17
4.1.4 Queues 17
4.1.5 Workflows 17
5 DESIGN ISSUES 17
6 Appendix A – Fields Added/Modified 18
6.1 Incident 18
6.2 Appeal 18
6.3 Contact ..... **Error! Bookmark not defined.**

1 OVERVIEW

1.1 Purpose

The purpose of the Functional Solution Definition document is to define and illustrate the functional requirements that Covered CA – R&R Appeals Oracle Service Cloud should support with regards to the recent change request Ticket 12629. The document also serves as a reference and communication guide for the scope and direction of the implementation that is being completed for Covered CA – R&R/HQ Appeals. The goal is for both Covered CA – R&R/HQ Appeals and CRM Admin team to review and gain agreement on how Administrators, Managers, Analysts, and contacts are going to use the Service Cloud application and to make sure the use cases and requirements are defined up-front so the application can be configured and tested properly.

1.2 Intended Audience

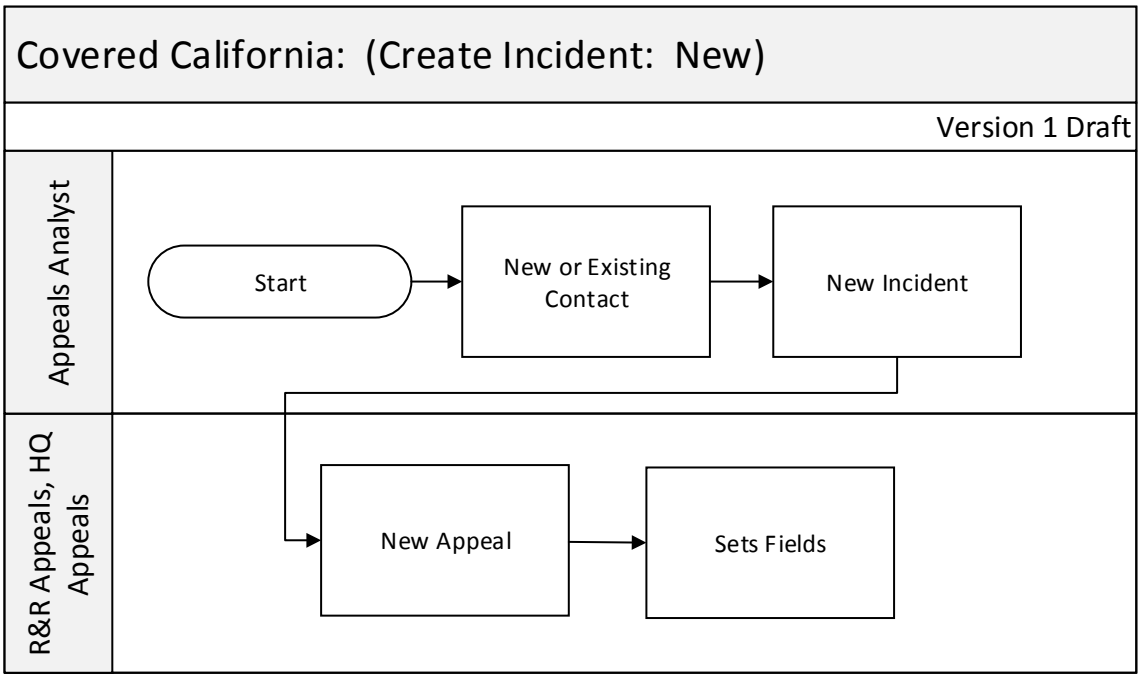
The intended audience for this is the R&R/HQ Appeals team and IT CRM Admin team.

1.3 Sign Off Approval

2 FOUNDATIONAL WORKFLOW

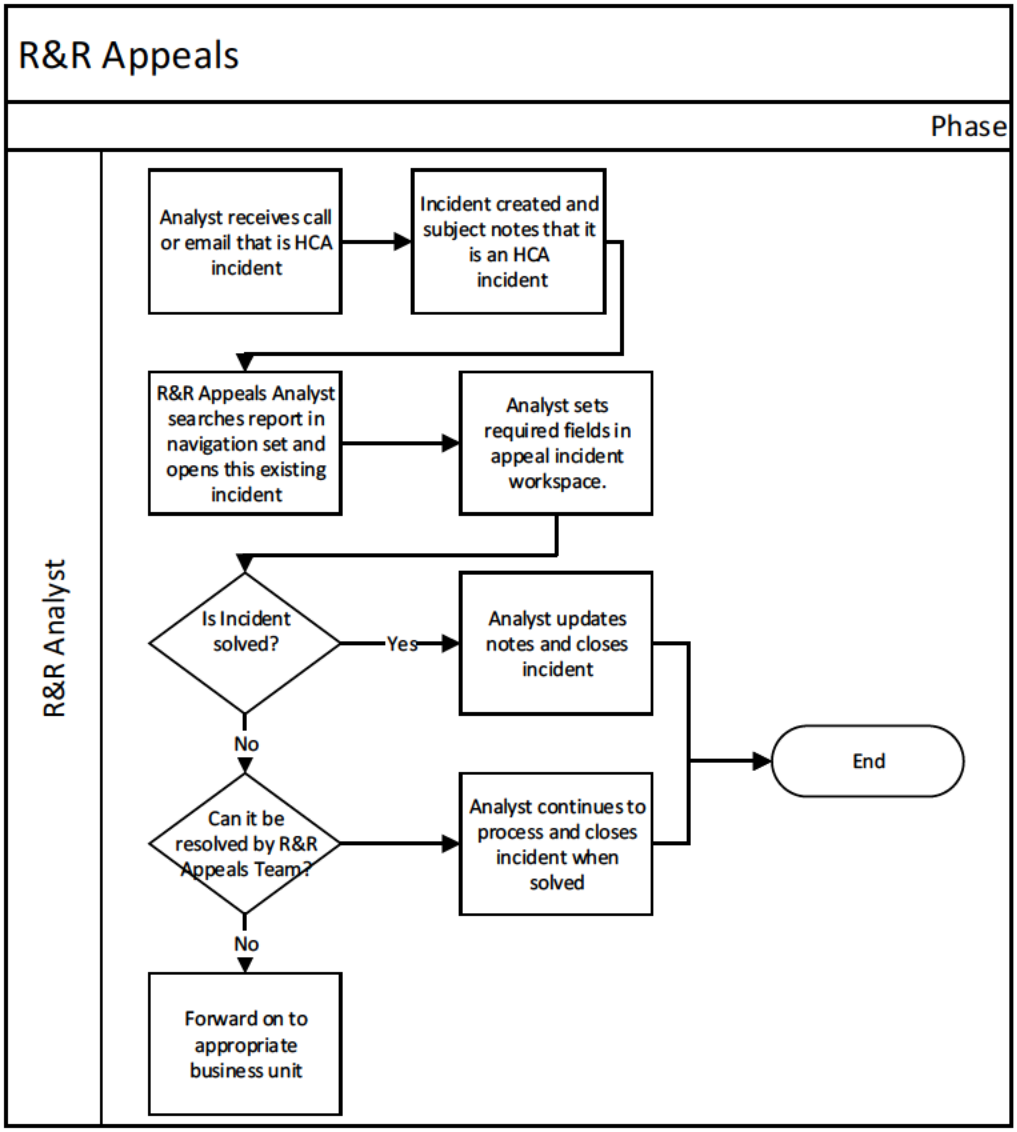
An Appeals analyst will create an incident. Depending on the issue, the analyst will either resolve the issue or escalate for additional support within the Appeals group of Covered California. The workflow for most business units is as follows:

1. The analyst opens a new incident
2. Workflow forces the analyst to select a contact from the Oracle Service Cloud application (CRM)
3. Once a contact is selected a new incident opens with the contact prepopulated
4. The analyst captures notes, sets a Type and either processes the incident, forwards on the incident to another business unit to either continue processing the incident or opens a new Appeal.
5. The incident follows the Appeal and gets managed through Covered California best business practices



3 APPEALS ANALYST

3.1 Appeals Use Case HCA type

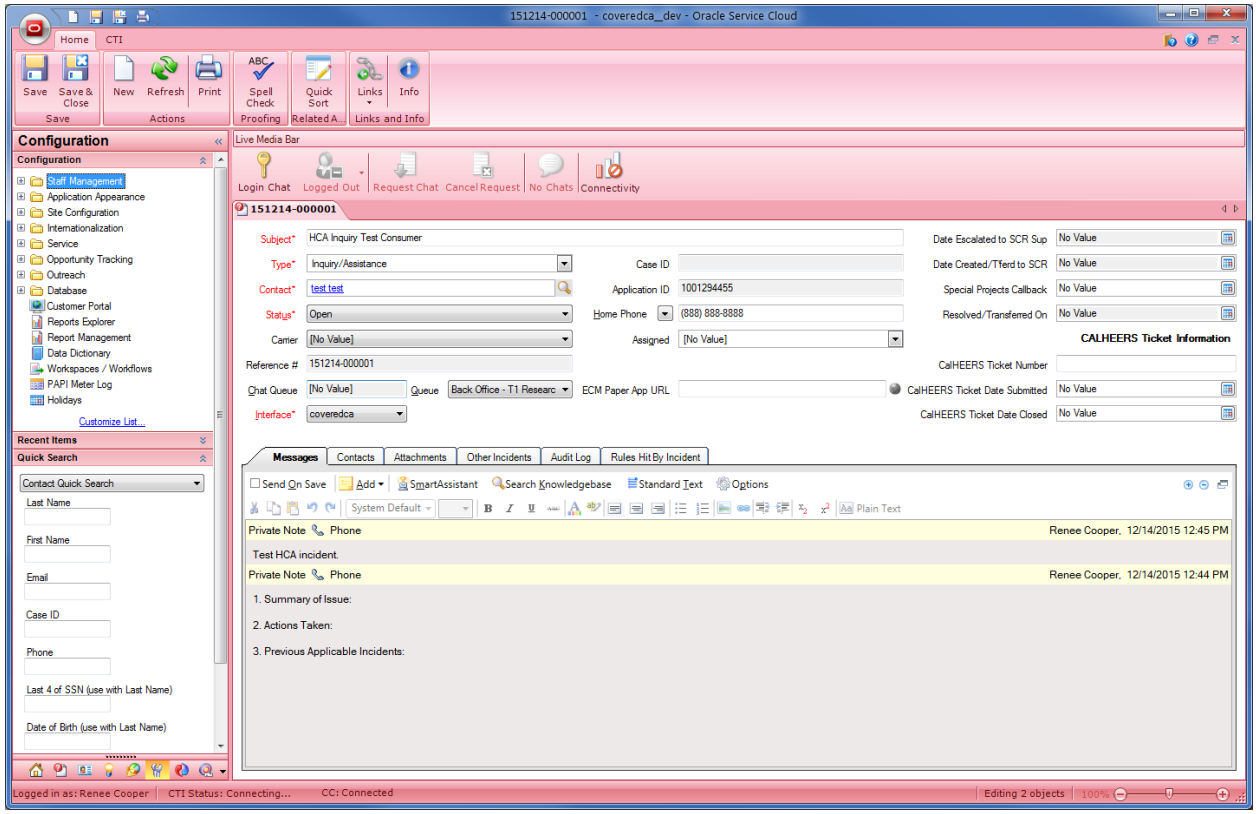


To create Incident:

Analyst selects red button in upper left corner of application and selects new incident or does a search on contact and if no current incident found can create incident by selecting add new from incident tab.

To create Incident:

An incident gets created by an R&R Appeals Analyst based on HCA information provided. The analyst sets field Type appropriate category. Queue will be set to BO – T1 research (this is the only type of incident that should be used for this queue.



Subject, Type, Status and Outreach Opt In are required for the Appeals incident.

3.2 R&R Appeals Profiles

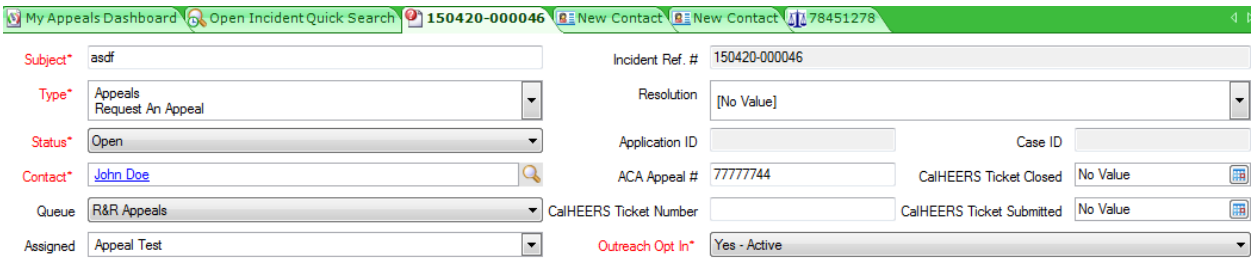
R&R Appeals has 2 profiles. Both of them share the same permissions, however the management profile, has additional reporting requirements and uses a different navigation set. The two profiles are as follows:

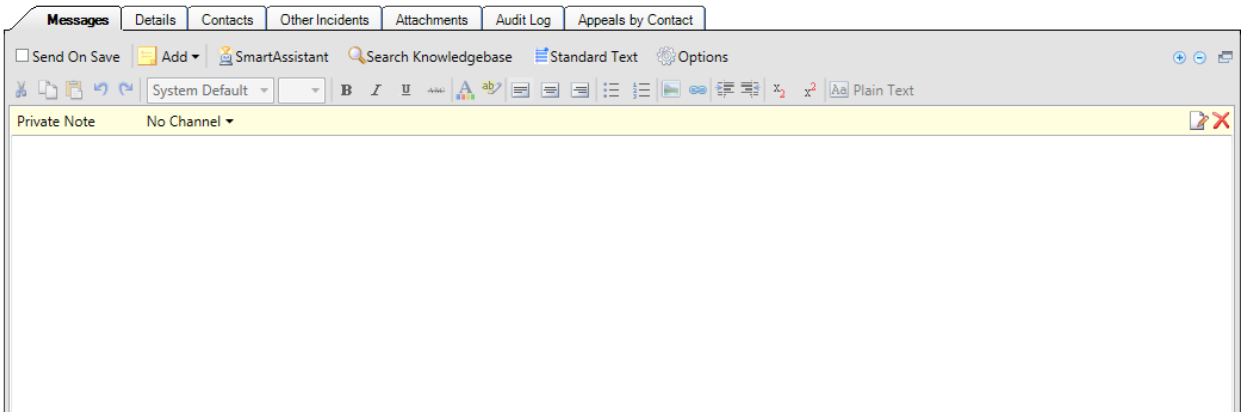
- R&R Appeals
- R&R Appeals_Management

3.3 R&R Appeals Workspaces

3.3.1 R&R Workspace layouts

1. Incident – Appeal\Appeal Incident WS



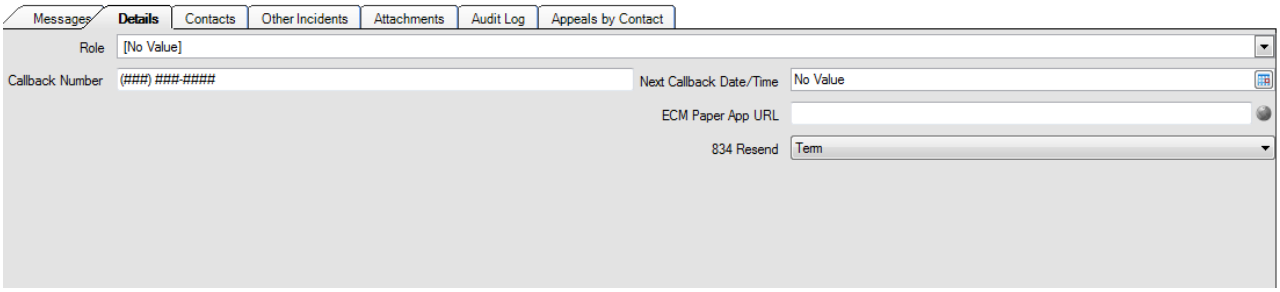


Label	Description	Options	Required	CRM Field	Notes
Subject			yes	Incident.Subject	
Type	Incident Type		yes		
Status	Incident Status		yes		
Contact	Appeal claimant		yes		
Queue	Queue incident/appeal assigned		no		
Assigned	Analyst Assigned to incident		no		
Incident Ref. #	Incident ID		no		Will populate automatically when incident created
Resolution			no		
Application ID			no		
Case ID			no		
ACA Appeal #	7 characters, numeric only		no		
CalHEERS Ticket Closed	Date CalHEERs tkt closed		no		

CalHEERS Ticket Number			no		
Cal HEERS Ticket Submitted	Date CalHEERs tkt submitted		no		
Outreach Opt In			yes		

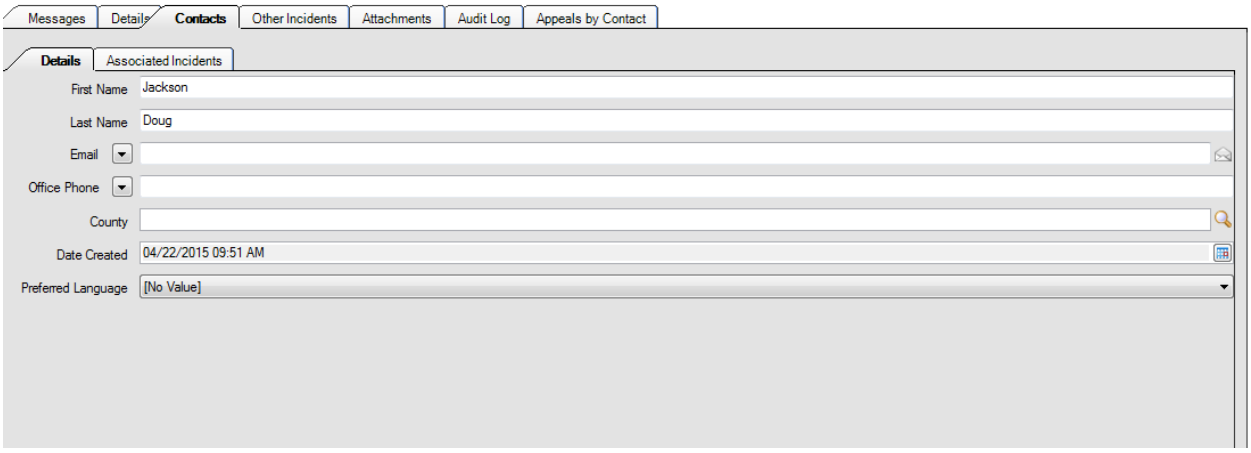
Additional Incident tabs:

Details



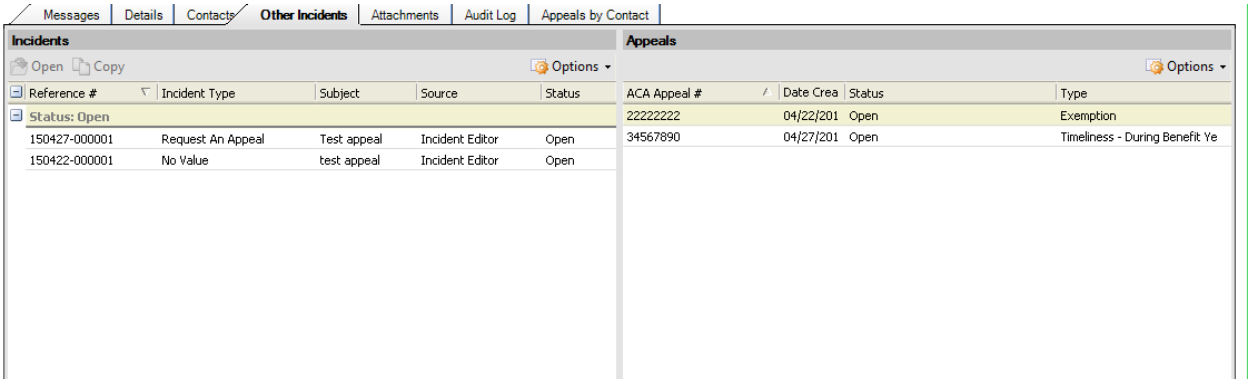
Label	Description	Options	Required	CRM Field	Notes
Role	Contacts Role	- Individual - SHOP - CEC - Other			
Callback Number	Contact callback number additional				
Next Callback Date/Time	Time field if needed to manage customer contact				
ECM Paper App URL	URL for link to scanned docs from Novatext				
834 resend	Available to use if 834 resend tracking needed				

Contacts:

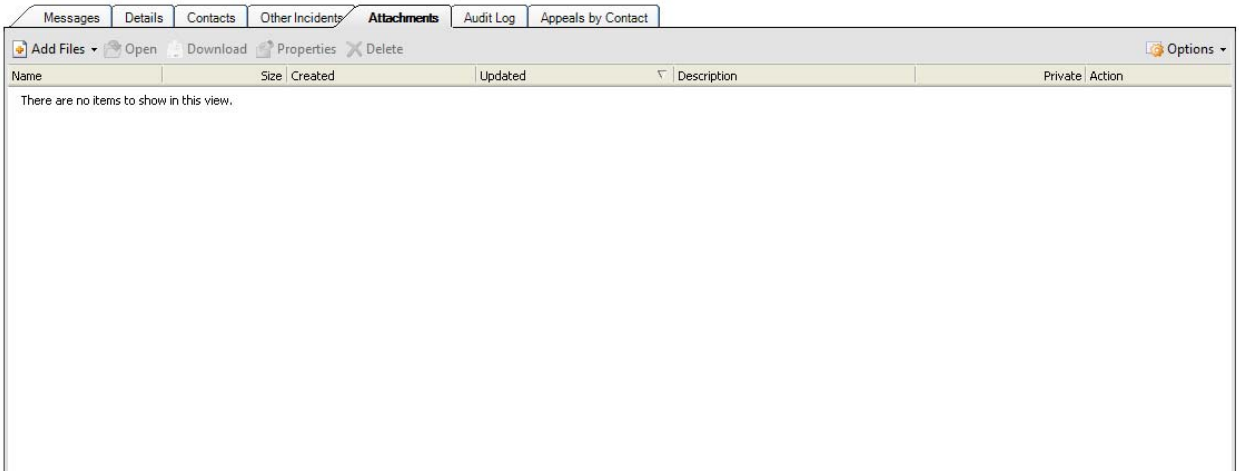


Label	Description	Options	Required	CRM Field	Notes
First Name	Contact First Name				
Last Name	Contact Last Name				
Email	Contact email				
Phone		- office - mobile - fax - assistant - home			
County	Contacts county of residence	All CA counties			
Date Created	Date contact entry created				
Preferred Language	Contact preferred language				

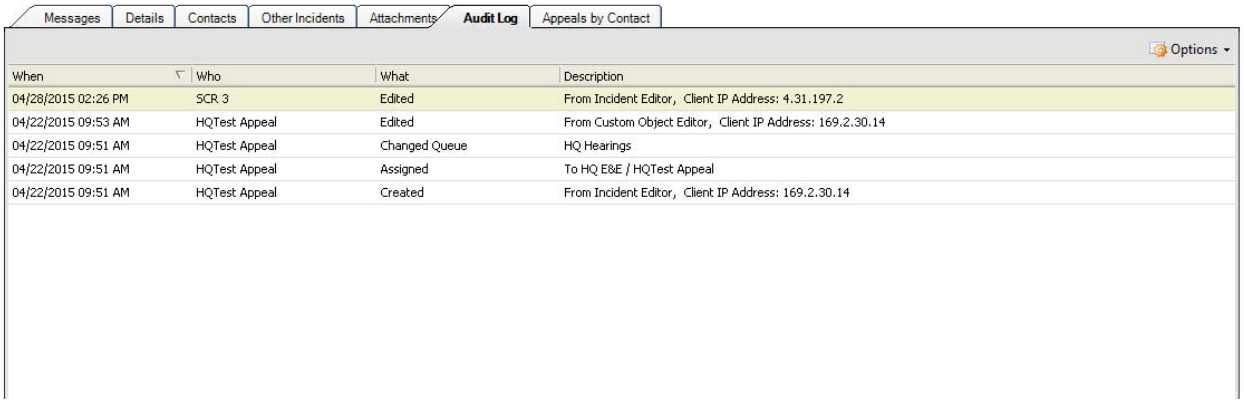
Other Incidents:



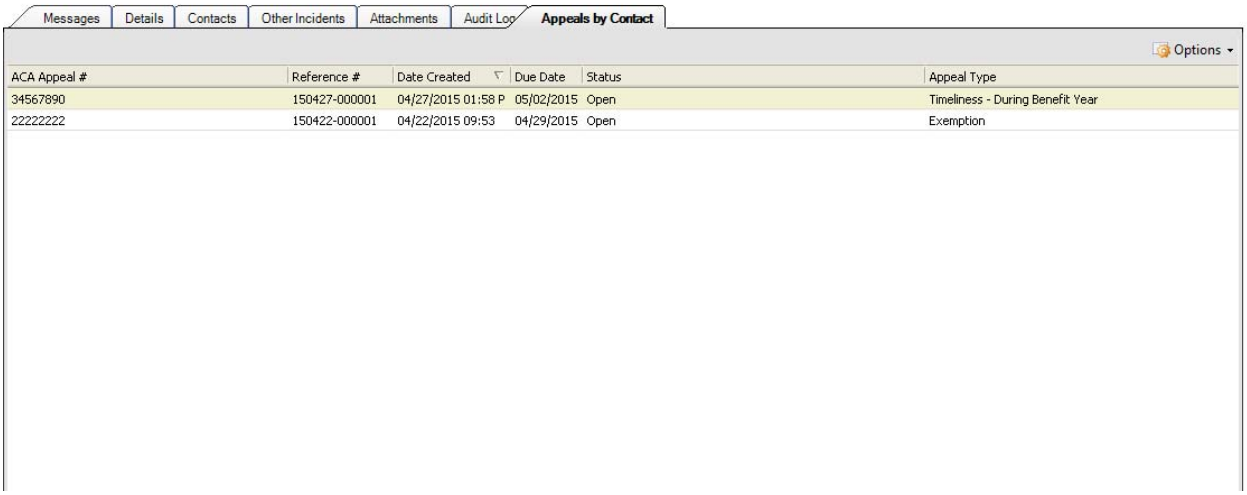
Attachments:



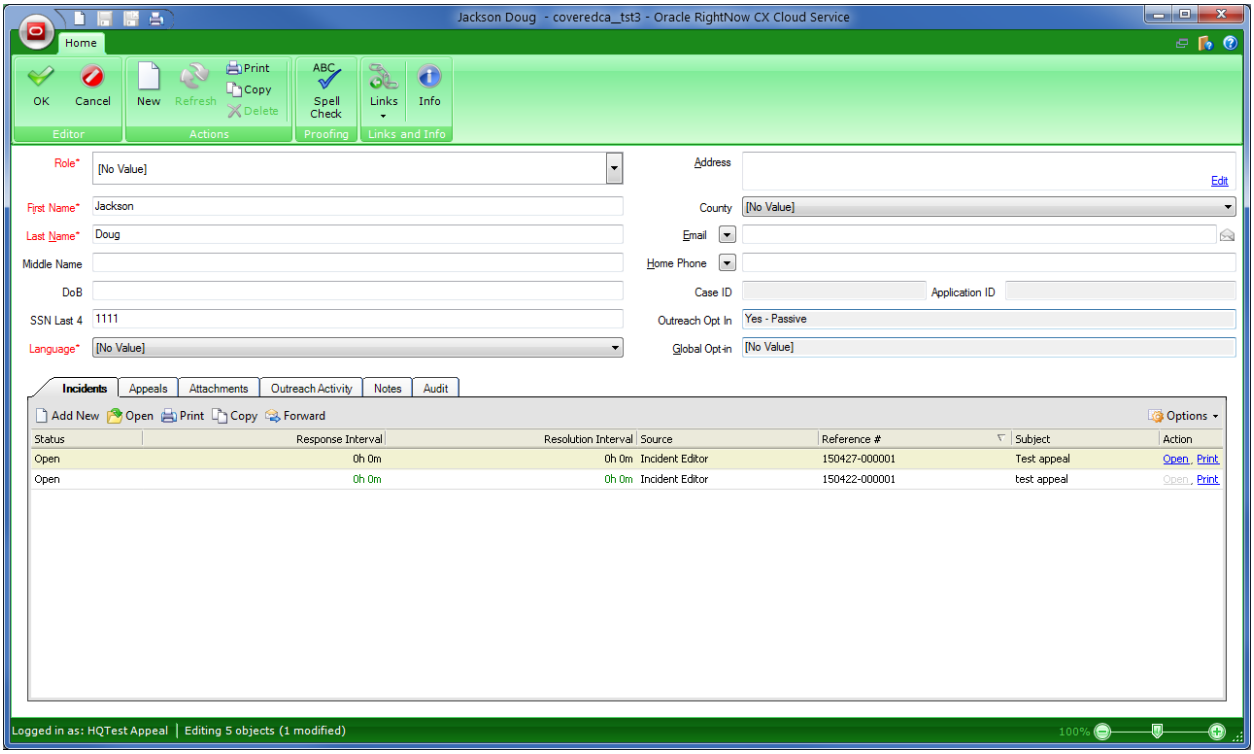
Audit Log:



Appeals by Contact:



2. Contact - Appeal\Appeal Contact



Label	Description	Options	Required	CRM Field	Notes
Role		- Individual - Health Plan	Yes		

		- Agent - Authorized Rep			
First Name	First Name		Yes		
Last Name	Last Name		Yes		
Middle Name	Middle Name				
DoB	Date of Birth				
SSN Last 4	Contact last 4 SSN				
Language	Preferred Language		Yes		
Address	Residence Address				
County	Residence County				
Email	Email				
Home Phone	Phone	- Office - Mobile - Fax - Assistant - Home			
Case ID	CalHEERs Case ID				
Application ID	CalHEERs Application ID				
Outreach Opt In	Does Contact want unsolicited communications from CoveredCA		Yes		
Global Opt-In					

3.4 R&R Appeals Workspace Rules

3.7.1 Incident Workspace Rules

With this request no group outside the appeals groups R&R and HQ should be allowed to assign an incident to the BO T1 –Research queue. To make this queue no longer visible to the outside groups the following workspace rules had to be modified in the noted profiles/workspaces:

Profiles that could see Back Office T1 queue:

- EC – (WS – Incident_EC)
  - I – Hide queues (Took off prod 09/08/2015)
  - I - Set BO T1 Research Date
- SCR Sup – (WS – SCR Incident)
  - I - Limit Queues – SCR Lead (Took off prod 09/08/2015)
  - I – Limit Queues – SCR Supervisor (Took off prod 09/08/2015)
  - I – Set Date Referred to Back Office T1 Research
- CRT – (WS – CRT Incident)
  - I - CRT: Show Queues rule (Took off prod 09/08/2015)
  - I - Limit Queues- CRT Supervisor (Took off prod 09/08/2015)
  - I - Set Date Referred to Back Office T1 Research
- CRT Sup – (WS – CRT Incident)
  - I – CRT: Show Queues rule (Took off prod 09/08/2015)
  - I – Limit Queues – CRT Supervisor (Took off prod 09/08/2015)
  - I – Set Date Referred to Back Office T1 Research
- Appeals
  - I – Filter Allowed Queues for Appeals
  - I - Set Queue: Complaints to BO T1 (Inactivating rule 09/09/2015)
  - I – Queue becomes BOT1 research
- OCP – (WS – OCP Incident WS with Appeals)
  - I – Queue Exclusions (Took off prod 09/09/2015)
  - I – Hide R+R and E+E queue if type is not appeals (Took off prod 09/09/2015)
- KB Pilot – (WS – SCR Pilot Group – Incident)
  - I – Limit Queues – SCR Lead (Took off prod 09/15/2015)
  - I – Limit Queues – SCR Supervisor (Took off prod 09/15/2015)

3.5 R&R Special Appeals Reports (BO T1 – Research specific)

R&R Analysts

Home:

- Unassigned BO T1 Research – My Appeals Dashboard

Incidents:

- Unassigned BO T1 Research
- All BO T1 Research Incidents

R&R Mgmt

Home:

- All BO T1 Research Incidents (R_R Appeals Mgmt Dashboard)

Incidents:

- All BO T1 Research Incidents (All open BO T1 Research queue incidents)
- Unassigned BO T1 Research (All open BO T1 Research queue incidents that are not assigned to an analyst)

4 SITE-WIDE CONFIGURATION

4.1 Products, Categories and Dispositions

Add products and categories for grouping incidents, resulting in more accurate search results for staff members and customers. Use dispositions as a way to record the final resolution of a solved incident.

4.1.1 Products

- None added for Appeals

4.1.2 Categories

- None added for Appeals

4.1.3 Dispositions

- None added for Appeals

4.1.4 Queues

- BO T1 - Research

4.1.5 Workflows

- None added for Appeals

5 DESIGN ISSUES

The following section includes items that require further clarity in the design of this project. This does not include all project issues, just items which require resolution for completion of the design of this project.

- None applicable for this project.

6 APPENDIX A – FIELDS ADDED/MODIFIED

6.1 Incident

Custom Fields

- RR BOT1R queue to Appeal Date (Date/Time incident transitions from BOT1 research queue to R&R Appeals queue)

6.2 Appeal

Custom Fields

- RR to HQ Escalated Date (Date/Time that incident transitions from R&R Appeals to HQ queue)
- RR HQ Resolved Date (Date/Time HQ resolves appeal)
- RR Resolved Date (Date/Time R&R Appeals analyst resolves appeal)

Appeal Incident WS - coveredca_tst3 - Oracle RightNow CX Cloud Service

Object Tools

Home | Insert Field | Insert Control | Design | Rules | CTI

Messages | Show Details | Delete | Add Tab After | Add Tab Before | Move Right | Tab Indexes | Selected Object

Read Only | Required | Hidden | Tab Order | Behavior

Text | Label

Analytics

Analytics Items

- Reports Explorer
- Logs
- Queue Reports
- Customer Portal
- Site Effectiveness
- Visit Tracking
- No Assigned No Queue
- Reports Waiting in Queue
- Contact Lists Explorer
- Agent by Last Action

Customize List...

Recent Items

- 150504-000035

Quick Search

Contact Quick Search

Home | Incidents | Contacts | Answers | Analytics | Configuration | Surveys | Communication Center | Mailings | Tasks | Event

Live Media Bar

Login Chat | Logged Out | Request Chat | Cancel Request | No Chats | Connectivity

My Dashboard 2.5 | Profiles | Workspaces/Workflows Explorer | Appeal Incident WS

Subject*

Type* [No Value]

Status* Open

Contact*

Queue [No Value]

Assigned [No Value]

Create Appeal

Incident Ref. #

Resolution [No Value]

Application ID

Case ID

ACA Appeal #

CalHEERS Ticket Closed No Value

CalHEERS Ticket Number

CalHEERS Ticket Submitted No Value

Outreach Opt In* [No Value]

Messages | Details | Contacts | Other Incidents | Attachments | Audit Log | Closed Incident Add-In | Rules Hit by Incident | Appeals by Contact

Send On Save | Add | SmartAssistant | Search Knowledgebase | Standard Text | Options

Plain Text

Logged in as: Renee Cooper | CTI Status: Disconnected | CC: Connected | 100%

Appeal Incident WS - coveredca_tst3 - Oracle RightNow CX Cloud Service

Object Tools

Home | Insert Field | Insert Control | Design | Rules | CTI

Details | Show Details | Delete | Add Tab After | Add Tab Before | Move Right | Move Left | Tab Indexes | Selected Object

Read Only | Required | Hidden | Tab Order | Behavior

Text | Label

Analytics

Analytics Items

- Reports Explorer
- Logs
- Queue Reports
- Customer Portal
- Site Effectiveness
- Visit Tracking
- No Assigned No Queue
- Reports Waiting in Queue
- Contact Lists Explorer
- Agent by Last Action

Customize List...

Recent Items

- 150504-000035

Quick Search

Contact Quick Search

Home | Incidents | Contacts | Answers | Analytics | Configuration | Surveys | Communication Center | Mailings | Tasks | Event

Live Media Bar

Login Chat | Logged Out | Request Chat | Cancel Request | No Chats | Connectivity

My Dashboard 2.5 | Profiles | Workspaces/Workflows Explorer | Appeal Incident WS

Subject* | Incident Ref. #

Type* [No Value] | Resolution [No Value]

Status* Open | Application ID | Case ID

Contact* | ACA Appeal # | CalHEERS Ticket Closed No Value

Queue [No Value] | CalHEERS Ticket Number | CalHEERS Ticket Submitted No Value

Assigned [No Value] | Outreach Opt In* [No Value]

Create Appeal

Messages | Details | Contacts | Other Incidents | Attachments | Audit Log | Closed Incident Add-In | Rules Hit by Incident | Appeals by Contact

Role

Callback Number (###) ###-#### | Next Callback Date/Time No Value

Carrier [No Value] | ECM Paper App URL

834 Resend Term

834 Resend Date No Value

Logged in as: Renee Cooper | CTI Status: Disconnected | CC: Connected | 100%

Messages | Details | **Contacts** | Other Incidents | Attachments | Audit Log | Closed Incident Add-In | Rules Hit by Incident | Appeals by Contact

Details | Associated Incidents | Authorized Reps

First Name

Last Name

Email

Office Phone

County

Date Created No Value

Preferred Language [No Value]

Messages | Details | **Contacts** | Other Incidents | Attachments | Audit Log | Closed Incident Add-In | Rules Hit by Incident | Appeals by Contact

Details | **Associated Incidents** | Authorized Reps

Associate

Options

Status	Subject	Reference #	Source	Incident Type	Inquiry Reason	Closed for 5 Days?

There are no items to show in this view.

Messages | Details | **Contacts** | Other Incidents | Attachments | Audit Log | Closed Incident Add-In | Rules Hit by Incident | Appeals by Contact

Details | Associated Incidents | **Authorized Reps**

Primary Authorized Contact

Secondary Authorized Contact

atus: Disconnected CC: Connected 100%

Messages | Details | Contacts | **Other Incidents** | Attachments | Audit Log | Closed Incident Add-In | Rules Hit by Incident | Appeals by Contact

Incidents

Open Copy Options

Reference #	Incident Type	Subject	Source	Status
There are no items to show in this view.				

Appeals

Options

ACA Appeal #	Date Creat	Status	Type
There are no items to show in this view.			

tatus: Disconnected CC: Connected 100%

Messages | Details | Contacts | Other Incidents | Attachments | **Audit Log** | Closed Incident Add-In | Rules Hit by Incident | Appeals by Contact

Options

There are no items to show in this view.

Messages | Details | Contacts | Other Incidents | Attachments | Audit Log | **Closed Incident Add-In** | Rules Hit by Incident | Appeals by Contact

DO NOT REMOVE THIS TAB - KEEP HIDDEN

Queue [No Value]

Assigned [No Value]

ID

C$RrEscalatedDate Incident.C$RrEscalatedDate Custom Field not available

Primary Contact

C

Status: Connecting... CC: Connected 100%

Messages | Details | Contacts | Other Incidents | Attachments | Audit Log | Closed Incident Add-In | Rules Hit by Incident | **Appeals by Contact**

Options

ACA Appeal #	Reference #	Date Created	Due Date	Status	Appeal Type

There are no items to show in this view.

Appeal WS - coveredca_tst3 - Oracle RightNow CX Cloud Service

Object Tools

Home | Insert Field | Insert Control | Design | Rules | CTI

Preview | Label | Layout | Behavior | Fields | Workspace Properties

Analytics

Analytics Items

- Reports Explorer
- Logs
- Queue Reports
- Customer Portal
- Site Effectiveness
- Visit Tracking
- No Assigned No Queue
- Reports Waiting in Queue
- Contact Lists Explorer
- Agent by Last Action

Customize List...

Recent Items

- 150504-000035

Quick Search

Contact Quick Search

Home
Incidents
Contacts
Answers
Analytics
Configuration
Surveys
Communication Center
Mailings
Tasks
Event

Live Media Bar

Login Chat | Logged Out | Request Chat | Cancel Request | No Chats | Connectivity

My Dashboard 2.5 | Profiles | Workspaces/Workflows Explorer | Appeal Incident WS | Appeal WS

Subject*				Proj. Adopt. Date	No Value
Contact*		Incident		ALJ	
ACA Appeal #*		Case ID		SOP Complete?	No
Date Received	No Value	Due Date*	No Value	SOP Mailed	No
Expedited Appeal?	No	Queue	[No Value]	SOP Sent Date	No Value
Appeal Type*	[No Value]	Other-Type Description		Dual Case	No
Appeal Status*	Open	Appeal Disposition	[No Value]	County of Action	[No Value]
Source*	DSS	CALHEERS Ticket Needed?	No	Assigned	[No Value]
Description				CalHEERS Tkt #	

Hearing Date	No Value
Decision Released	No Value
Hearing Date (2)	No Value
Hearing Date (3)	No Value
Hearing Date (4)	No Value
Hearing Date (5)	No Value
Incident Status*	Open
CalHEERS Tkt Sub	No Value
CalHEERS Tkt Closed	No Value

Notes | Documents | Appeal Detail | Other Appeals | Authorized Appeal Rep. | Audit Log

Add — Sort: Date - Descending

Logged in as: Renee Cooper | CTI Status: Disconnected | CC: Connected | 100%

Notes | **Documents** | Appeal Detail | Other Appeals | Authorized Appeal Rep. | Audit Log

Add Files | Open | Download | Properties | Delete | Options

Name	Size	Created	Updated	Description	Action

There are no items to show in this view.

Status: Connecting... CC: Connected 100%

Notes | Documents | **Appeal Detail** | Other Appeals | Authorized Appeal Rep. | Audit Log

Case ID (2)		ACA Appeal # (2)	
Case ID (3)		ACA Appeal # (3)	
Case ID (4)		ACA Appeal # (4)	
Case ID (5)		ACA Appeal # (5)	
Date Created	No Value	Created By	
Date Last Updated	No Value	Updated By	
Resolved Date	No Value	ClosedDate	No Value
		RR to HQ Escalated Date	No Value

Status: Disconnected CC: Connected 100%

Notes | Documents | Appeal Detail | **Other Appeals** | Authorized Appeal Rep. | Audit Log

Open | Print | Options

ACA Appeal #	Date Created	Expedited Appeal?	Status	Type

There are no items to show in this view.

atus: Connecting... CC: Connected 100%

Notes | Documents | Appeal Detail | Other Appeals | **Authorized Appeal Rep.** | Audit Log

Add | Open | Print | Copy | Options

Full Name	Email Address	Organization Name	Home Phone	Office Phone	Title	Role - Description	Action

There are no items to show in this view.

User Disconnected CC: Connected 100%

Notes | Documents | Appeal Detail | Other Appeals | Authorized Appeal Rep | **Audit Log**

Options

When	Who	What	Source
There are no items to show in this view.			

tatus: Disconnected CC: Connected 100%

My Appeals Dashboard | 150304-000021 | 55555333

Subject*	Appeal			Expedited Appeal?	No		
Contact*	Curtis Batman	Incident*	150305-000015	Decision to be Received By	No Value	Date Decision Received	No Value
ACA Appeal #*	55555333	Case ID*	7777777777	Hearing Date	No Value	ALJ	
Date Received	03/05/2015	Due Date*	03/19/2015				
Type*	Eligibility - During Benefit Ye						
Appeal Status*	Closed	Appeal Disposition*	Decision Denied				
Incident Status*	Closed	Incident Disposition*	Provided Knowledge :				
Source*	Email	Assigned	Test Appeals				
Help Desk Ticket		Queue	R&R Appeals	Case ID (2)		ACA Appeal # (2)	
Description							

Notes | Documents | Other Appeals | Authorized Appeal Rep. | Audit Log

Add

Sort Date - Descending

Covered CA – External Coordination Incident Management Oracle Service Cloud Solution Definition Document

March 16, 2015

Submitted To: Covered CA

Contents

1 INTRODUCTION 3
1.1 Purpose of Functional Solution Definition 3
1.2 Project Overview and Scope 3
2 REQUIREMENTS 3
2.1 Incident Management 3
2.1.1 Incident Management Process 3
2.1.2 Channels 9
2.1.3 Internal Forwarding 9
2.1.4 New Incident by EC 10
2.1.5 Incident Queues 11
2.1.6 Incident Routing Rules 12
2.1.7 Incident Statuses 12
2.1.8 Standard Text 13
2.1.9 Email Templates 14
2.1.10 Response Requirements 15
2.1.11 Create Incident Workspace 15
2.2 Contact Management 24
2.2.1 Create Contact Workspace 24
2.3 Profiles 29
2.4 Staff Accounts 31

2.5 Reports & Dashboards 31
2.5.1 EC-Manager Navigation Set 31
2.5.2 Analyst Navigation Set 38
2.5.3 Scheduled Reports 39

1 INTRODUCTION

1.1 Purpose of Functional Solution Definition

The purpose of the Functional Solution Definition document is to define and illustrate the functional requirements that Covered CA – External Coordination Oracle Service Cloud should support. The document also serves as a reference and communication guide for the scope and direction of the implementation that [redacted] is completing for Covered CA – External Coordination. The goal is for both Covered CA – External Coordination and [redacted] to review and gain agreement on how Administrators, Managers, Analysts, and contacts are going to use the Service Cloud application and to make sure the use cases and requirements are defined up-front so the application can be configured and tested properly.

1.2 Project Overview and Scope

Covered CA – External Coordination has purchased licenses and an Oracle Service Cloud site and interface with the service modules enabled. Covered CA – External Coordination has contracted [redacted] to complete a solution definition and solution development for implementation of Incident Management for their Oracle Service Cloud solution. The following modules are in scope for implementation:

- Incident/Email Management
- Service Analytics

2 REQUIREMENTS

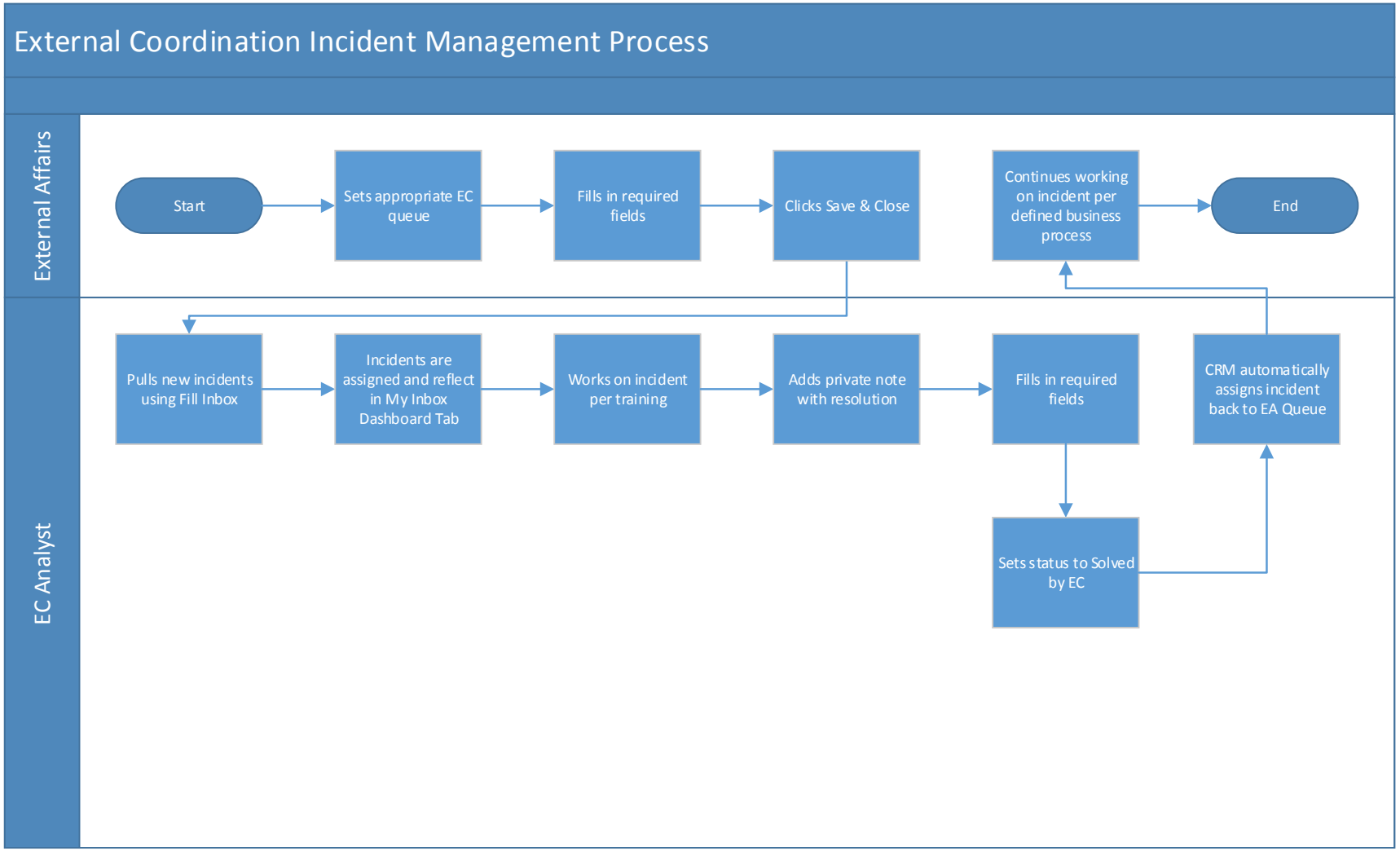
2.1 Incident Management

2.1.1 Incident Management Process

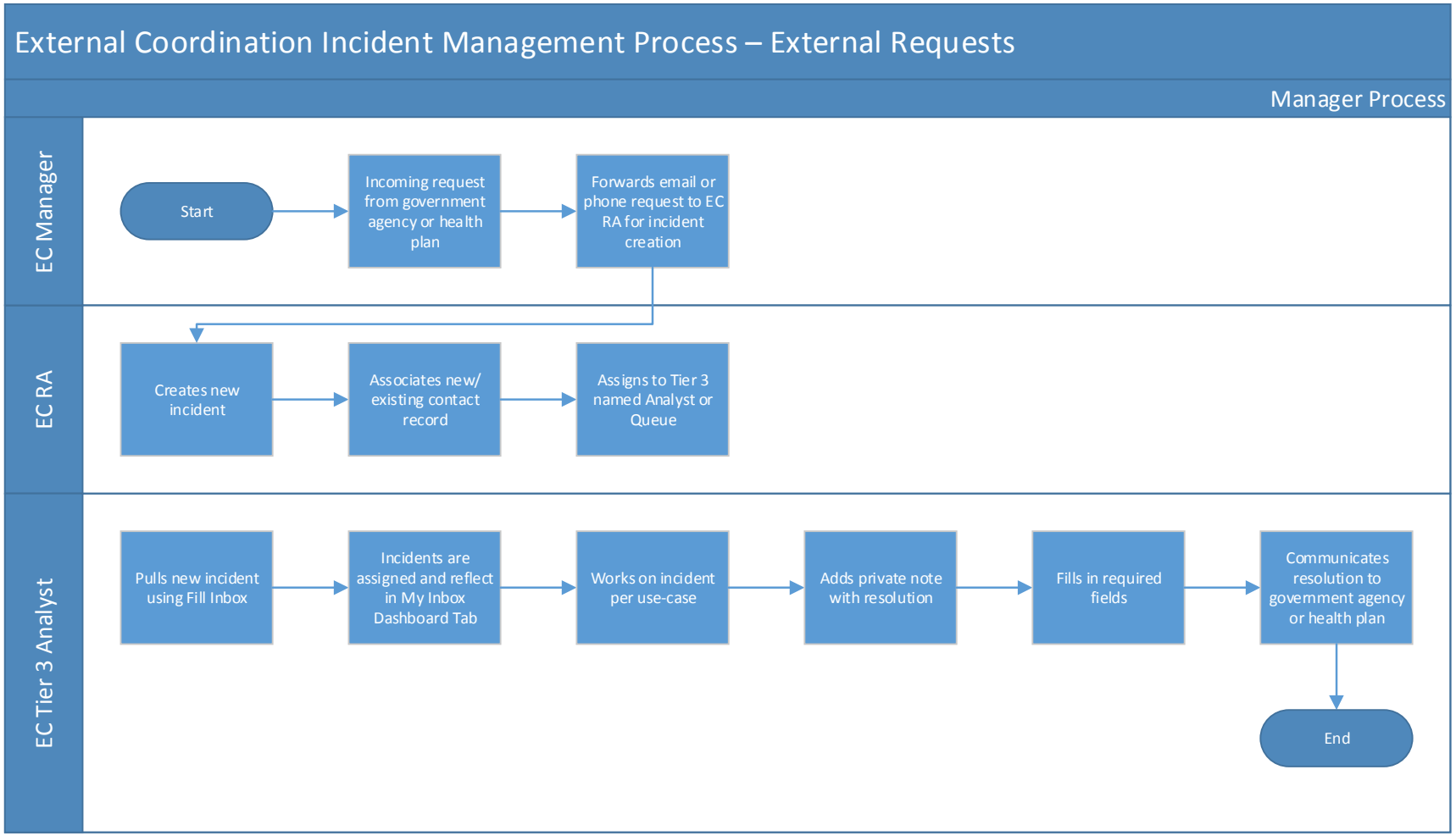
Covered CA – External Coordination will be handling all contacts email communication via incidents in Oracle Service Cloud. An Incident is any question or request for help submitted by a contact on any available channel. Covered CA – External Coordination will receive incidents from other internal or external groups associated to Covered CA as well as have the ability to create new incidents themselves. Each incident will be associated to a unique reference number. External Coordination Analysts will check their dashboard for new or existing open incidents and work on them in order of due date (or SLA). Incidents will be assigned to External Coordination Analysts on a Round-Robin bases and by analysts either using the “Fill Inbox” functionality or manually self-assigning incidents from the queue. Incident management functions are dependent on how analysts handle key incident details. Therefore, all incidents, when opened for editing or created, will start with a focus on the private or

"internal" message tab. Analysts will conduct research according to defined business processes and enter a private note in the messages tab. When the analyst is satisfied with his response he will close the incident and communicate the resolution back to the primary contact using the desired communication method (email or phone). An exception will be made for incident coming from External Affairs. Incidents coming from External Affairs will be automatically assigned back to the EA Queue once the EC Analyst selects the appropriate incident status. For other cases, if the analyst determines that the incident should not have been transferred to External Coordination then the analyst will reassign the incident back to the supervisor of the source group.

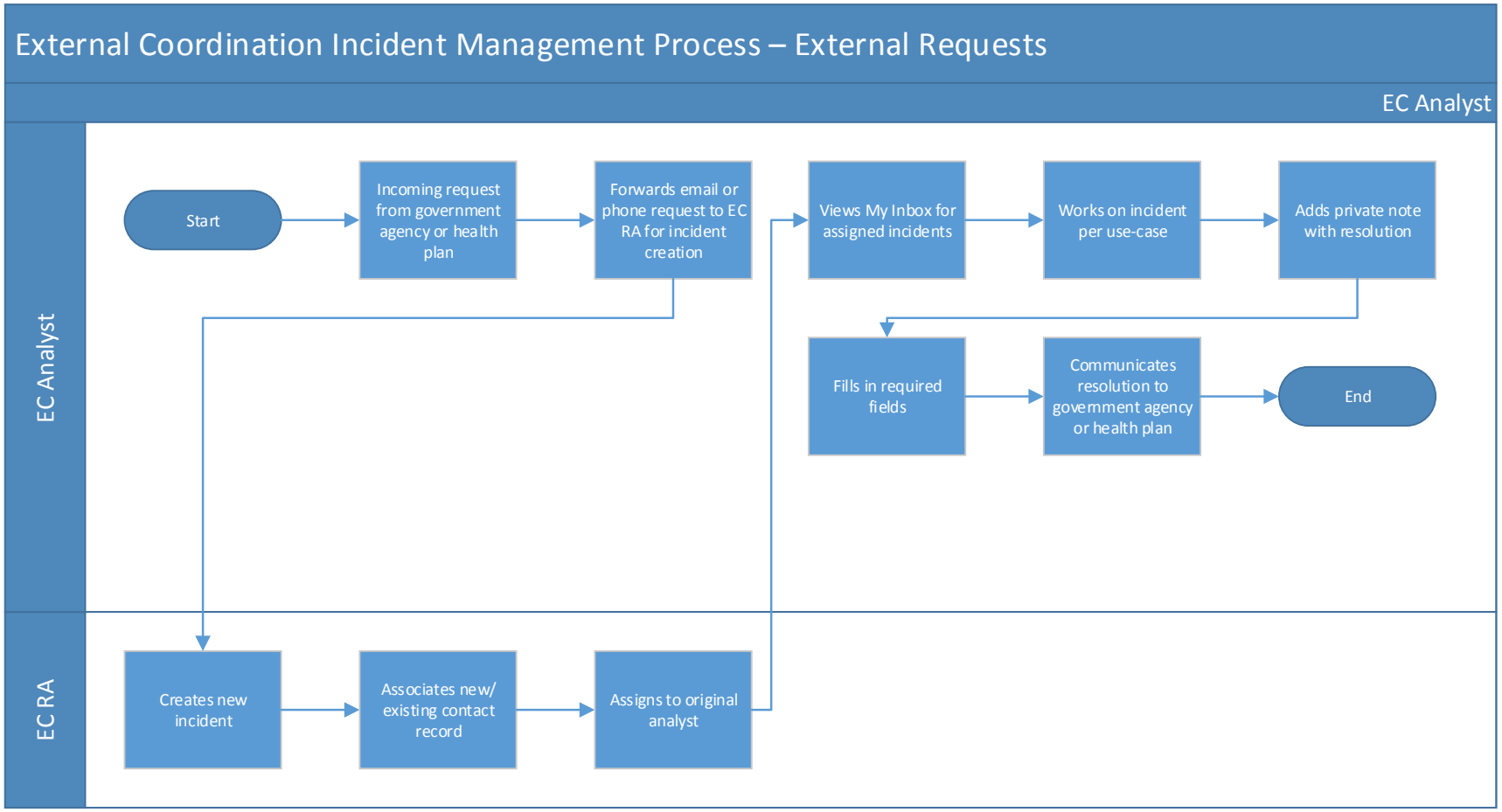
2.1.1.1 Use Case 1 – Internal (External Affairs)


External Coordination Incident Management Process
External Affairs
EC Analyst
Start
Sets appropriate EC queue
Fills in required fields
Clicks Save & Close
Continues working on incident per defined business process
End
Pulls new incidents using Fill Inbox
Incidents are assigned and reflect in My Inbox Dashboard Tab
Works on incident per training
Adds private note with resolution
Fills in required fields
CRM automatically assigns incident back to EA Queue
Sets status to Solved by EC

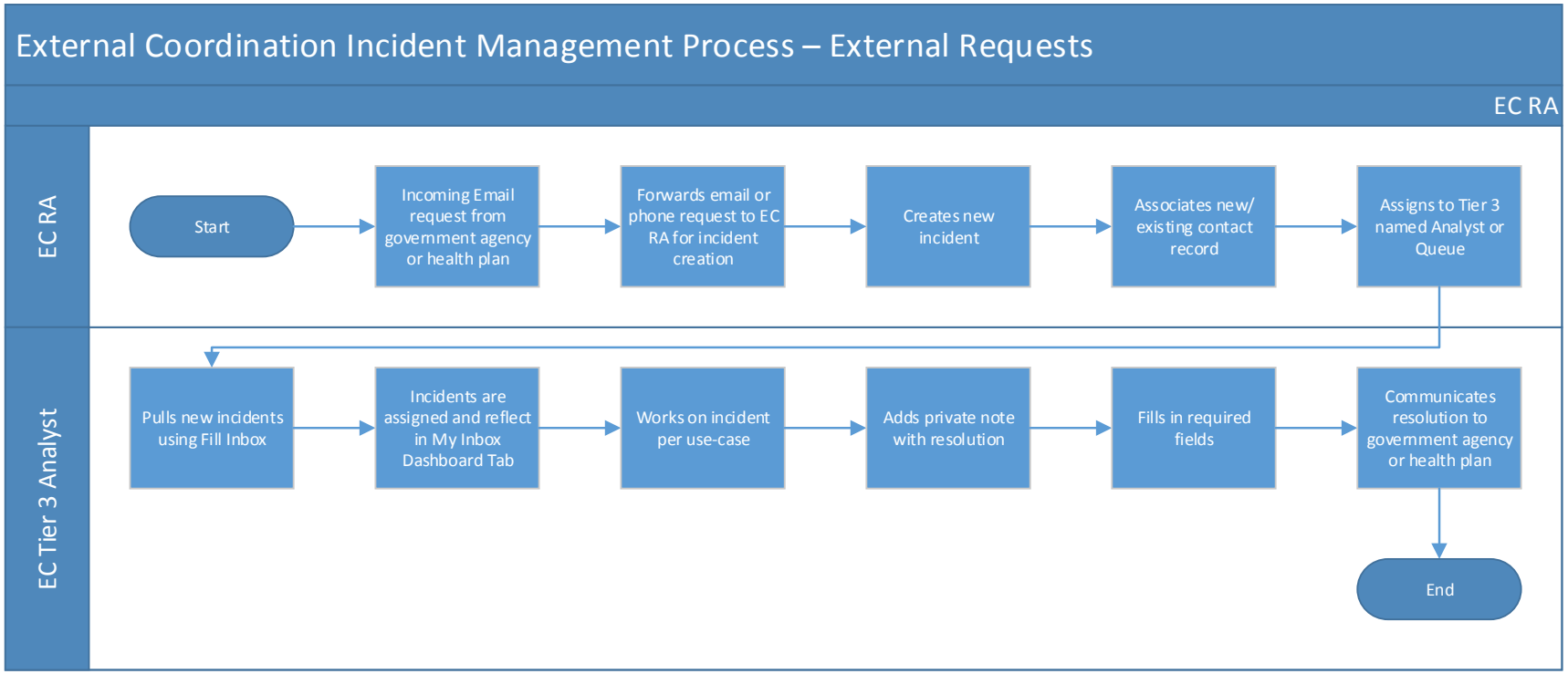
2.1.1.2 Use Case 2 – External – Managers



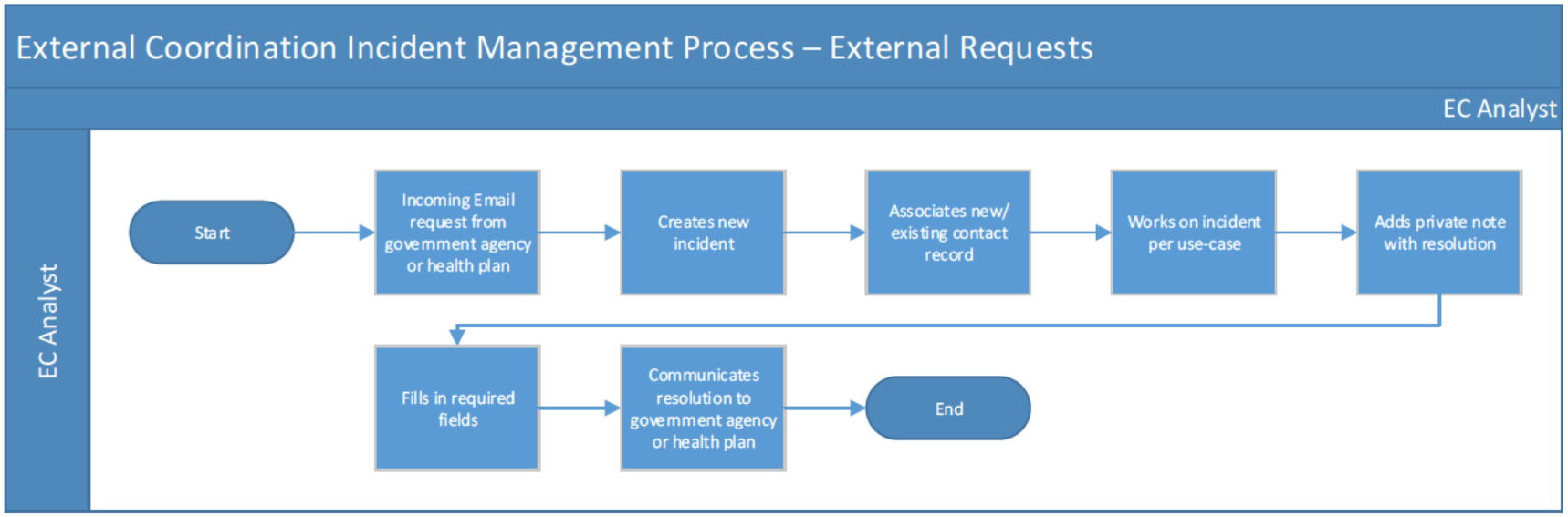
2.1.1.3 Use Case 2 – External - Analyst



2.1.1.4 Use Case 3 – External – Retired Annuitants (RA)



2.1.1.5 Use Case 4 – External – Analyst



2.1.2 Channels

Service Cloud handles incoming incidents from multiple channels including Email, and the Web (Contact Portal).

2.1.3 Internal Forwarding

External Coordination Analysts will be automatically assigned incidents incoming from other groups within Covered CA. Analysts will be assigned to specific EC queues so that they only work on incidents coming from specific groups.

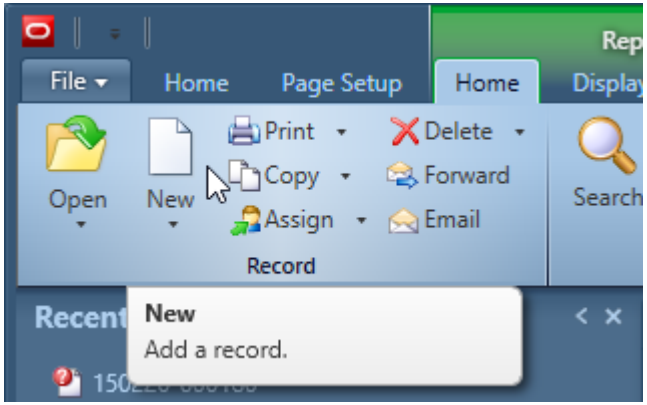
EC Profiles	Incident Priority FROM
EC Tier 1 - Analyst	- CRT - Hotline - SCR - OCP - R&R Appeals
EC Tier 2 – Analyst	- External Affairs

EC Tier 3 – Analyst	- CDPH (CA Dept. of Publish Health) - DHCS (Dept. of Health Care Services) - OPA (Office of Patient Advocacy) - Health Plans
EC Tier 4 – Analyst	- DMHC (Department of Managed Healthcare)
EC Tier 5 – Analyst	- SHOP
EC Tier 6 - RA	- External Coordination
EC Tier 7 – Manager	- External Coordination

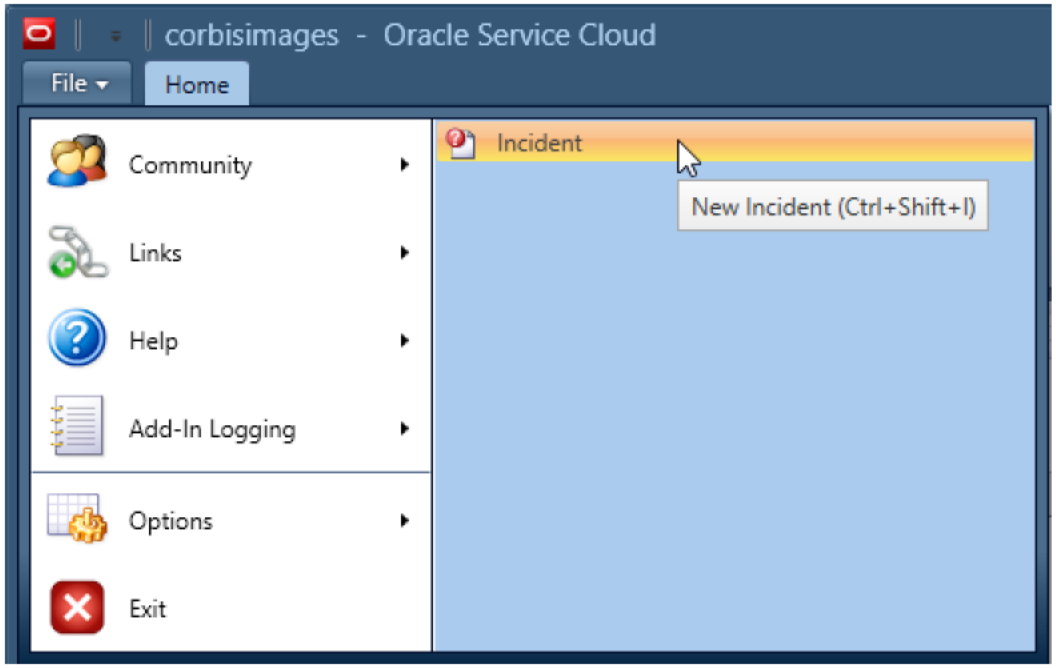
2.1.4 New Incident by EC

At times, the External Coordination Team will need to create new incidents. See all External use cases. New incidents will be created from either

1. The Analyst Dashboard by using the "New" button located in the ribbon bar:



2. Or the File Menu



2.1.5 Incident Queues

A sequence of unassigned, unresolved incidents. When an incident queue is added, it can be defined as the default queue. Incidents are added to queues automatically by business rules or manually by re-queuing and are handled in a first-in, first-out manner.

Queue Name
EC-INT
EC-EA
EC-EXT
EC-DMHC
EC-SHOP
EC-RA
EC-MGR

2.1.6 Incident Routing Rules

Incident routing rules will be configured to route incidents to their appropriate queue based on their incoming email addresses. Analysts will be able to see the assigned queue from their dashboards.

Routing Rule	Rule Definition
Route new incident to the EC-INT Queue	Only if logged in user's profile =
Route new incident to the EC-EA Queue	
Route new incident to the EC-EXT Queue	
Route new incident to the DHMC Queue	
Route new incident to the EC-SHOP Queue	
Route new incident to EC-RA Queue	
Route new incident to EC-MGR Queue	

2.1.7 Incident Statuses

The status of an incident as it moves through the system. Below are the statuses that Covered CA – External Coordination will utilize for tracking purposes. When an Analyst responds to an Incident and clicks Send on Save a response email will be sent out to the primary contact on the incident and the status will not be automatically changed by the system. This is a change in default functionality.

Statuses	Status Definition
Closed	Solved
Open	Unresolved
Updated	Unresolved (This status is automatically selected when an incident has been updated by the contact via an email reply)
Solved by EC	Unresolved (Used by EC when communicating to External Affairs when work has been completed). Only display when incident queue = EC-EA. Workspace rules will set the following when this status is selected: - Set queue = External Affairs - Set EA Status = Completed
EC – In Progress	Open (Incident in-progress)

2.1.8 Standard Text

Text prepared in advance that can be sent to contacts when responding to incidents, appended to responses by a business rule, or sent by an analyst during a chat session. Covered CA – External Coordination analysts will have access to the following standard texts

Name	Text	HotKey
External Coordination Auto Responder Letter (DRAFT)	Hello, Thank you for your email. A member of the External Coordination team will research your issue and respond back to you as quickly as possible. Please remember when sending casework to External Coordination; we ask that you include the following information: ▯ Consumer's Name ▯ Telephone Number ▯ Case # or Application ID # ▯ Consumer's Date of Birth We appreciate your patience while we research this issue. Once we have reached a resolution, you will be notified. Consumers can always call our Service Center at 1-800-300-1506 or visit us online at www.CoveredCA.com to get answers to many frequently asked questions. Thank you! The External Coordination Team	AR

External Coordination Follow-up to Consumer	Hello, The Covered California, External Coordination Team is currently researching the issue you reported. We will contact you as quickly as possible with any updates and/or a resolution. Thank you! The External Coordination Team	CS
External Coordination Unable to Contact Consumer by Phone	Hello, You recently contacted Covered California, regarding an issue with your account. Unfortunately, we've been unable to reach you at the phone number you provided. If you still need assistance please contact the Covered California Service Center at 1-800-300-1506. Thank you! The External Coordination Team	UR

2.1.9 Email Templates

The following emails will be sent automatically to email addresses associated with an incident:

Email Name	Description	Custom Text
Question Receipt	This message is sent to contacts confirming the receipt of their incoming email.	No Customizations at this time
Incident Solved	Sent to a contact when a staff member respond to the incident and the incident status is SOLVED.	No Customizations at this time

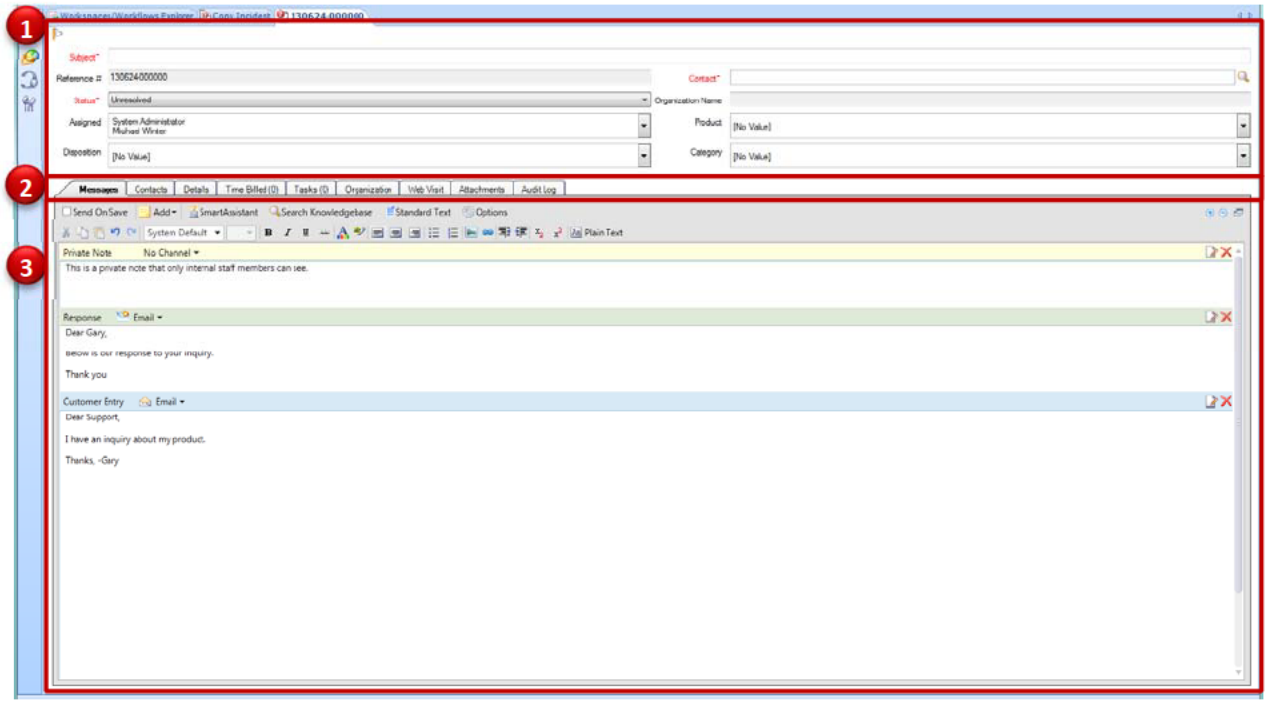
2.1.10 Response Requirements

The response requirements are used to measure analyst performance in responding to and solving incidents and can also be used for SLAs that do not have customized response requirements. Covered CA – External Coordination incidents must be addressed within X amount of hours from queue escalation.

External Coordination to send detailed email

2.1.11 Create Incident Workspace

Workspace screens define the fields and layout that staff use when adding or editing records. The sections below define the incident workspace requirements. Below is a sample illustration of an incident workspace.



1. The top half of the workspace is commonly referred to as the summary or header section of the workspace. This is where staff members typically capture/review summary level information about the incident.

2. The bottom half is where tabs are located, which contain additional information about the Incident record.
3. The Messages tab contains the message thread, where all correspondence between the contact and staff is tracked. Staff will send and receive emails directly from the Messages tab on the incident workspace.

2.1.11.1 Incident Workspace Summary Level

The table below defines the fields on the incident workspace summary level.

Label	Description	Details	Required	CRM Field	Notes
Analyst	The name of the analyst working the incident	• Menu (OOTB Assigned field)	Yes	Incident.assigned	Global
Date Closed	Date the incident was closed	• System Generated	Yes	Incident.closed	Global
Health Plan	Choose the plan associated with the case in error or inquiry. This may not be who they are currently enrolled with. Plan changes should be logged n Resolution.	• Menu ○ Anthem Blue Cross ○ Blue Shield CA ○ Chinese Community ○ Delta Dental ○ Guardian ○ Health Net ○ Kaiser ○ LA Care ○ Liberty ○ MetLife ○ Molina ○ Premiere ○ Sharp ○ Valley Health Plan ○ Western Health Advantage ○ Other	Yes	Incidents.c$carrier	Shared with EA

Label	Description	Details	Required	CRM Field	Notes
Case #	This is the CalHEERS assigned number associated with the case. Enter all associated case #'s including newly created cases.	• Text Area	Yes	Yes	Incident.c$case_id
Action	Choose the action taken to fix the case. If no action was taken, choose No Action.	• Menu ○ New Enrollment/Case ○ Reinstated Enrollment ○ Report a Change ○ Request Denied ○ Term/Re-enroll ○ Terminated Enrollment ○ Multiple contacts with the Health Plan ○ Multiple contacts with the County ○ Communication with Member only ○ Redirected ○ Member Unreachable ○ CalHEERS Ticket	Yes – only when status changed to Closed or Resolved	No	Incident.cc$ec_action

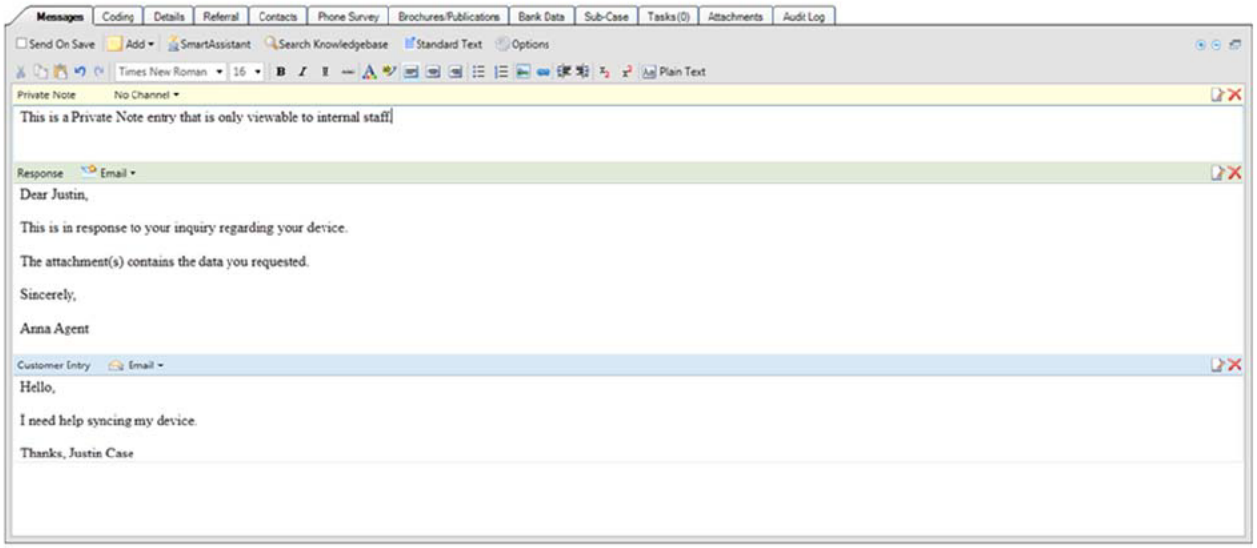
Label	Description	Details	Required	CRM Field	Notes
CalHEERS Ticket#	When you encounter a CalHEERS issue when attempting to complete the documented process (RAC, Term, Term/re-enroll, reinstate, etc.), you need to submit a CalHEERS ticket.	• Text Field	Optional	Yes	Incident.c$ch_ticket_no
Ticket Submitted Date	Enter the date you submitted the CalHEERS ticket	• Date Field	Optional	Yes	Incident.c$ ch_ticket_sub_date
Ticket Closed Date	This is the date you get a closure date from CalHEERS, if you reopen then SAME CASE enter another entry.	• Date Field	Optional	Yes	Incident.c$ ch_ticket_closed
Status	Current incident status	• Menu	Required	Yes	Incident.status
Contact	Primary Contact record associated to the incident	• Lookup	Required	Yes	Incident.cid
Subject	Incident Subject	• Text Field	Required	Yes	Incident.subject
Queue	Incident Queue	• Menu • Queue value will be set to "No Value" if incident is brand new	Required	Yes	Incident.queue
Call Back Date	Date for analyst to call-back	• Date/Time	Optional	Yes	Incident.c$ callback_date_time

Label	Description	Details	Required	CRM Field	Notes
Category/ Type	EC-specific incident categories	• Menu ○ Urgent Access to Care (default) ▪ Life Threatening Condition ▪ Life Sustaining Prescription ▪ Urgent Medical Treatments	Required	Yes	Incident.CatID
EC – Type	Custom EC incident types	• Menu ○ Adding/Removing Household Member (not babies) ○ APTC ○ Babies ○ CalHEERS Defect ○ Contact Changes or Termination (Address, Name, Etc.) ○ Effective Date ○ Enrollment Discrepancy with Carriers ○ Medi-Cal ○ No Category ○ Payment/Premium Issues with Carriers ○ Primary Contact Changes or Termination ○ Transfer (Back to Ops, Appeals)	Required	No	Incident.c$es_escalation_type

Label	Description	Details	Required	CRM Field	Notes
Carrier	Associated Carrier		Optional	Yes	
Phone Number	Contact Phone Number		Optional	Yes	Contact.ph_home
EA Status	Status for EA team – Requested by EA. Workspace rule will set this field automatically.		Read-Only	Yes	Incident.c$EaStatus
Date Resolved	Date EC resolved issue – Requested by EA. Workspace rule will set this field automatically.		Read-Only	Yes	Incident.c$date_resolvedby_ec
EC-Follow-Up	Date for Contact follow-up by Analyst	Date/Time Field	Optional	No	
EC Follow-Up Type	Description for Follow-up date	• Menu ○ Follow up with carrier ○ Follow up with consumer ○ Follow up with county ○ Pending Carrier Response ○ Pending Consumer Response ○ Pending Help Desk Ticket	Optional	No	Incident.c$ec_flag

2.1.11.2 Incident Workspace Messages Tab

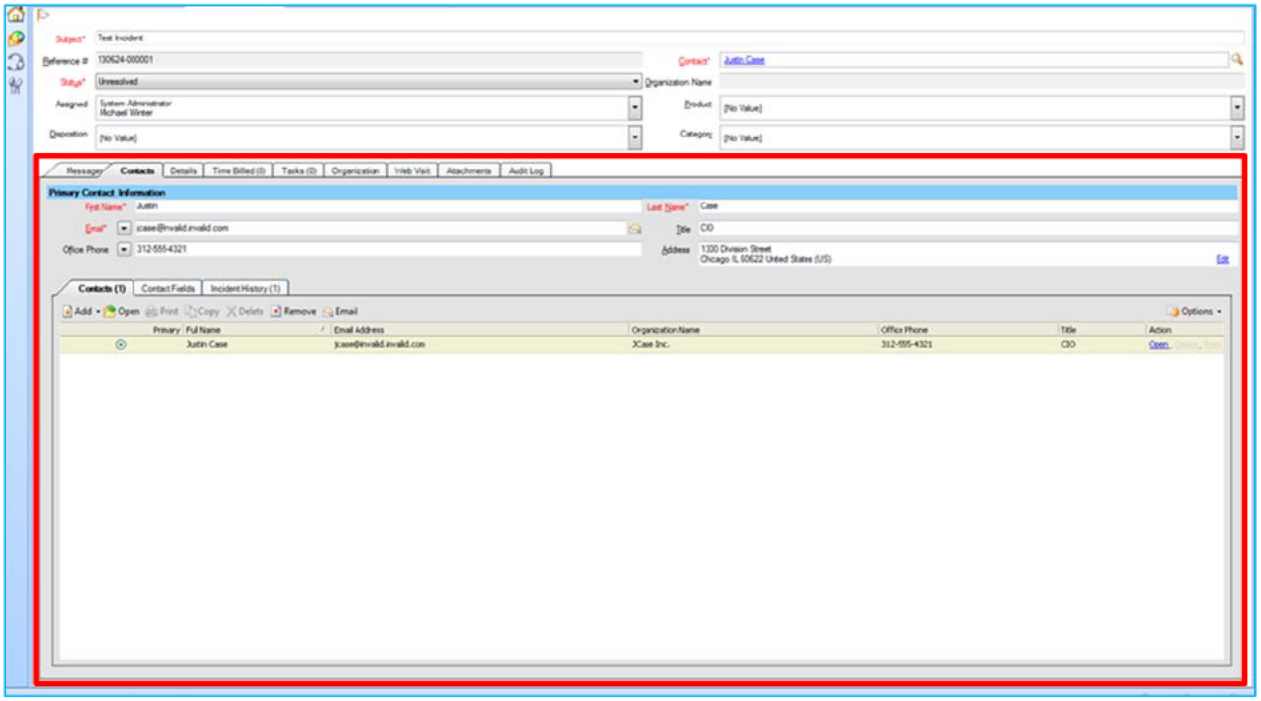
The messages tab contains functionality that enables staff members to document details about the incident, send an email response to the contact related to the incident, or add a private note for internal use only. The image below is a sample illustration of the messages tab.



Label	Description	Details	Required
Description	Enter a brief description of the issue	• OOTB thread field	Yes
Resolution	How this was resolved or why was it not resolved?	• OOTB thread field	Yes

2.1.11.3 Incident Workspace Contacts Tab

Below is a sample illustration of the incident workspace contacts tab. This tab is where staff members can view detailed information about the primary contact, as well as any other contacts associated with the incident.

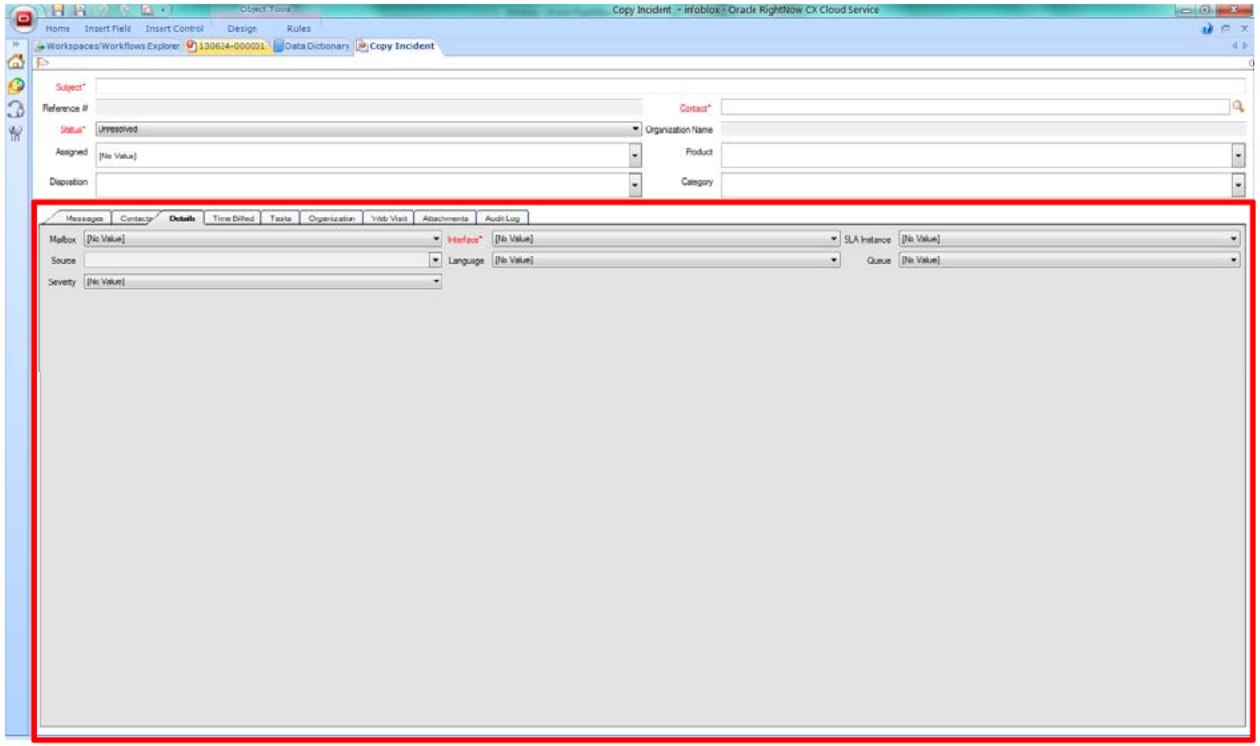


The table below defines the fields on the incident workspace contacts tab.

Label	Notes	Behavior
First Name	The first name of the primary contact on the incident	• Read-only • Optional
Last Name	The last name of the primary contact on the incident	• Read-only • Optional
Email Address	The email address for the contact	• Read-only • Optional
Secondary Contact	View/Add/Delete Secondary Incident contact	

2.1.11.4 Incident Workspace Details Tab

Below is a sample illustration of the incident workspace details tab.



The table below defines the fields on the incident workspace details tab.

Label	Notes	Behavior
Mailbox	The mailbox that incident responses will be sent from	Automatically set to default mailbox unless otherwise set by a rule
Date Created	Date and time incident was created	
Date Initial Solution Response	Date and time the initial solved response was sent to the contact	

Label	Notes	Behavior
Date Last Responded	Date and time of CSA's last email response to the contact	
Date Last Updated	Date and time the incident was last updated	
Date Closed	Date and time the incident status was set to Solved	

2.1.11.5 Incident Workspace Attachments Tab

Enables staff members to attach files to the incident. All out of the box functionality will remain for this incident workspace tab.

2.1.11.6 Incident Workspace Audit Log Tab

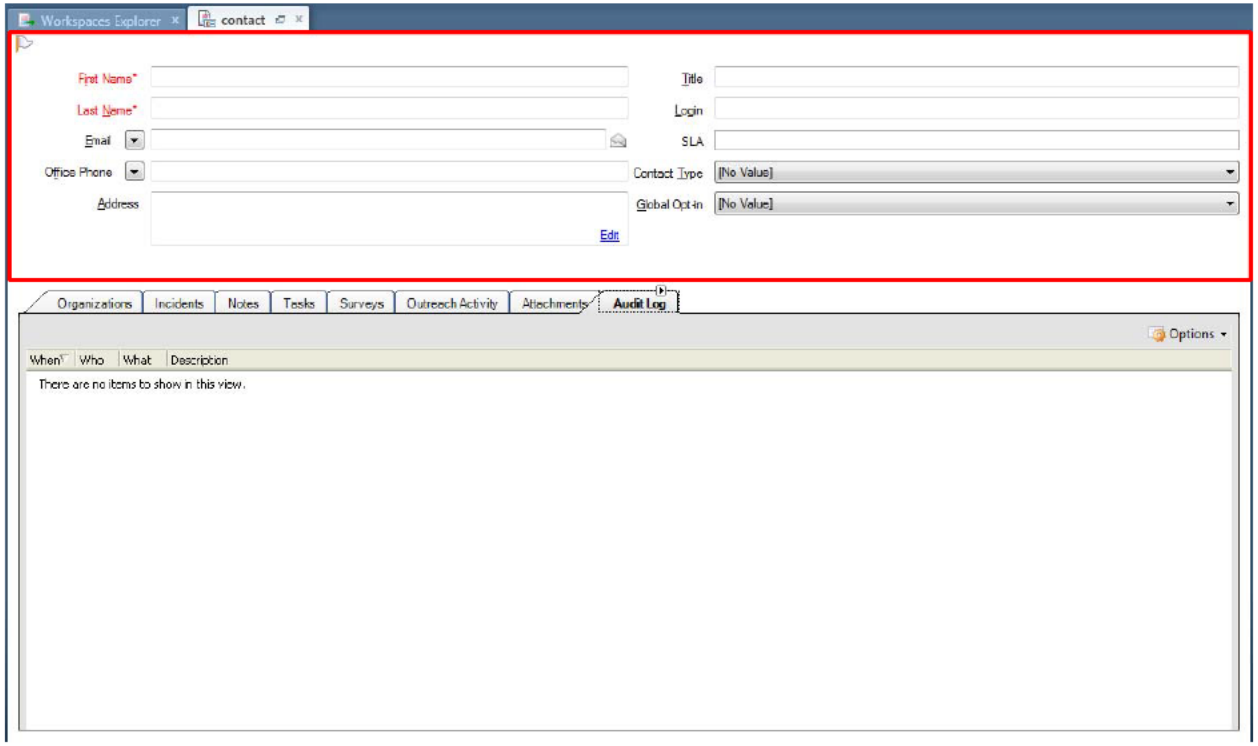
Displays the history of transactions that have taken place on the incident record. All out of the box functionality will remain for this incident workspace tab.

2.2 Contact Management

A contact is any individual with a contact record in the database. Contact records can be added by staff members on the Service Console or automatically by the system when contacts submit an incoming email.

2.2.1 Create Contact Workspace

Workspace screens define the fields and layout that staff use when adding or editing records. The sections below define the contact workspace requirements. Below is a sample illustration of a contact workspace and does not represent the to-be configured solution.



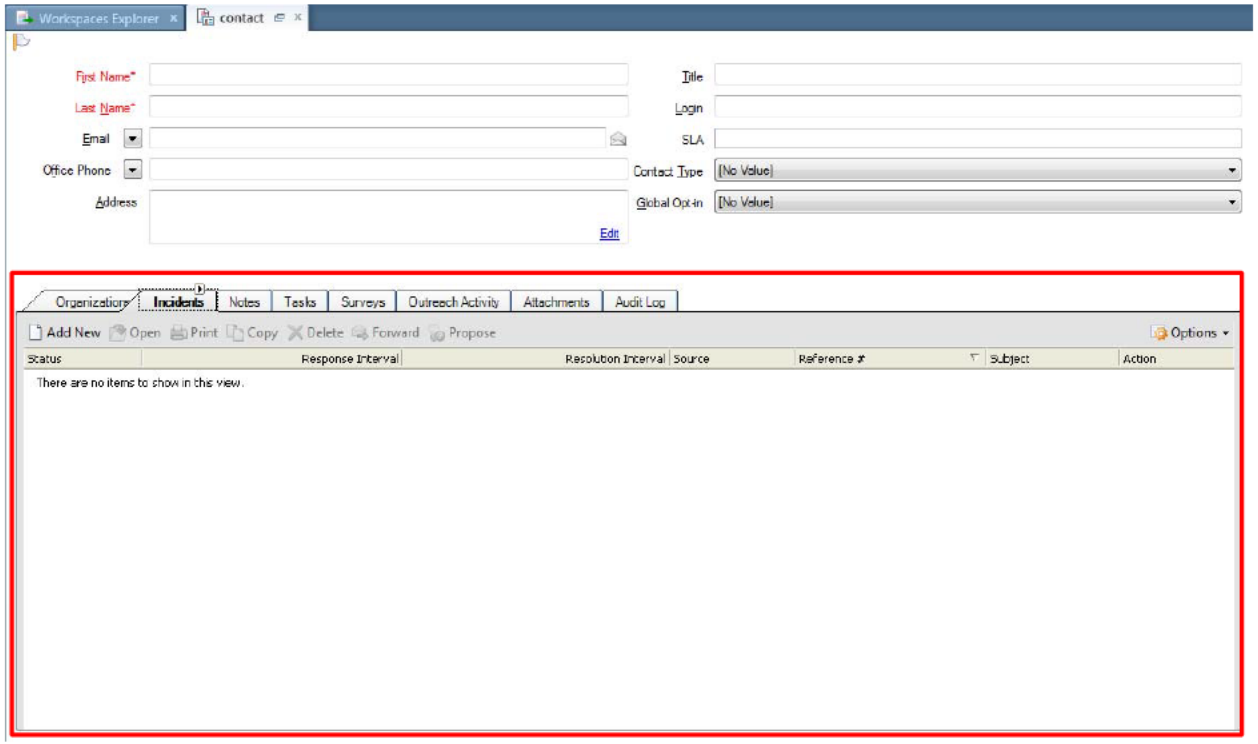
2.2.1.1 Contact Workspace Summary Level

The following fields will be configured in the summary level of the incident workspace.

Label	Notes	Behavior
First Name	Contact's First Name	Required
Last Name	Contact's Last Name	Required
Email	Not required on analyst workspace.	Optional
Home Phone	Contact's Home Phone Number	Optional
Case ID	Contact's Case ID	Optional

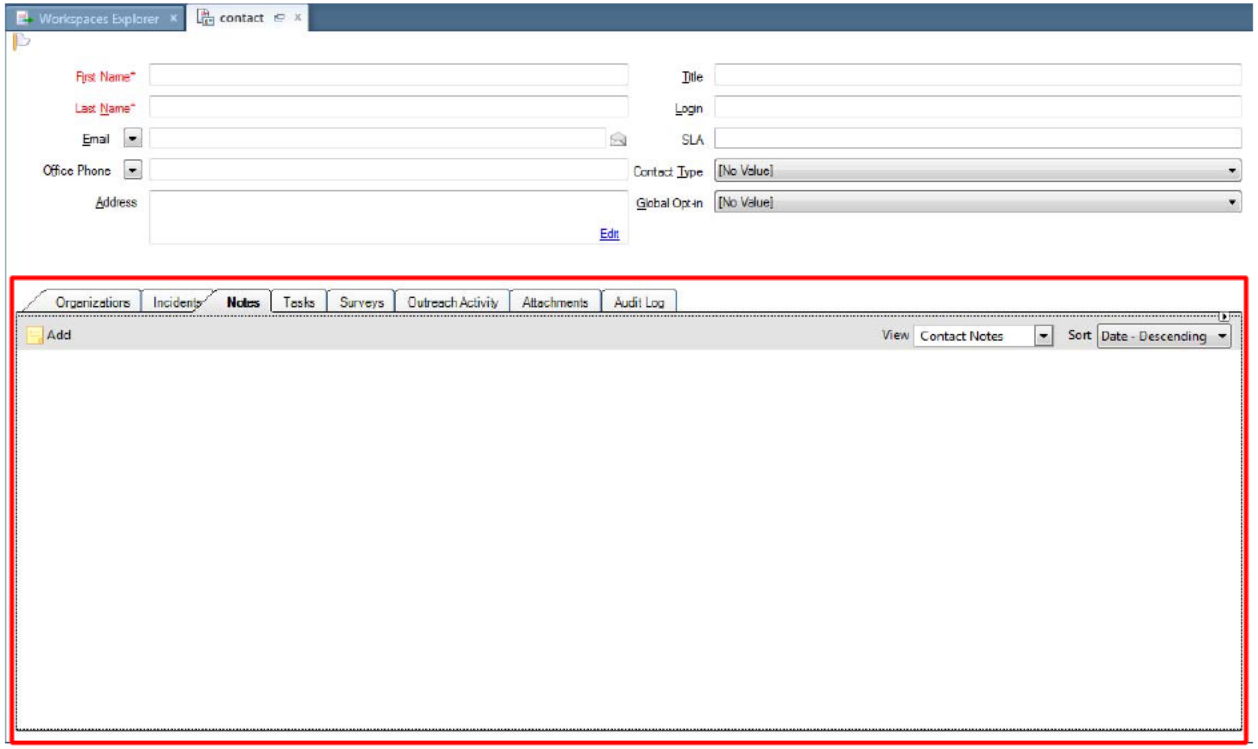
2.2.1.2 Contact Workspace Incidents Tab

Provides a detailed list of the contact's incident history by listing all incidents associated with the contact. This tab will be modified so that it displays incidents for contacts who are associated to an incident but are not the primary contact of the incident.



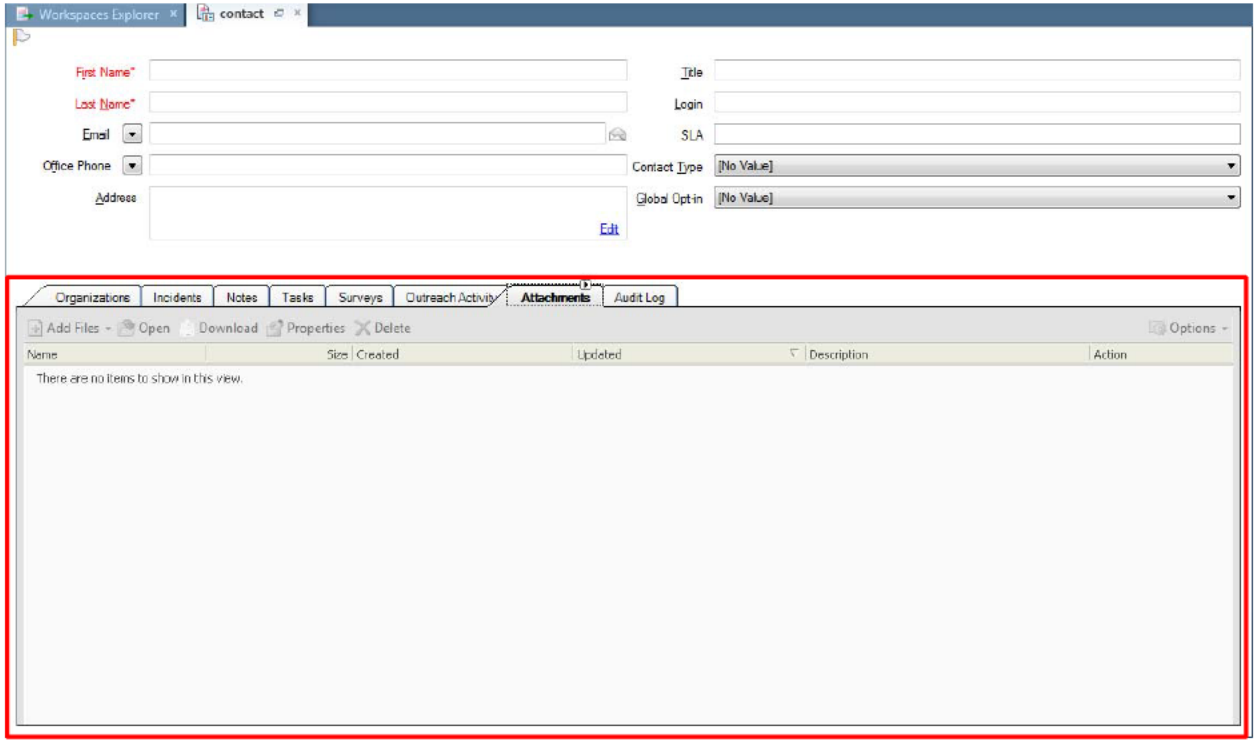
2.2.1.3 Contact Workspace Notes Tab

Enables staff members to create notes. All out of the box functionality will remain for this contact workspace tab.



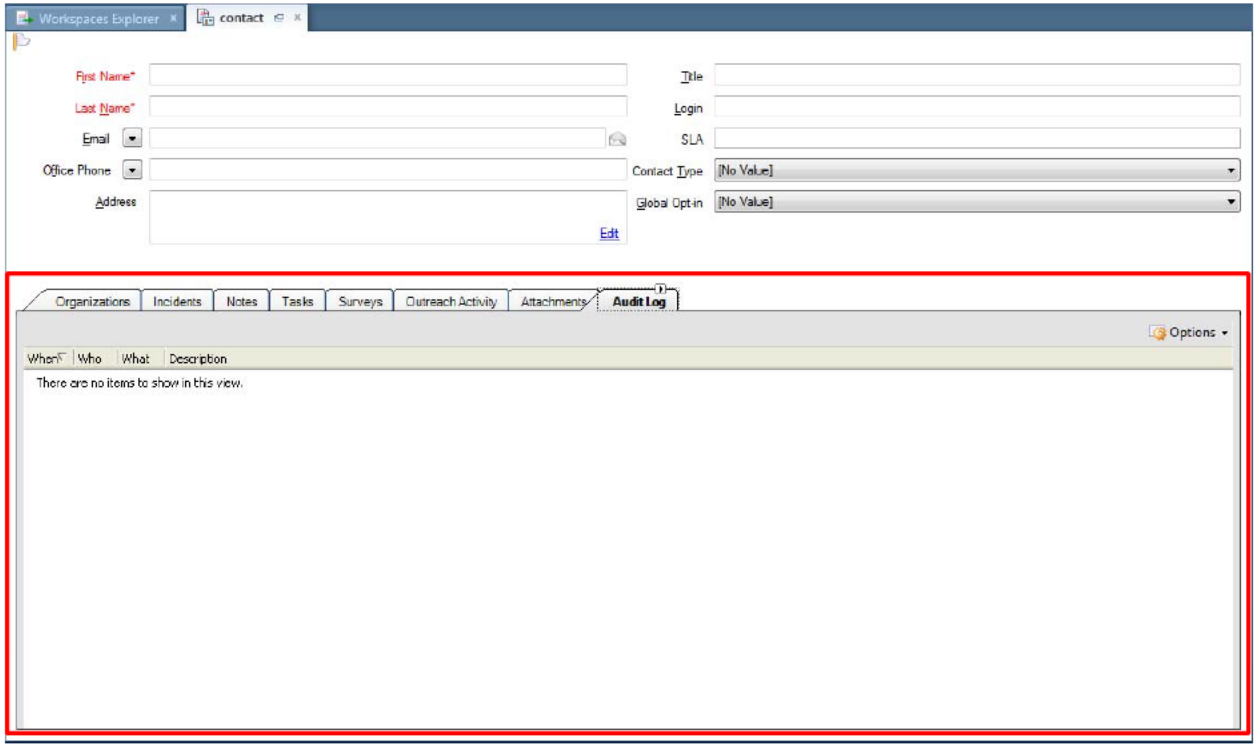
2.2.1.4 Contact Workspace Attachments Tab

Enables staff members to attach files to the contact record. All out of the box functionality will remain for this contact workspace tab.



2.2.1.5 Contact Workspace Audit Log Tab

Displays the history of transactions that have taken place on the contact record. All out of the box functionality will remain for this contact workspace tab.



2.3 Profiles

A profile is the mechanism for controlling access to administration functions and for assigning staff member's specific permissions, default workspaces, a default navigation set, and report access. The following profiles will be created by [redacted]

Profile Name	Assigned Queues	Pull Policy	Description
EC-Tier 1	EC - EA EC - DMHC EC - INT EC - EXT EC - SHOP	Pull 2 at a time (Fill Inbox)	Access to Incident Management
EC-Tier 2	EC - DMHC EC - EA	Manual Assignment	Access to Incident Management

	EC - INT EC - EXT EC - SHOP		
EC-Tier 3	EC - INT EC - EXT EC - SHOP EC - EA EC - DMHC	Pull 2 at a time (Fill Inbox)	Access to Incident Management
EC – Tier 4	EC - EXT EC - INT EC - SHOP EC - EA EC - DMHC	Manual Assignment	Access to Incident Management
EC – Tier 5	EC- SHOP EC - INT EC - EXT EC - EA EC - DMHC	Manual Assignment	Access to Incident Management
EC – Tier 6	EC - RA EC - EXT EC - INT EC - EA EC - SHOP EC - DMHC	Manual Assignment	Access to Incident Management
EC – Tier 7	EC - MGR EC - EA EC - DMHC EC - RA EC - INT EC - EXT EC - SHOP	Manual Assignment	Access to Incident Management Access to Management Report

2.4 Staff Accounts

A staff member authorized to access an Oracle Service Cloud application, including user name, password, profile, group assignment, and email information.

Covered CA admins to create users and decide on temporary password.

2.5 Reports & Dashboards

2.5.1 EC-Manager Navigation Set

Role	Navigation Button	Item Name	Item Description
Manager	Home	Manager Dashboard	This dashboard displays all open incidents assigned to each queue. Analysts will use this dashboard to find and work on incidents. Incidents will be color coded red after open and unassigned for more 14+ calendar days day. - Dashboard Includes: o All Unassigned Incidents by Queue o All Assigned Incidents by Queue o My Inbox
		Notifications	A list of all system generated notifications created for the logged in user.
	Analytics	All Incidents touched by EC	A list of all incidents that were assigned to the EC queue through time.
		Incident Aging Report	A list of all incidents currently assigned to EC sorted by Age. Row text will turn red when incident age exceeds 14 calendar days.

		Service Request Statistics by Category Dashboard	A dashboard comprised of the following reports where Category = EC Type - Incident Activity by Category Displays statistics about incidents associated with a specified date range. Statistics include the number of unassigned, assigned, and resolved incidents, and the number of responses, the RPI per incident, and the number of incidents that were re-assigned. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incident Effectiveness by Category Displays statistics about incidents associated with a certain range of contacts or organizations, grouped by product or category. Statistics include the number of incidents, the RPA, FCRR, number of responses per product or category, and number of solves per product or category. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incidents Created by Category

			Displays all incidents created in a specific time period and groups them by category. You can then drill down to the sub-category level or products within categories. This report is useful for determining the categories most often used when end-users submit an incident. This report also displays all the incidents created within the specified time period sorted by product. This report is useful for determining what products are generating the most questions and what those questions are.

		Service Request Statistics Dashboard	A dashboard comprised of the following reports: - Incident Activity Displays statistics about incidents associated with a specified date range. Statistics include the number of unassigned, assigned, and resolved incidents, and the number of responses, the RPI per incident, and the number of incidents that were re-assigned. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incident Effectiveness Displays statistics about incidents associated with a certain range of contacts or organizations, grouped by product or category. Statistics include the number of incidents, the RPA, FCRR, number of responses per product or category, and number of solves per product or category. Incidents are included in this report if they were created during the date range specified in the report's parameters and were assigned to a group or staff member. - Incident Creation Rate

			Displays statistics of new incidents created per hour of day, day of week, day of month, or month of year. The Incident Creation Rate report is useful for calculating an incident-per-hour/day/month ratio and comparing it against other time periods.
		Agent Performance	Displays statistics about the number of incidents worked on during the specified time period by a staff member or group, and the average time spent working on the incidents. Use this report to determine the work efficiency of staff members and identify the average response time or solution time for each staff member.
		Agent Performance – Incidents not touched	Same as Agent Performance only this shows incidents that have not been edited by the assigned user.
		EC Queue Activity	Reports on how many incidents are in each queue during a specified date range. You can view how many were assigned, resolved, and the number of responses for each incident, all grouped by queue.
		EC Queue Transitions	The report provides information about the number of times incidents transitioned between queues.

		EC Agent Activity	Displays statistics about how agents have handled incidents during a specified time period. Included are statistics on how many incidents agents had assigned to them, how many were resolved, how many responses agents made, and their responses per assignment (RPA). Incidents are included in this report if they were initially assigned, responded to or reassigned during the date range specified in the report's parameters and were assigned to a staff member. Only incidents that were responded to by the agent are included in the report. Incidents that were assigned to the agent, but the agent did not send a response will not be counted.
		Group Activity	Displays by group the statistics about how agents have handled incidents during a specified time period. Included are statistics on how many incidents agents had assigned to them, how many were resolved, how many responses agents made, and their responses per assignment (RPA). Incidents are included in this report if they were initially assigned, responded to or reassigned during the date range specified in the report's parameters and were assigned to a staff member. Only incidents that were responded to by the agent are included in the report. Incidents that were assigned to the agent, but the agent did not send a response will not be counted.
		EC Incidents by Status	Displays all incidents assigned to EC by their Status.
		EC Incidents by Type	Displays all incidents assigned to the EC Queue by their EC Type.

		EC Incidents by Carrier	Displays all incidents assigned to the EC Queue by the Carrier.
		EC Incidents by Action	Displays all incidents assigned to EC Queue by the Action taken.
		EC Incidents by Carrier by Type	Displays all incidents assigned to the EC Queue by Carrier and by EC Type.
		EC Analyst by Type	Displays all incidents assigned by Analyst and by Type.
		EC Analyst by Action	Displays all incidents assigned by Analyst and by Action taken.
		EC Incidents by Queue by Type	Displays all incidents assigned by Queue and by Type.
		EC Incidents by Queue by Action	Displays all incidents assigned by Queue and by Action taken.
		EC Incidents by Carrier by Action	Displays all incidents assigned to EC by Carrier and by Action taken.
		CalHEARS Ticket Data	Displays all incidents that contain CalHEARS Ticket data.
		Reports Explorer	The All Contacts report lists all the contacts in your database. You can filter the contacts or search for specific contact records. Each contact's email address, last name, first name, and opt-in status are displayed.
	Contacts	All Contacts	The All Contacts report lists all the contacts in your database. You can filter the contacts or search for specific contact records. Each contact's email address, last name, first name, and opt-in status are displayed.
	Quick Search	Incident Search	Quickly find an incident by reference number.
		Contact Quick Search	Quickly find a contact record First name, Last name, Email address, Phone, or Primary Case ID.
		Answer Quick Search	Quickly find an Answer by phrase.

2.5.2 Analyst Navigation Set

Role	Navigation Button	Item Name	Item Description
Analyst	Home	Analyst Dashboard	This dashboard displays all open incidents assigned to each queue. Analysts will use this dashboard to find and work on incidents. Incidents will be color coded red after open and unassigned for more 14+ calendar days day. - Dashboard Includes: o All Unassigned Incidents by Queue o My Inbox
		Notifications	A list of all system generated notifications created for the logged in user.
	Contacts	All Contacts	The All Contacts report lists all the contacts in your database. You can filter the contacts or search for specific contact records. Each contact's email address, last name, first name, and opt-in status are displayed.
	Quick Search	Incident Search	Quickly find an incident by reference number
		Contact Quick Search	Quickly find a contact record First name, Last name, or Email address.
		Answer Quick Search	Quickly find an Answer by phrase.

2.5.3 Scheduled Reports

Report	Description	Details	Recipient
Unassigned End of Day	Number and details of unassigned incidents per Queue	- Excel Format - Columns o Subject o Ref # o Case # o Contact Name o Date of Assignment	jennifer.childress@covered.ca.gov mariejean.carrion@covered.ca.gov patricia.dillon-howard@covered.ca.gov

Covered California/CRM

Office of Consumer Protection

OCP

Solution Design Documentation - Phase I

Version 1.0

VERSION CONTROL

Version	Change Description	Modified By	Date
1.0	Initial Draft	[redacted]	
1.1			
1.2			

ASSOCIATED DOCUMENTS

Document	Description	Location
R&R Appeals SDD	[redacted]	[redacted]
HQ Appeals SDD	[redacted]	[redacted]

CONTENTS

1 OVERVIEW 3
1.1 Purpose 3
1.2 Sign Off Approval 3
2 Foundational Workflow 4
3 OCP 4
3.1 Use Cases 4
3.1.1 SCR creates incident: 4
3.1.2 OCP Analyst opens existing incident from OCP queue: 4
3.1.3 OCP Analyst resolves case/incident: 5
3.1.4 Analyst transfers incident: 6
3.2 Profiles 6
3.3 Navigation Set 6
3.4 Staff Accounts 7
3.5 Workspaces 8
3.5.1 Workspace layouts 8
3.6 Workspace Rules 11
3.7 Reports 15
4 Appendix A - Workflow 2
4.1 OCP Incident to Case WF 2

1 OVERVIEW

1.1 Purpose

The purpose of this Solution Design Document (SDD) is to define and illustrate the functional requirements that Covered CA Office of Consumer Protection (OCP) list and Oracle Service Cloud should support. The document also serves as a reference and communication guide for the scope and direction of the implementation that is being completed for OCP. The goal is for both OCP and CRM Admin teams to review and gain agreement on how Administrators, Managers, Analysts, and contacts are going to use the Service Cloud application and to make sure the use cases and requirements are defined up-front so the application can be configured and tested properly.

1.2 Sign Off Approval

_____

_____

_____

_____

2 FOUNDATIONAL WORKFLOW

An analyst will create an incident. Depending on the issue, the analyst will either resolve the issue or escalate for additional support within Covered California. The workflow for most business units is as follows:

1. The analyst opens a new incident
2. Workflow forces the analyst to select a contact from the Oracle Service Cloud application (CRM)
    a. If not found, a new contact is created
3. Once a contact is selected a new incident opens with the contact information populated
4. The analyst captures notes, sets a Type and either processes the incident or re-assigns the incident to another business unit.

3 OCP

3.1 Use Cases

3.1.1 SCR creates incident:

- Creates new incident
- Select or created contact
- Enters:
    - Complainant (will auto-populate with contact name)
    - Subject
    - Type (Call Type): Consumer Protection / Fraud
        - Queue with auto-change to Office of Consumer Protection
        - Status will stay Open
        - Assigned will auto update to [No Value]
        - Add notes/messages, as needed
- Save & Close
- Incident will populate on the OCP queue report

3.1.2 OCP Analyst opens existing incident from OCP queue:

- Open incident from OCP queue report list
- Determine case type, update Case Details Tab

    - IF PO Referral = Yes THEN
        - Analyst contacts PO office
        - Ticket number is generated by PO office and shared with analyst
        - Enter Notes as needed
        - Status changed to Closed
        - Save & Close

    - IF ISO Referral = Yes THEN
        - Analyst contacts ISO office

        - Ticket number is generated by ISO office and shared with analyst
        - Enter Notes as needed
        - Status changed to Closed
        - Save & Close

    - IF OCP Case = Yes THEN
        - Enter type of issue/allegation
        - Click the Create OCP Case button
            - Reselect the contact which will auto-populate the Complaintant field
            - Enter Suspect(s) and Victim(s) if known
            - If Type of Issue/Alligation is "Program Complaint" THEN
                - Type of Program Complaint drop-down menu will appear with the following choices:
                - 1095A Issues
                - Website Concerns
                - Health Plan Concern
                - Password Reset
                - Other
            - Enter Date Received
            - To OCP Internal, select channel:
                - Email
                - Other
                - Phone
                - Mail
                - Queue
            - Enter the assigned OCP Case Investigation #
                - Format YYYY-OCP-####
                - Numbers in sequence will be managed and assigned external to CRM. Not auto-generated.
            - Enter Notes as needed

3.1.3 OCP Analyst resolves case/incident:

- From Case workspace
    - Select Case Result
        - Fraud
        - Non-Fraud
    - Status = Closed
    - Save
        - Case workspace will close & the Incident workspace will open
            - Enter Notes as needed
            - Save

3.1.4 Analyst transfers incident:

- If analyst determine the incident does not warrant a case or was referred to OCP in error THEN
  - Change Type as appropriate
  - Change Status to Transferred
  - Select Assigned
  - Add Private Messages as necessary
  - Save & Close

3.2 Profiles

- OCP Analyst
- OCP Manager (same as analyst but has Analytics)

3.3 Navigation Set

OCP Analyst

Application Menu	Home	Incidents	Contacts	Appeal	Quick Search
New Incident	OCP Dashboard (default)	Incidents Search	Contacts Search	Appeal Search	Contact
New Contact	.My Incidents 2.0	OCP Incidents		My Open Appeals by Queue, Status or Type	Case
	.My Inbox 3.5			My Closed Appeals by Disposition, Queue or Type	Incident
	Notifications				Appeal

OCP Manager Navigation Set

Application Menu	Home	Incidents	Contacts	Appeal	Quick Search	Analytics
New Incident	OCP Dashboard (default)	Incidents Search	Contacts Search	Appeal Search	Contact	...
New Contact	.My Incidents 2.0	OCP Incidents		My Open Appeals by Queue, Status or Type	Case	
	.My Inbox 3.5			My Closed Appeals by Disposition, Queue or Type	Incident	
	Notifications				Appeal	

3.4 Staff Accounts

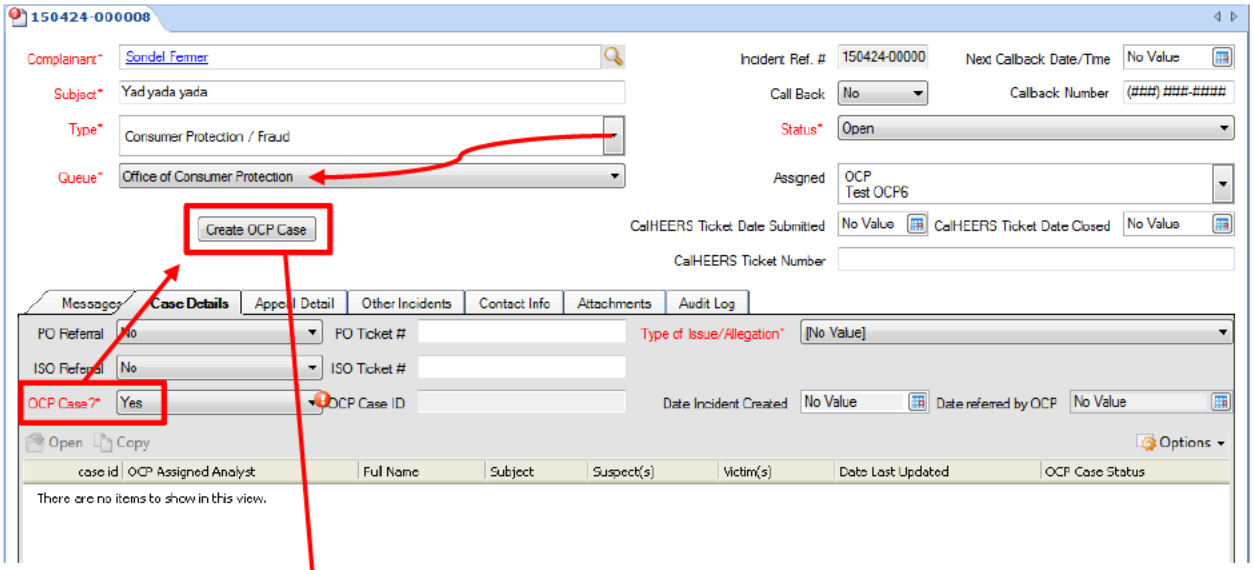
Name	Profile
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]
[redacted]	[redacted]

3.5 Workspaces

3.5.1 Workspace layouts

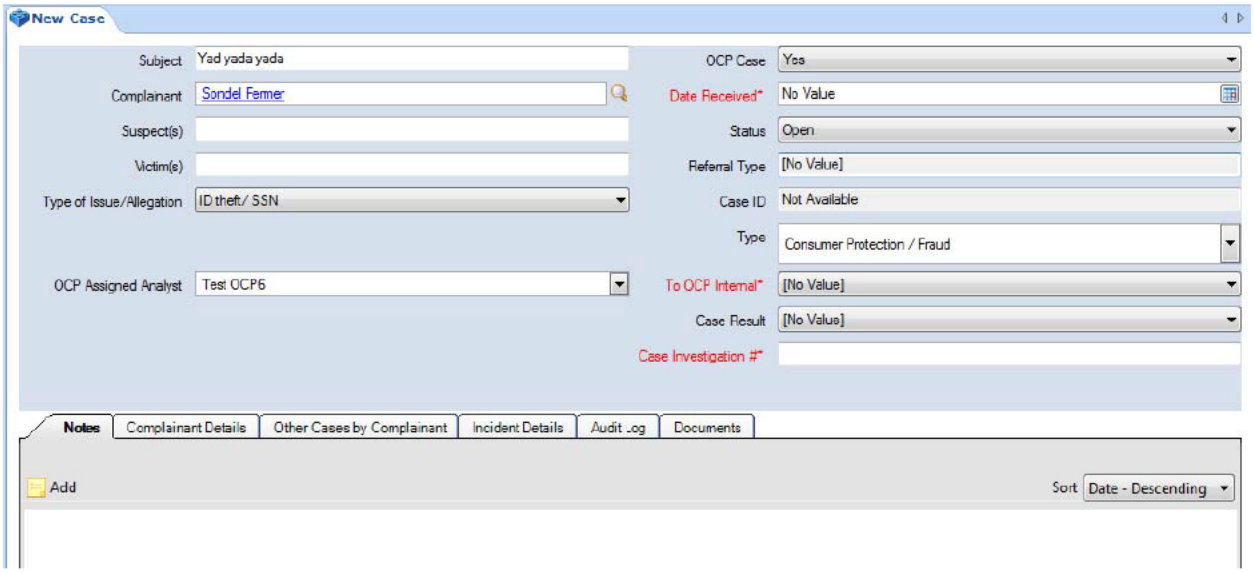
OCP Incident WS with Appeals

Sample below for an OCP Case



Case WS

When "Create OCP Case" button clicked:



Case WS – Complaint Details Tab

Notes | **Complainant Details** | Other Cases by Complainant | Incident Details | Audit Log | Documents

First Name [redacted]
Last Name
Email
DoB
SSN Last 4 ####
Case ID
Application ID

Case WS – Other Cases by Complainant Tab

Notes | Complainant Details | **Other Cases by Complainant** | Incident Details | Audit Log | Documents

Add | Open | Print | Copy | Delete | Remove | Email | Options

Compla	Full Name	Victim(s)	Suspect(s)	Date Created	Type of Iss	OCP Case Status	Case Result	Incident	Action

There are no items to show in this view.

Case WS – Incident Details Tab

Notes | Complainant Details | Other Cases by Complainant | **Incident Details** | Audit Log | Documents

Reference #	150424-000008	Status*	Open
Incident Queue	Office of Consumer Protection	Date Created	04/24/2015 01:47 PM
Assigned Analyst	Test OCP6	Date Last Updated	04/24/2015 01:47 PM
ISO Referral	No	ISO Ticket #	
PO Referral	No	PO Ticket #	
CalHEERS Ticket Number		CalHEERS Ticket Date Submitted	No Value
		CalHEERS Ticket Date Closed	No Value

Case WS – Audit Log Tab

Notes | Complainant Details | Other Cases by Complainant | Incident Details | **Audit Log** | Documents

Date Created	No Value	Date Last Updated	No Value
Created By		Updated By	
Closed Date	No Value	Date Assigned	No Value

Options

When	Who	What	Source

There are no items to show in this view.

Case WS – Documents Tab

Notes | Complainant Details | Other Cases by Complainant | Incident Details | Audit Log | **Documents**

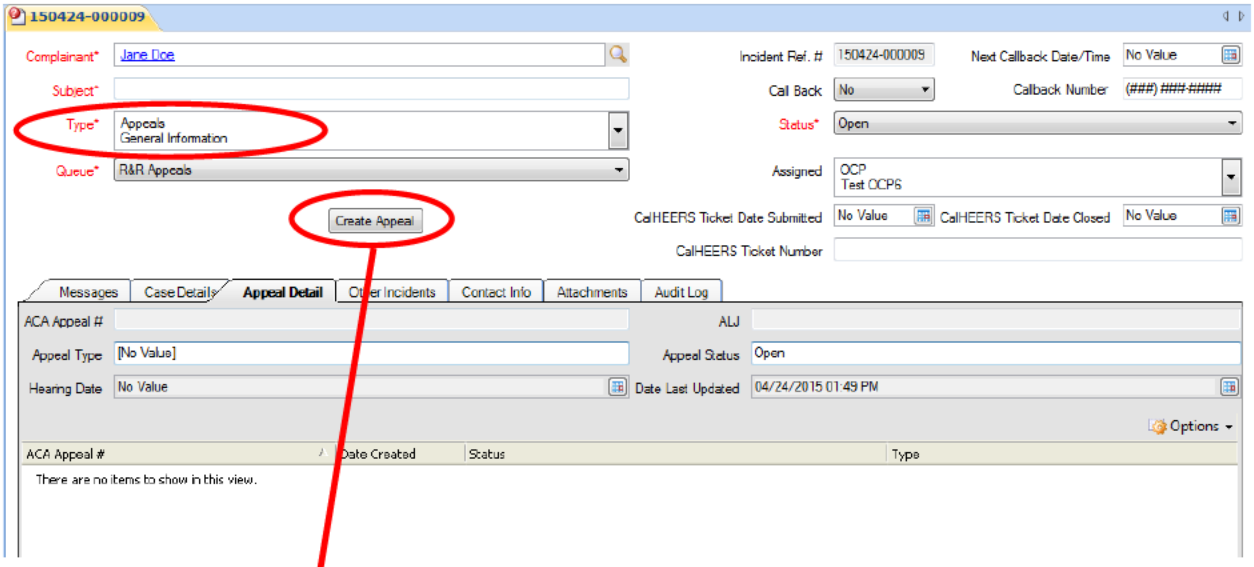
Add Files | Open | Download | Properties | Delete | Options

Name	Size	Created	Updated	Description	Action

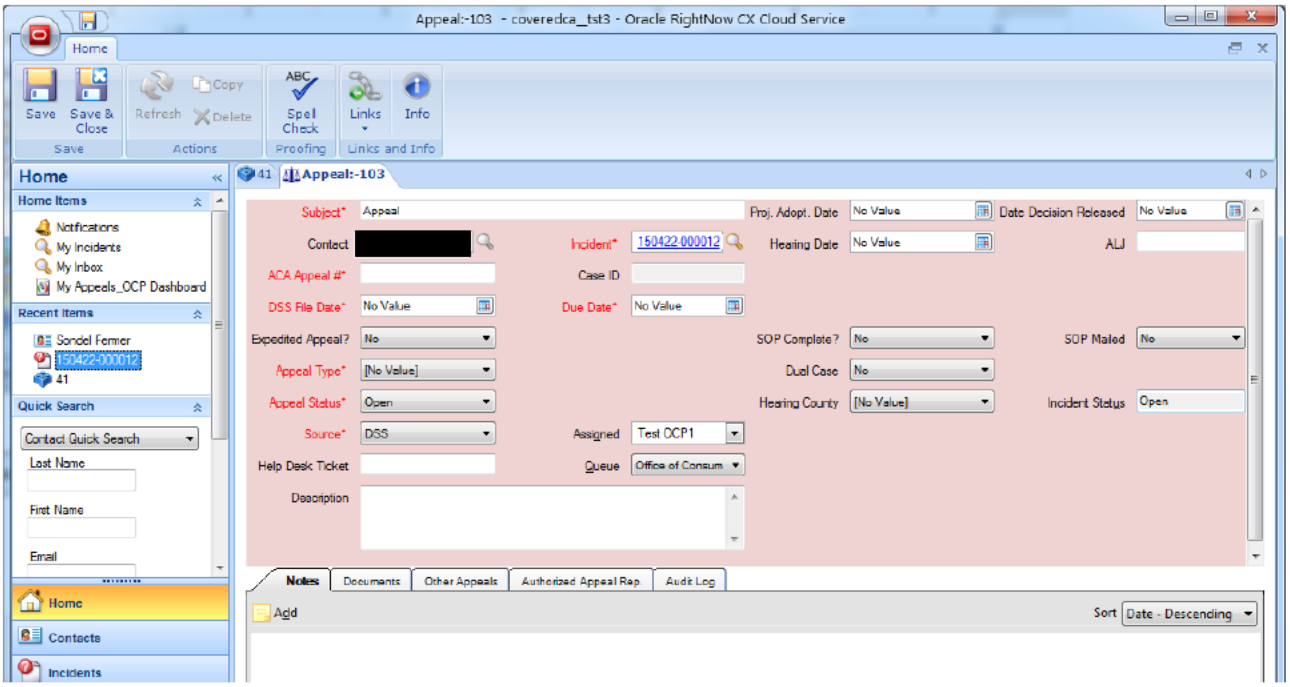
There are no items to show in this view.

OCP Incident WS with Appeals

Sample below for an Appeal



Appeals WS



NOTE: Refer to Appeals SDD for complete breakdown of the Appeals workspace and workflow.

3.6 Workspace Rules

OCP Incident WS with Appeals

Name	When	If	Then	Else
Queue Exclusions	The editor loads		Set Queue to exclude 1095, 1095 Dispute, Follow Up - T1 English, Follow Up - T1 Spanish, Lang Support - Cantonese, Lang Support - Vietnamese, Lang Support - Korean, Lang Support - Other, Web - Email English, Web - Request Form English, Web - Email Spanish, Web - Request Form Spanish, Contra Esca - English Sup, Contra Esca - Spanish Sup, Contra Esca - Manager, Contra Esca - Site Manager, Fresno Esca - Sup Prog Tech III Eng, Fresno Esca - Sup Prog Tech III Spanish, Fresno Esca - SSM I, Fresno Esca - SSM II, Sac Esca - Sup Prog Tech III Eng, Sac Esca - Sup Prog Tech III Spanish, Sac Esca - Sup Prog Tech III Lang, Sac Esca - SSM I, Sac Esca - SSM II, Back Office - QAQC Analyst, Back Office - T1 Ext Coord, Hotline, Back Office - T2 Research, Back Office - T2 Ext Coord, Back Office - Supervisor, Support Service - T1 Mail, Support Service - T2 Mail, Support Service - T1, CRT, General Queue, SHOP Tier 1 English, SHOP Tier 1 Spanish, SHOP Email English, SHOP Request Form English, SHOP Email Spanish, SHOP Request Form Spanish, SHOP Mail/Fax, SHOP English Team Lead, SHOP Spanish Team Lead, SHOP Other Languages, SHOP Manager, SHOP Command Center, SHOP Sales Support, SHOP Complaints - English, SHOP Complaints - Spanish, SHOP COBRA, SHOP Financial Management, SHOP LMS, CEC General English, CEC General Spanish, CEC Manager, CEC Team Lead, Complaints - English, Complaints - Spanish, BO Agent, BO SHOP, Questions-Comments-Web, Call Back INDIVIDUAL, Call Back SHOP, Outreach Mailbox, Access to Care, Reinstatement, Report a Change (Baby or Adoption), Report a Change (All Other), Renewal, R&R Appeals, HQ Hearings, External Affairs, EC-EA, SCR, SCR Lead, EC-EXT, EC-DMHC, EC-SHOP, EC-RA, EC-MGR menu items	
Assigned To Exclusions	The editor loads		Set Assigned to exclude Disabled Accounts, Accenture, CalHEERS Tech Ops, Rancho Cordova - Disabled Accounts, Rancho Cordova - Back Office, SHOP - Disabled Accounts, CEC - Disabled Accounts, Eventus, Testers, Individual - Training, Demo, Temp, SSO Test, SHOP Test, SHOP - Training, CEC - Training, Temporay disabled, CalHEERS, Accenture - 45n, Amber Leaf, Covered CA HQ, HQ Marketing, Event Management menu items	
Status Exclusions	The editor loads		Set Status to exclude Pending Fulfillment, Partial Fulfillment, Fulfillment Error, Updated, Solved by EC for EA, EC - In Progress menu items	
Hide Create Appeal Button	The editor loads		Hide Create Appeal Button	
Hide Create Case Button	The editor loads		Hide Create OCP Case Button	
Show Create Case Button	The editor loads OR Category changes OR OCP Case changes	Category in list Consumer Protection / Fraud AND OCP Case equals Yes	Show Create OCP Case Button	
Focus Case Details tab	The editor loads OR Category changes	Category in list Consumer Protection / Fraud	Focus Case Details tab	

Set R+R Appeals Queue	Category changes	A new record is being created AND Category in list Appeals	Set Queue to R&R Appeals	
Set OCP Queue	Category changes	A new record is being created AND Category in list Consumer Protection / Fraud	Set Queue to Office of Consumer Protection	
Show Tab	The editor loads	The logged in account's profile in list 1 CoveredCA Full Admin, Amberleaf Full Admin, Full Admin - katie	Show Rules Hit by Incident tab	
Type of Issue Req'd	The editor loads OR OCP Case changes	OCP Case equals Yes	Make Type of Issue required	Make Type of Issue optional
Type of Program Complaint Req'd	The editor loads OR Type of Issue changes	Type of Issue equals Program Complaint	Make Type Of Program Complaint required AND Show Type Of Program Complaint	Make Type Of Program Complaint optional AND Hide Type Of Program Complaint
OCP Case Event	Create OCP Case Button is clicked		Fire OCPCase named event AND Execute Save	
Hide R+R and E+E queue if type is not appeals	Category changes	A new record is being created AND Category not in list Appeals	Set Queue to exclude 1095, 1095 Dispute, Follow Up - T1 English, Follow Up - T1 Spanish, Lang Support - Cantonese, Lang Support - Vietnamese, Lang Support - Korean, Lang Support - Other, Web - Email English, Web - Request Form English, Web - Email Spanish, Web - Request Form Spanish, Contra Esca - English Sup, Contra Esca - Spanish Sup, Contra Esca - Manager, Contra Esca - Site Manager, Fresno Esca - Sup Prog Tech III Eng, Fresno Esca - Sup Prog Tech III Spanish, Fresno Esca - SSM I, Fresno Esca - SSM II, Sac Esca - Sup Prog Tech III Eng, Sac Esca - Sup Prog Tech III Spanish, Sac Esca - Sup Prog Tech III Lang, Sac Esca - SSM I, Sac Esca - SSM II, Back Office - QAQC Analyst, Back Office - T1 Ext Coord, Back Office - T2 Research, Back Office - T2 Ext Coord, Back Office - Supervisor, Support Service - T1 Mail, Support Service - T2 Mail, Support Service - T1, CRT, General Queue, SHOP Tier 1 English, SHOP Tier 1 Spanish, SHOP Email English, SHOP Request Form English, SHOP Email Spanish, SHOP Request Form Spanish, SHOP Mail/Fax, SHOP English Team Lead, SHOP Spanish Team Lead, SHOP Other Languages, SHOP Manager, SHOP Command Center, SHOP Sales Support, SHOP Complaints - English, SHOP Complaints - Spanish, SHOP COBRA, SHOP Financial Management, SHOP LMS, CEC General English, CEC General Spanish, CEC Manager, CEC Team Lead, Complaints - English, Complaints - Spanish, BO Agent, BO SHOP, Questions-Comments-Web, Call Back INDIVIDUAL, Call Back SHOP, Outreach Mailbox, Access to Care, Reinstatement, Report a Change (Baby or Adoption), Report a Change (All Other), Renewal, R&R Appeals, HQ Hearings, External Affairs, EC-EA, SCR, SCR Lead, EC-EXT, EC-DMHC, EC-SHOP, EC-RA, EC-MGR menu items	
show appeals button	Category changes OR Assigned changes OR The editor loads	Category in list Appeals AND Status not in list Closed AND ACA Appeal # is null	Show Create Appeal Button	
Focus Appeal Details tab	The editor loads OR Category changes	Category in list Appeals	Focus Appeal Detail tab	
Show Appeals Button	The editor loads	An existing record is being edited AND Category in list Appeals AND Appeal is null	Show Create Appeal Button	

Hide Appeal Button	The editor loads	An existing record is being edited AND ID is not null	Hide Create Appeal Button	
Appeal Event	Create Appeal Button is clicked		Fire Appeal named event AND Execute Save	
Status of transferred, set new queue	Status changes	Status equals Transferred	Set Queue to No Value AND Make Queue required AND Set Assigned to No Value AND Make Assigned required	Set Queue to Office of Consumer Protection
Closed Status Rule	Status changes	Status equals Closed	Set Assigned to Logged in account	
Assigned To - Open	Status changes OR Category changes OR The editor loads	Status equals Open	Set Assigned to Logged in account	
Escalation: Appeals	The editor loads OR Status changes OR Category changes	Status equals Escalated AND Category in list General Information, General Information, Request Question, Status	Set Queue to exclude 1095, 1095 Dispute, Follow Up - T1 English, Follow Up - T1 Spanish, Lang Support - Cantonese, Lang Support - Vietnamese, Lang Support - Korean, Lang Support - Other, Web - Email English, Web - Request Form English, Web - Email Spanish, Web - Request Form Spanish, Contra Esca - English Sup, Contra Esca - Spanish Sup, Contra Esca - Manager, Contra Esca - Site Manager, Fresno Esca - Sup Prog Tech III Eng, Fresno Esca - Sup Prog Tech III Spanish, Fresno Esca - SSM I, Fresno Esca - SSM II, Sac Esca - Sup Prog Tech III Eng, Sac Esca - Sup Prog Tech III Spanish, Sac Esca - Sup Prog Tech III Lang, Sac Esca - SSM I, Sac Esca - SSM II, Back Office - QAQC Analyst, Back Office - T1 Ext Coord, Hotline, Back Office - T2 Ext Coord, Back Office - Supervisor, Support Service - T1 Mail, Support Service - T2 Mail, Support Service - T1, CRT, General Queue, SHOP Tier 1 English, SHOP Tier 1 Spanish, SHOP Email English, SHOP Request Form English, SHOP Email Spanish, SHOP Request Form Spanish, SHOP Mail/Fax, SHOP English Team Lead, SHOP Spanish Team Lead, SHOP Other Languages, SHOP Manager, SHOP Command Center, SHOP Sales Support, SHOP Complaints - English, SHOP Complaints - Spanish, SHOP COBRA, SHOP Financial Management, SHOP LMS, CEC General English, CEC General Spanish, CEC Manager, CEC Team Lead, Complaints - English, Complaints - Spanish, BO Agent, BO SHOP, Office of Consumer Protection, Questions-Comments-Web, Call Back INDIVIDUAL, Call Back SHOP, Outreach Mailbox, Access to Care, Reinstatement, Report a Change (Baby or Adoption), Report a Change (All Other), Renewal, External Affairs, EC-EA, SCR, SCR Lead, EC-EXT, EC-DMHC, EC-SHOP, EC-RA, EC-MGR menu items AND Set Queue to Back Office - T1 Research	
Callback Date/Time Required	Call Back changes	Call Back equals Yes	Make Callback Date/Time required	Make Callback Date/Time optional
Set Date referred by OCP	Status changes	Status equals Referred by OCP	Set Date Referred by OCP to the time of the action plus 0 minute(s)	
If appeals make ocp fields read only	Category changes	Category in list Appeals	Make Type of Issue read only AND Make Type Of Program Complaint read only AND Make OCP Case read only	Make OCP Case editable AND Make Type of Issue editable AND Make Type Of Program Complaint editable
Hide OCP Button	OCP Case changes	OCP Case equals No	Hide Create OCP Case Button	
Hide OCP Button	The editor loads	An existing record is being edited AND ID is not null	Hide Create OCP Case Button	

Case WS Rules

Name	When	If	Then	Else
Set OCP Case Status to Open	The editor loads OR Status changes	A new record is being created	Set Status to Open	
Set OCP Queue	The editor loads OR Status changes	Status equals Open	Set Queue to Office of Consumer Protection	
Set Assigned to Logged In	The editor loads		Set OCP Assigned Analyst to Logged in account	
Show Type of Complaint	The editor loads OR Type of Issue changes	Type of Issue equals Program Complaint	Show Type Of Program Complaint AND Make Type Of Program Complaint required	Hide Type Of Program Complaint
Make Referral Type Required	Status changes	Status equals Referred	Make Referral Type editable AND Make Referral Type required	Make Referral Type optional
Set Referral type to No Value	Status changes	Status in list Open, Pending - AGPA, Pending - Mgr, Closed	Set Referral Type to No Value	
Referred to EC	Referral Type changes	Referral Type equals Referred Internal: Ext Coordination	Set Queue to EC-INT AND Set Status to Referred by OCP AND Set Assigned to No Value	
Referred to R+R	Referral Type changes	Referral Type equals Referred Internal: R&R Appeals	Set Queue to R&R Appeals AND Set Status to Referred by OCP AND Set Assigned to No Value	
Referred to E+E	Referral Type changes	Referral Type equals Referred Internal: HQ Appeals	Set Queue to HQ Hearings AND Set Status to Referred by OCP AND Set Assigned to No Value	
Referred to Other: Set Queue	Referral Type changes	Referral Type equals Referred Internal: Other	Set Queue to No Value AND Make Queue editable AND Make Queue required AND Set Status to Referred by OCP AND Set Assigned to No Value	
Referred to DHCS	Referral Type changes	Referral Type equals Referred External: DHCS A&I	Set Queue to Office of Consumer Protection AND Set Status to Referred by OCP AND Set Assigned to Logged in account	
Referred to Dept. of Ins.	Referral Type changes	Referral Type equals Referred External: Dept. of Insurance	Set Queue to Office of Consumer Protection AND Set Status to Referred by OCP AND Set Assigned to Logged in account	
Referred to Other	Referral Type changes	Referral Type equals Referred External: Other	Set Queue to Office of Consumer Protection AND Set Status to Referred by OCP AND Set Assigned to Logged in account	
Referred to ISPO	Referral Type changes	Referral Type equals Referred Internal: ISPO	Set Queue to Office of Consumer Protection AND Set Status to Referred by OCP AND Set Assigned to Logged in account	

3.7 Reports

Open Appeals LINKED – OCP

- Report ID (tst3): 101591
- Report ID (prod):_____

Open Incidents by Queue - OCP

- Report ID (tst3): 101588
- Report ID (prod):_____

Open Incidents LINKED - OCP

- Report ID (tst3): 101589
- Report ID (prod):_____

Contact Search .OCP

- Report ID (tst3): 101579
- Report ID (prod):_____

Contact by OCP Case

- Report ID (tst3): 101564
- Report ID (prod):_____

Incident Case - OCP

- Report ID (tst3): 101546
- Report ID (prod):_____

Contact Search – OCP

- Report ID (tst3): 101545
- Report ID (prod):_____

OCP Incidents

- Report ID (tst3): 101543
- Report ID (prod):_____

Incidents by Queue - OCP

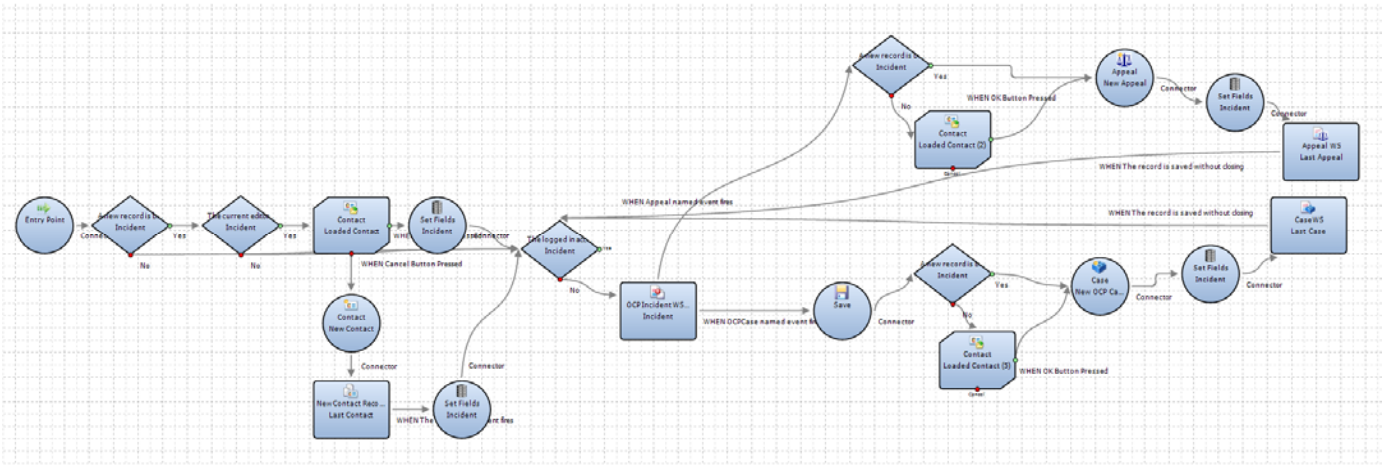
- Report ID (tst3): 101541
- Report ID (prod):_____

Contact by OCP _Case

- Report ID (tst3): 30224
- Report ID (prod):_____

4 APPENDIX A - WORKFLOW

4.1 OCP Incident to Case WF



Business Requirements Document (BRD)

CR CC0115

Ombudsman CRM (Phase I)

CRM – Service Cloud
Business Requirements Document (BRD)

Table of Contents

Version Control 3

Revision History 3

Executive Summary 3

Charter 3

Overview 3

Background 3

Objectives 4

Scope 4

Included in Scope 4

Excluded from Scope 4

Constraints 4

Stakeholders 4

Business Requirements 5

Workspace Rules 6

Training Requirements 6

Appendix 7

Ombudsman Contact Workspace 7

Ombudsman Incident Workspace 7

Ombudsman Case Workspace 9

Version Control

Revision History

Version #	Date	Responsibility (Author)	Description
1.0	9/12/2017	[redacted]	[redacted]
1.1	11/6/2017	[redacted]	

Executive Summary

Charter

Located on SharePoint:

[redacted]

Overview

Provide the Ombudsman's Office with customer relations tool to track incoming correspondence call and complaints trends.

Background

New office being created to support appeals and consumer complaints.

The Ombudsman is a friendly advisor to individuals with unresolved complaints and acts to ensure a fair resolution of the situation.

The office operates independently of the consumer and program. Essentially, the Ombudsman and their staff act as unbiased advocates to help the public resolve disputes.

The Ombudsman investigates complaints, researches and clarifies facts, and seeks mutually workable outcomes.

Ombudsman Affairs Unit Workload:

- Conducts independent investigation and resolution of complaints.
- Reviews and resolves escalated complaints from the legislature and advocacy groups.
- Provides information, answer questions, and identify staff and resources to address consumer issues.
- Assists with urgent Covered California enrollment and disenrollment issues.
- Advises executive leadership of complaint trends.

Appeals Fulfillment Unit Workload:

- Implements Administrative Law Judge decisions on Covered California appeal cases by:
- Interacting with consumers;
- Working closely with health plans, program partners and Covered CA program areas; and
- Using CalHEERS to make case changes.

Both units will be cross-trained to take incoming calls and process ALJ decisions

Objectives

- Track incoming correspondence
- Protect/hide Ombudsman specific correspondence from other business units
- Ability to transfer incidents to appropriate business unit
- Scheduled and Adhoc reports
    - Incoming
    - Completed
    - Aging
    - Trends

Scope

Included in Scope

Implement communication tracking tool for Ombudsman team. Define business rules and implement requirements. This will be rolled out in a phased approach, this document will focus on Phase I.

Excluded from Scope

Future phases.

Constraints

- I.T. Resources
- Changes that will impact other business area workspaces or global lists within the CRM.

Stakeholders

Please list and describe stakeholders who act within the business in carrying out business use cases.

Department / Position	Internal / External	General Impact on Project

Business Requirements

#	Requirement Text	Value or Rule	Notes
3	The system shall be able to identify the type of complainant.	i.e.., consumer, advocate, authorize rep(agent, parent) -	Will need to verify the originator of complaints on the behalf of the consumer are authorized to make the compliant.
4	The system shall be able to track applicants' case information including intake and comments.	If applicable	Public and Private
5	The system shall be able to generate and respond via emails via multiple work flows	Multiple emails - acknowledge receipt, closed, Thank you...etc.	Possible but not secure
6	The system shall be able to accept documents submitted from internal and external sources.	Will need to comply with ISO document type	Documents sent via secure email/regular mail to be scanned and submitted into CRM by the Ombudsman Analyst - What happens with External
7	The system shall be able to uniquely generate an identification for each individual case.	Unique ID numbers are auto generated in CRM	
8	The system shall be able to handle multiple workflows.	SLA and status notification	
9	The system shall have the ability to identify consumer preference for communication	i.e., - email, phone, fax , postal mail	
10	The system shall have the ability to extract data for reporting and escalations		
15	OMB Case details only visible to approved OMB users	Documentation and notes will reside in CRM. Access to Appeals Cases in CRM must be approved by the Appeals Service Center Manager.	

Workspace Rules

Name	When	If	Then	Else
New Record onLoad events	The editor loads	A new record is being created	Set Category to Ombudsman AND Set Queue to Ombudsman AND Set Assigned to Logged in account AND Set Status to Ombudsman - In Progress	
Set available Queues	The editor loads		Set Queue to include Hotline, Appeals - 2nd Level, PSU, Ombudsman, Sales CCSB Tier 2, Office of Consumer Protection, R&R Appeals, ER-INT (formerly EC), SCR Lead, SCR Supervisor menu items	
Set available Categories (Types)	The editor loads		Set Category to include Ombudsman menu items	
Set available Assigned User Groups	The editor loads		Set Assigned to include Fresno, Rancho Cordova, Rancho Cordova - Back Office, Rancho Cordova - Hotline, R&R Appeals, External Resolution - Rancho Cordova, Surge, Ombudsman menu items	
Set available Statuses	The editor loads		Set Status to include Open, Transferred, Closed, Ombudsman - In Progress menu items	
Hide OMB button on edit	The editor loads	An existing record is being edited	Hide Create Ombudsman Case Button	
Show OMB button on NEW	The editor loads OR Category changes	Category in list Ombudsman AND A new record is being created	Show Create Ombudsman Case Button	Hide Create Ombudsman Case Button
Set Default Mailbox	The editor loads		Set Mailbox to Individual-coveredca	
If status changes TO Closed	Status changes	Status equals Closed	Set Status to Closed	

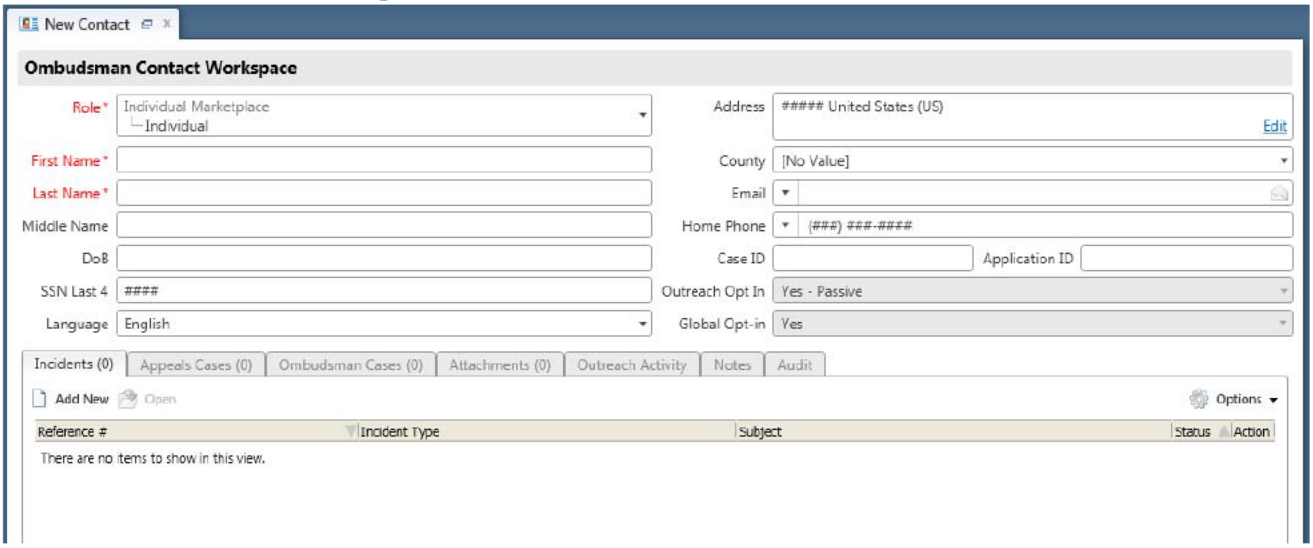
Training Requirements

The Ombudsman team will be responsible to create user procedures and training scripts.

Ombudsman team to coordinate with CCU for future training needs.

Appendix

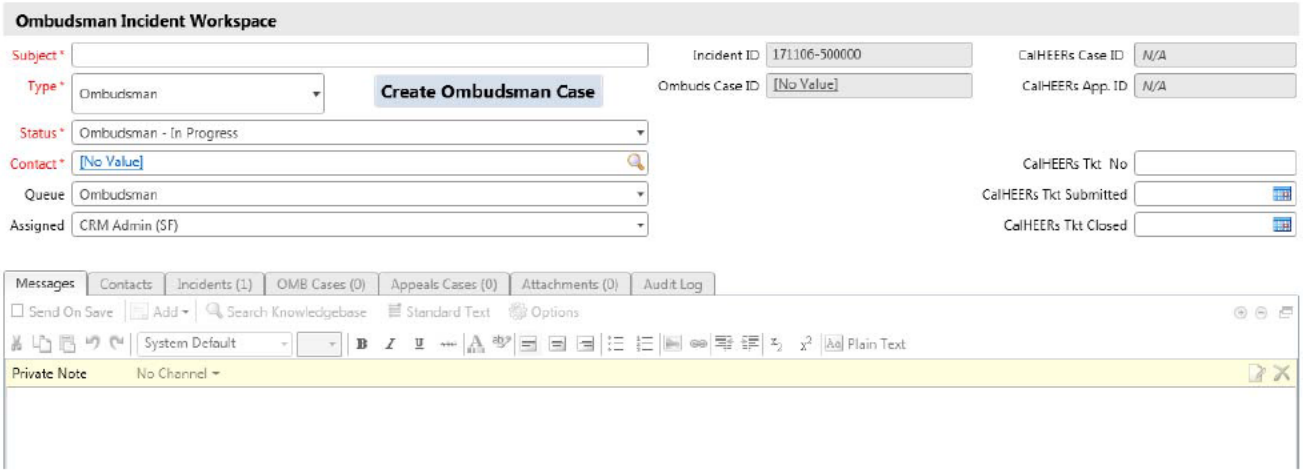
Ombudsman Contact Workspace



Ombudsman Contact Workspace Default Values:

Field Label	Value
Role	Individual Marketplace > Individual
Language	English
Outreach opt-in	Yes-Passive
Global Opt-in	Yes

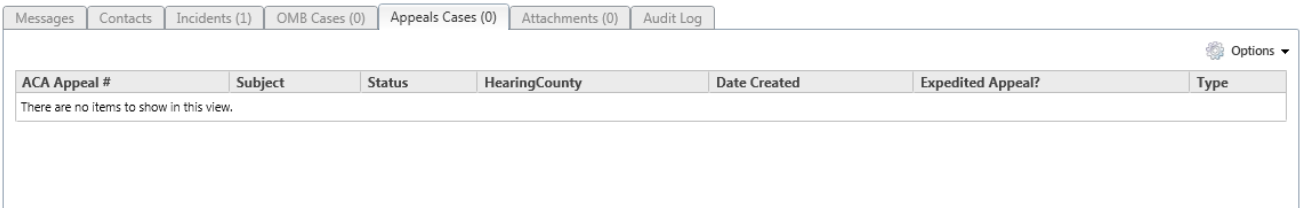
Ombudsman Incident Workspace

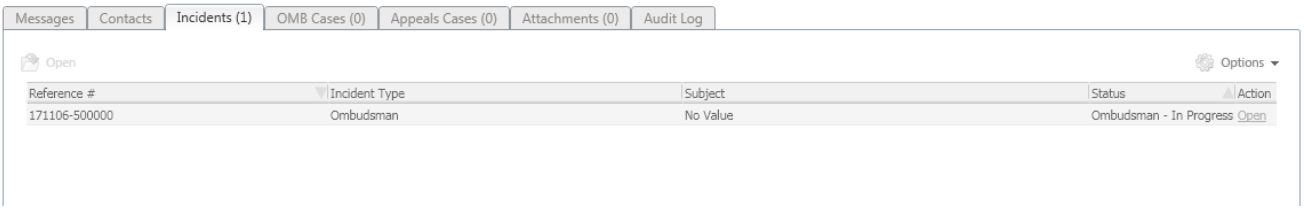


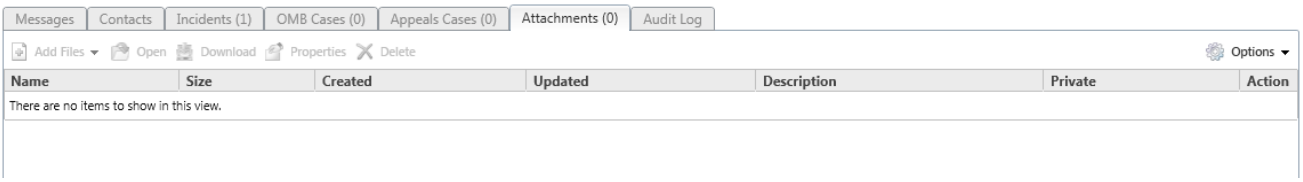
Ombudsman Incident Workspace Default Values:

Field Label	Value
Type	Ombudsman
Queue	Ombudsman

Outreach opt-in	Yes-Passive
Assigned	Current User
Incident ID	Not Ombudsman specific, auto populated to the next available sequential number. Format: YYMMDD-######
Ombuds Case ID	This will auto-populate once a Case is created and saved. Increments sequentially. Format: ##







Ombudsman Case Workspace

OMB Case WS

Ombudsman CASE Workspace

Subject*		Incident ID	
Contact		Ombudsman Case ID	
Date Received*	No Value	Queue	[No Value]
Case Type*	[No Value]	Date Last Updated	No Value
Source*	[No Value]	Assigned	[No Value]
Case Status*	[No Value]	Dual Case	No
Incident Status	Open	County of Action	[No Value]
Resolution	[No Value]	CalHEERS Ticket Number	

Notes | Attachments | Incidents | Appeals Cases | OMB Cases | Audit Log

PLEASE NOTE: These notes can only be seen by Ombudsman user profiles.

Add Sort Date - Descending

Notes | **Attachments** | Incidents | Appeals Cases | OMB Cases | Audit Log

PLEASE NOTE: These file attachments can only be seen by Ombudsman user profiles.

Add Files Open Download Properties Delete Options

Name	Size	Created	Updated	Description	Action

There are no items to show in this view.

Notes | Attachments | **Incidents** | Appeals Cases | OMB Cases | Audit Log

Open Options

Reference #	Incident Type	Subject	Source	Status

There are no items to show in this view.

Notes | Attachments | Incidents | **Appeals Cases** | OMB Cases | Audit Log

Open Add New Copy Delete Options

ACA Appeal #	Subject	Status	County of Action	Date Created	Expedited Appeal?	Appeal Type

There are no items to show in this view.

Notes | Attachments | Incidents | Appeals Cases | **OMB Cases** | Audit Log

Open Options

OMB ID	Subject	Status	Date Created	Case Type	Action

There are no items to show in this view.

OMB Incident Workspace

OMB Incident WS

Subject*
Type* [No Value]
Contact*
Status* Open
Queue* [No Value]
Assigned [No Value]

Incident Ref. #
Case ID
Application ID
ACA Appeal #

CalHEERS Tkt No.
CalHEERS Tkt Submitted No Value
CalHEERS Tkt Closed No Value

Create OMB Case
Open OMB Case

Messages | Details | Contacts | Appeals by Contact | Incidents by Contact | Attachments | Audit Log | Closed Incident Add-In | Rules Hit by Incident

Send On Save | Add | SmartAssistant | Search Knowledgebase | Standard Text | Options

11 | Plain Text

OMB Case Workspace

Workspaces/Workflows Explorer | OMB Case WS

Subject*
Contact
OMB Date Received* No Value
OMB Case Type* [No Value]
OMB Case Status* [No Value]

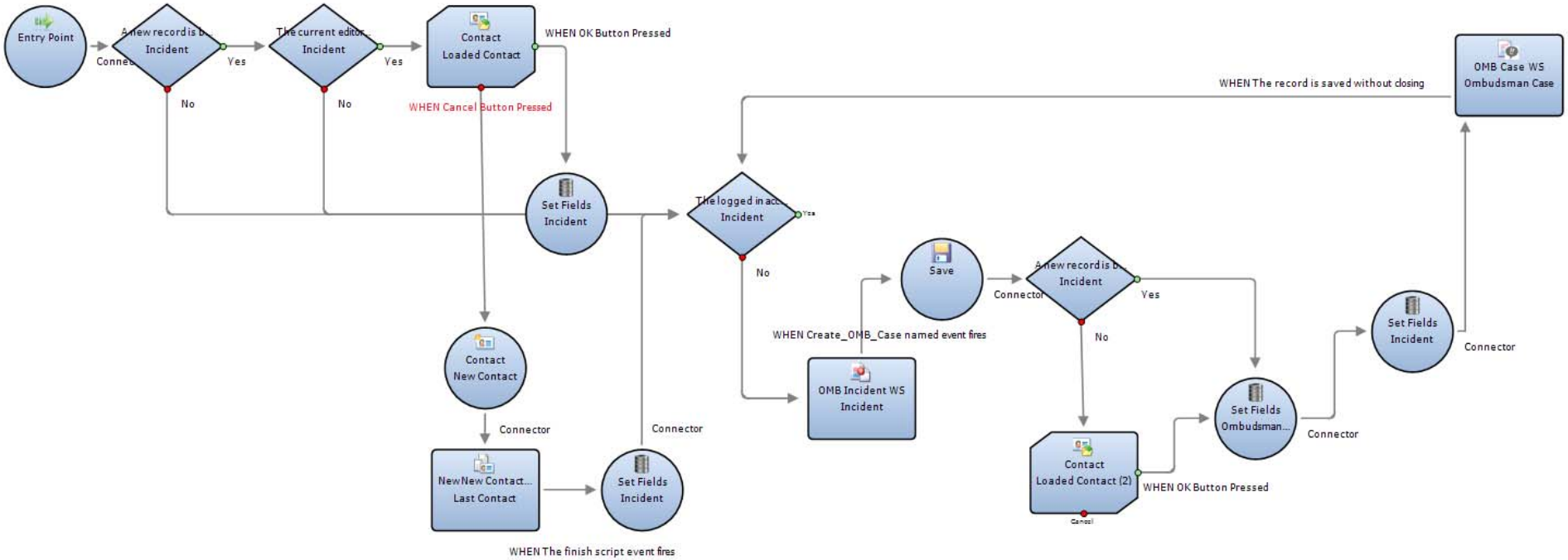
Incident ID
Queue [No Value]
Status Open
Source [No Value]

Notes | Documents | Incidents / Appeals | Audit Log

Add Files | Open | Download | Properties | Delete | Options

Name	Size	Created	Updated	Description	Action

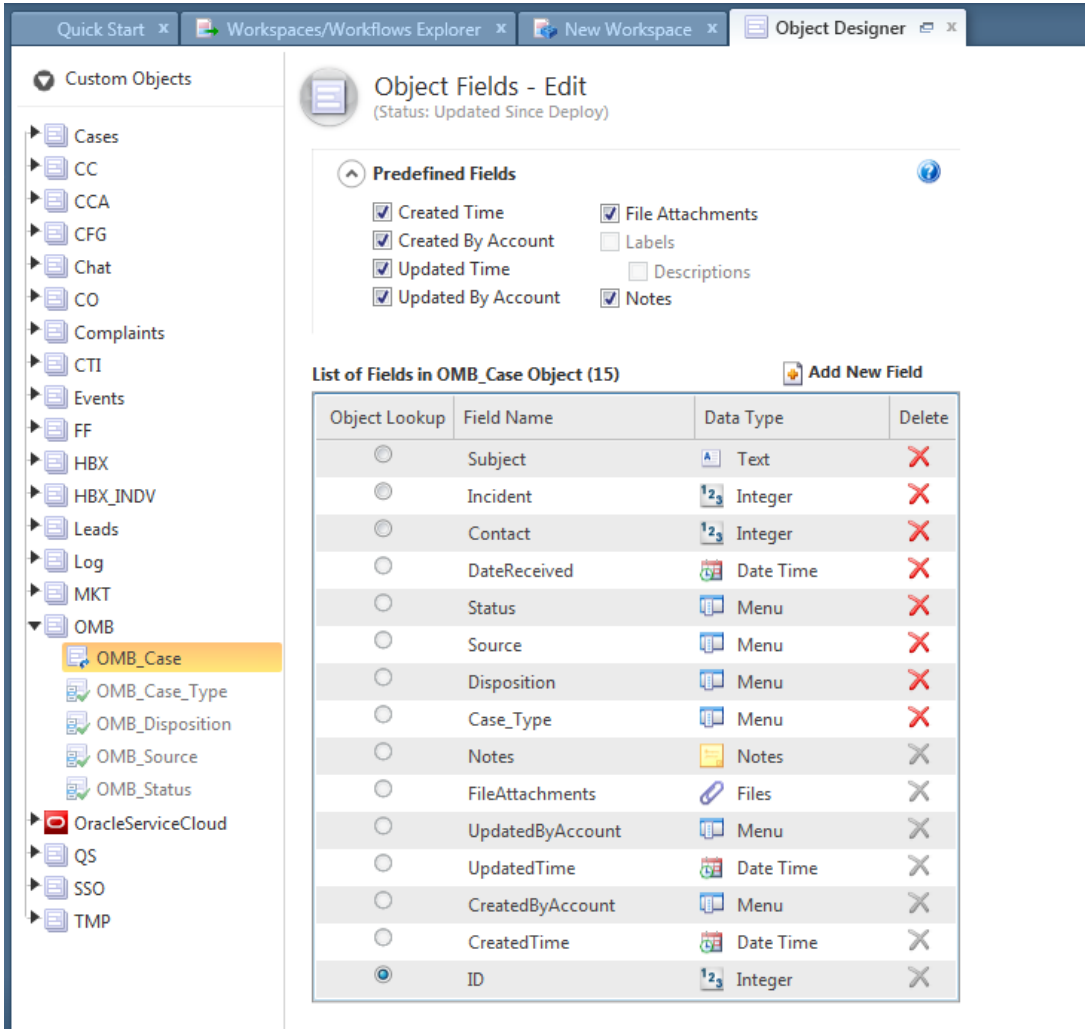
There are no items to show in this view.


Entry Point
A new record is b...
Incident
Connector
Yes
No
The current editor...
Incident
Yes
No
Contact
Loaded Contact
WHEN OK Button Pressed
WHEN Cancel Button Pressed
Set Fields
Incident
The logged in acc...
Incident
Yes
No
Contact
New Contact
Connector
New New Contact...
Last Contact
Set Fields
Incident
Connector
WHEN The finish script event fires
Save
WHEN Create_OMB_Case named event fires
OMB Incident WS
Incident
A new record is b...
Incident
Connector
Yes
No
Contact
Loaded Contact (2)
WHEN OK Button Pressed
Set Fields
Ombudsman...
Connector
Set Fields
Incident
Connector
OMB Case WS
Ombudsman Case
WHEN The record is saved without closing

Create OMB Custom Object

Object Designer > New > Package (OMB)

Object Designer > New > Object (OMB_Case)



NOTE: Create Menu Objects, then “Add New Field” to the OMB_Case object and select them from menu drop-down

Object Designer > New > Menu Only Object

Object Designer

Custom Objects

- Cases
- CC
- CCA
- CFG
- Chat
- CO
- Complaints
- CTI
- Events
- FF
- HBX
- HBX_INDV
- Leads
- Log
- MKT
- OMB
  - OMB_Case
  - OMB_Case_Type
  - OMB_Disposition
  - OMB_Source
  - OMB_Status
- OracleServiceCloud
- QS
- SSO
- TMP

Object Summary - Edit

(Status: Undeployed)

***Name**

OMB_Case_Type

Menu Object Options

Menu Items Add

Convert to Menu with Labels *(This action cannot be undone)*

- Eligibility - Annual Redetermination
- Eligibility - APTC/CSR
- Eligibility - During Benefit Year
- Eligibility - Initial
- Exemption
- Other
- Termination
- Termination - Other

At least one item must be added to the menu to save this object.

Custom Object Labels

Interface	Language	*Label	Description
coveredca	English (US)	OMB_Type	
coveredca_es	Spanish	OMB_Type	
coveredca_esp	Spanish	OMB_Type	

Object Designer > New > Menu Only Object

Object Designer

Custom Objects

- Cases
- CC
- CCA
- CFG
- Chat
- CO
- Complaints
- CTI
- Events
- FF
- HBX
- HBX_INDV
- Leads
- Log
- MKT
- OMB
  - OMB_Case
  - OMB_Case_Type
  - OMB_Disposition
  - OMB_Source
  - OMB_Status
- OracleServiceCloud
- QS
- SSO
- TMP

Object Summary - Edit

(Status: Undeployed)

***Name**

OMB_Disposition

Menu Object Options

Menu Items **Add**

Convert to Menu with Labels *(This action cannot be undone)*

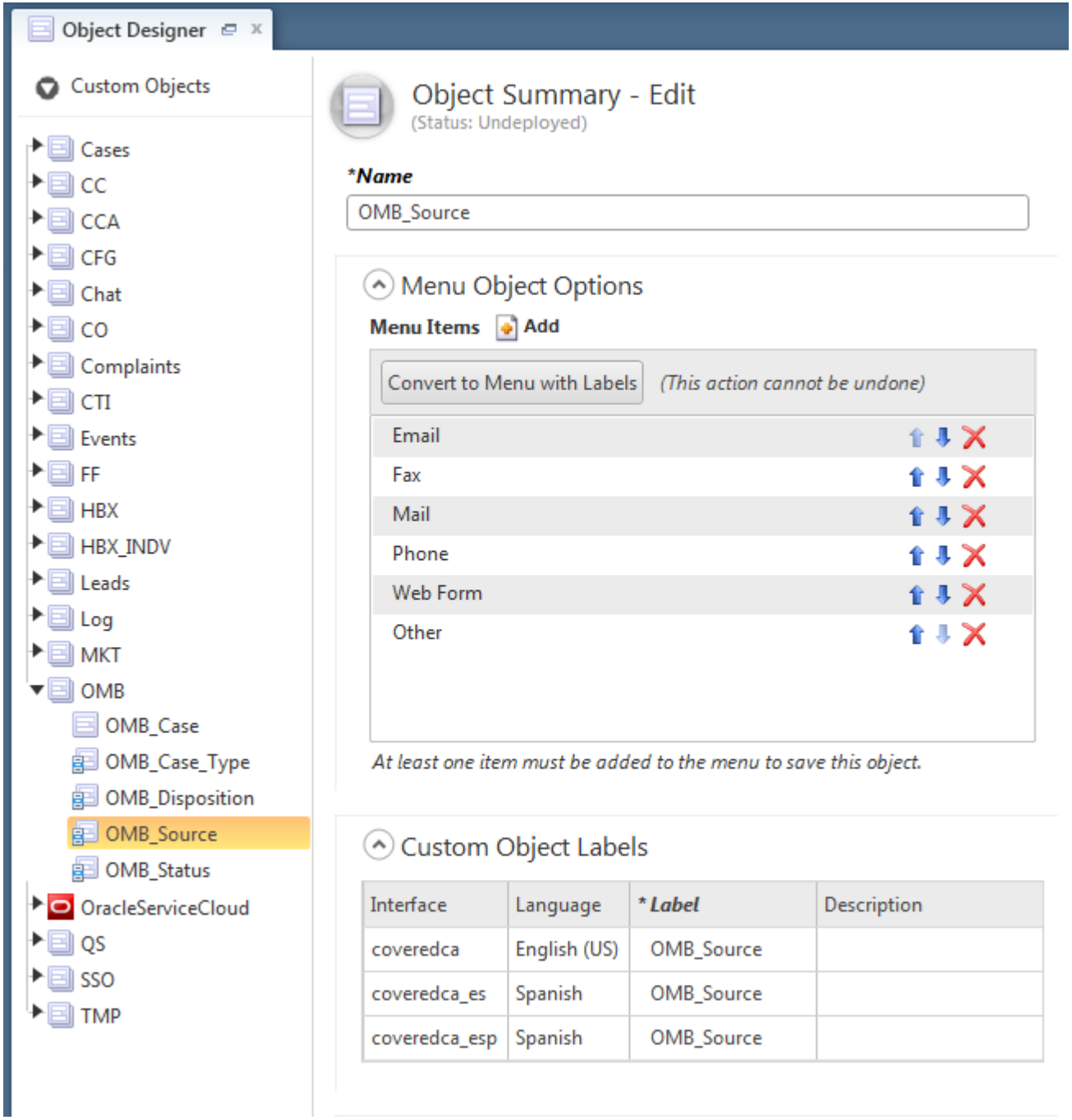
- Case Resolved without changes
- Case Referred to Appeals
- Case Referred to External Affairs
- Case Referred to PSU
- Case Referred to OCP
- Case Referred to Advocate
- Conditional Complaint Withdrawl
- Unconditional Complaint Withdrawl

At least one item must be added to the menu to save this object.

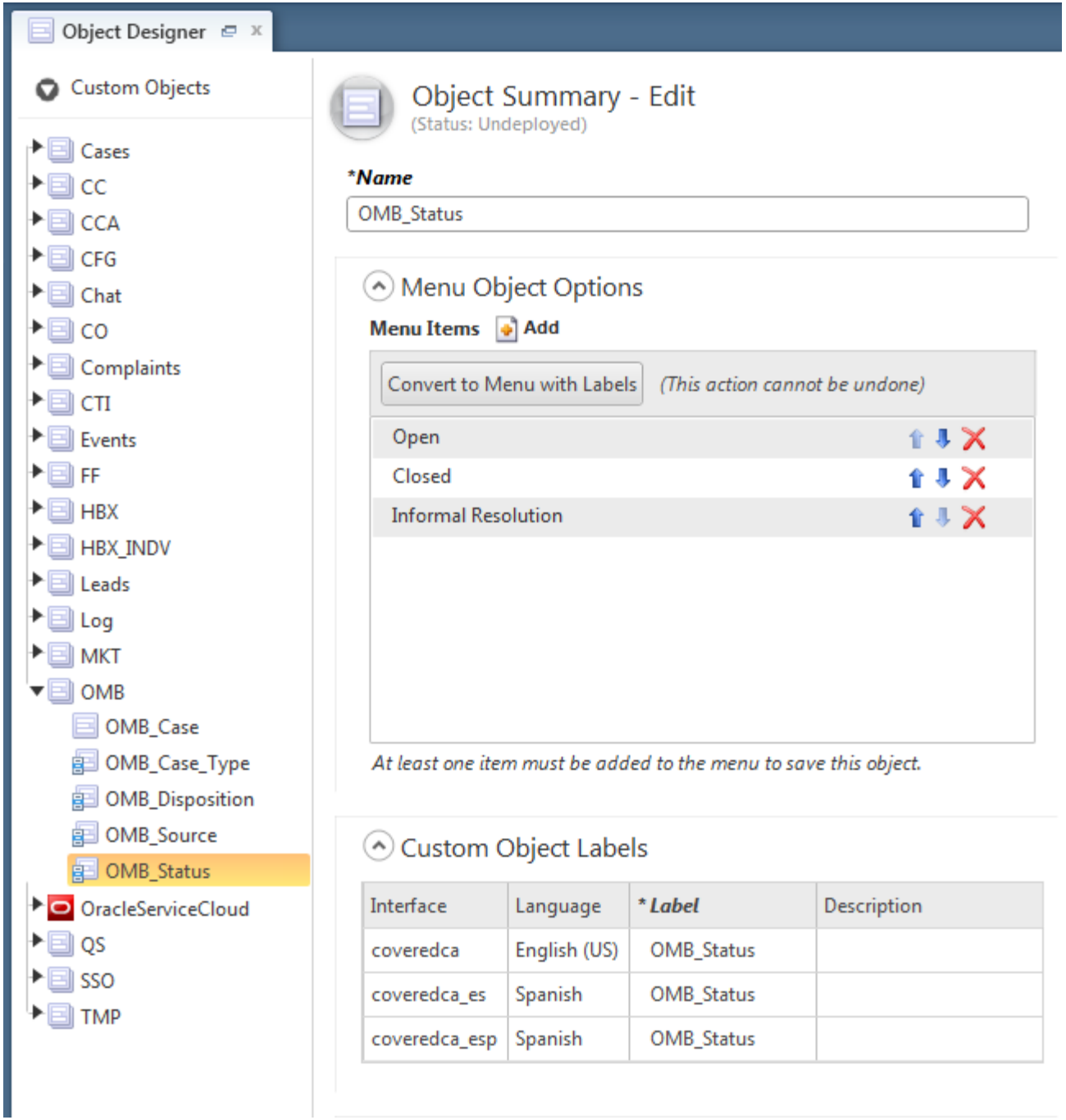
Custom Object Labels

Interface	Language	* Label	Description
coveredca	English (US)	OMB_Disposition	
coveredca_es	Spanish	OMB_Disposition	
coveredca_esp	Spanish	OMB_Disposition	

Object Designer > New > Menu Only Object



Object Designer > New > Menu Only Object



Now, add Menu's to OMB_Case object

Summary | Fields | Indices | Relationships | Extra Options | Audit Log | Deploy | Rollback | Export | Import

Show | Custom Objects

Object Designer

Custom Objects

- Cases
- CC
- CCA
- CFG
- Chat
- CO
- Complaints
- CTI
- Events
- FF
- HBX
- HBX_INDV
- Leads
- Log
- MKT
- OMB
  - OMB_Case
  - OMB_Case_Type
  - OMB_Disposition
  - OMB_Source
  - OMB_Status
- OracleServiceCloud
- QS
- SSO
- TMP

Object Fields - Edit

(Status: Undeployed)

Predefined Fields

- [x] Created Time
- [x] Created By Account
- [x] Updated Time
- [x] Updated By Account
- [x] File Attachments
- [ ] Labels
- [ ] Descriptions
- [x] Notes

List of Fields in OMB_Case Object (14) — Add New Field

Object Lookup	Field Name	Data Type	Delete
		Menu	✕
◉	ID	Integer	✕
	CreatedTime	Date Time	✕
	CreatedByAccount	Menu	✕
	UpdatedTime	Date Time	✕
	UpdatedByAccount	Menu	✕
	FileAttachments	Files	✕
	Notes	Notes	✕
	Case_Type	Menu	✕
	Status	Menu	✕
	Disposition	Menu	✕
	Subject	Text	✕
	Source	Menu	✕
	DateReceived	Date Time	✕

Field Details

***Name**

Field Options

- [ ] Is Auto Update
- [x] Is Nullable
- [ ] Is Read Only
- [x] Is In Single Field Index

Menu Field Settings

***Menu**

OMB.OMB_Status

Choose either a dynamic default or define a constant default.

Dynamic Default: None

Constant Default:

Interface Label

Interface	Language	*Label	Description
coveredca	English (US)		
coveredca_es	Spanish		
coveredca_esp	Spanish		

Summary | Fields | Indices | Relationships | Extra Options | Audit Log | Deploy | Rollback | Export | Import

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- MKT
- OMB
  - OMB_Case
  - OMB_Case_Type
  - OMB_Disposition
  - OMB_Source
  - OMB_Status
  - Account
  - Contact
  - Incident
- OracleServiceCloud

Object Relationships - Edit

(Status: Updated Since Deploy)

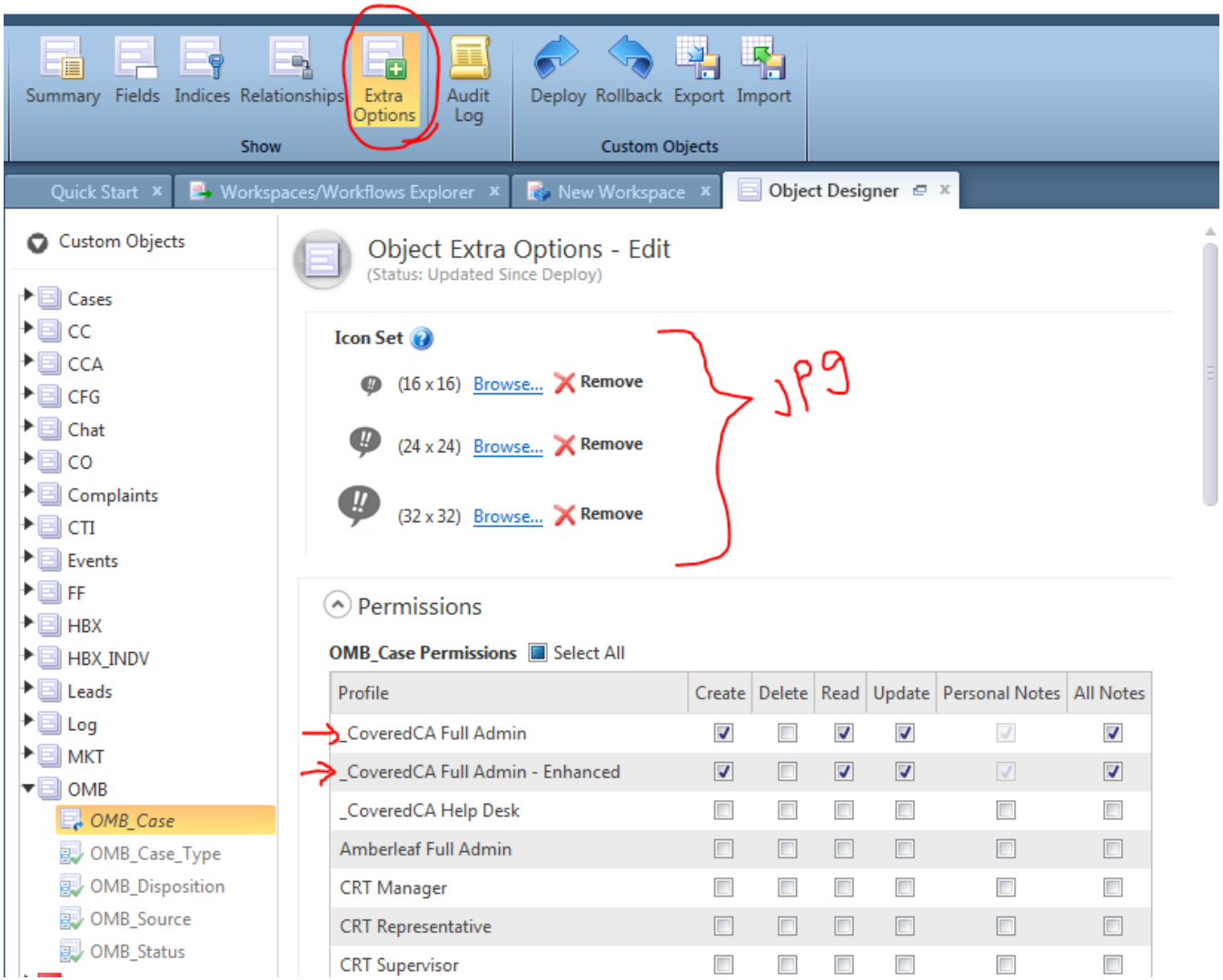
Parents of OMB_Case Object (8) Add

Main	Type	Parent Object	Parent Field	Child Field	Edit Relationship	Delete
◉	Association	OracleServiceCloud.Incident	i_id	Incident	Edit	✕
◉	Association	OracleServiceCloud.Contact	c_id	Contact	Edit	✕
◉	Association	OMB.OMB_Status	ID	Status	Edit	✕
◉	Association	OMB.OMB_Source	ID	Source	Edit	✕
◉	Association	OMB.OMB_Disposition	ID	Disposition	Edit	✕
◉	Association	OMB.OMB_Case_Type	ID	Case_Type	Edit	✕
○	Association	OracleServiceCloud.Accoun	acct_id	UpdatedByAccount	Edit	✕
◉	Association	OracleServiceCloud.Accoun	acct_id	CreatedByAccount	Edit	✕

Children of OMB_Case Object (3) Add

Type	Child Object	Child Field	Parent Field	Edit Relationship	Delete
Association	OracleServiceCloud.Accoun	OMB_Case	ID	Edit	✕
Association	OracleServiceCloud.Contact	OMB_Case	ID	Edit	✕
Association	OracleServiceCloud.Incident	OMB_Case	ID	Edit	✕

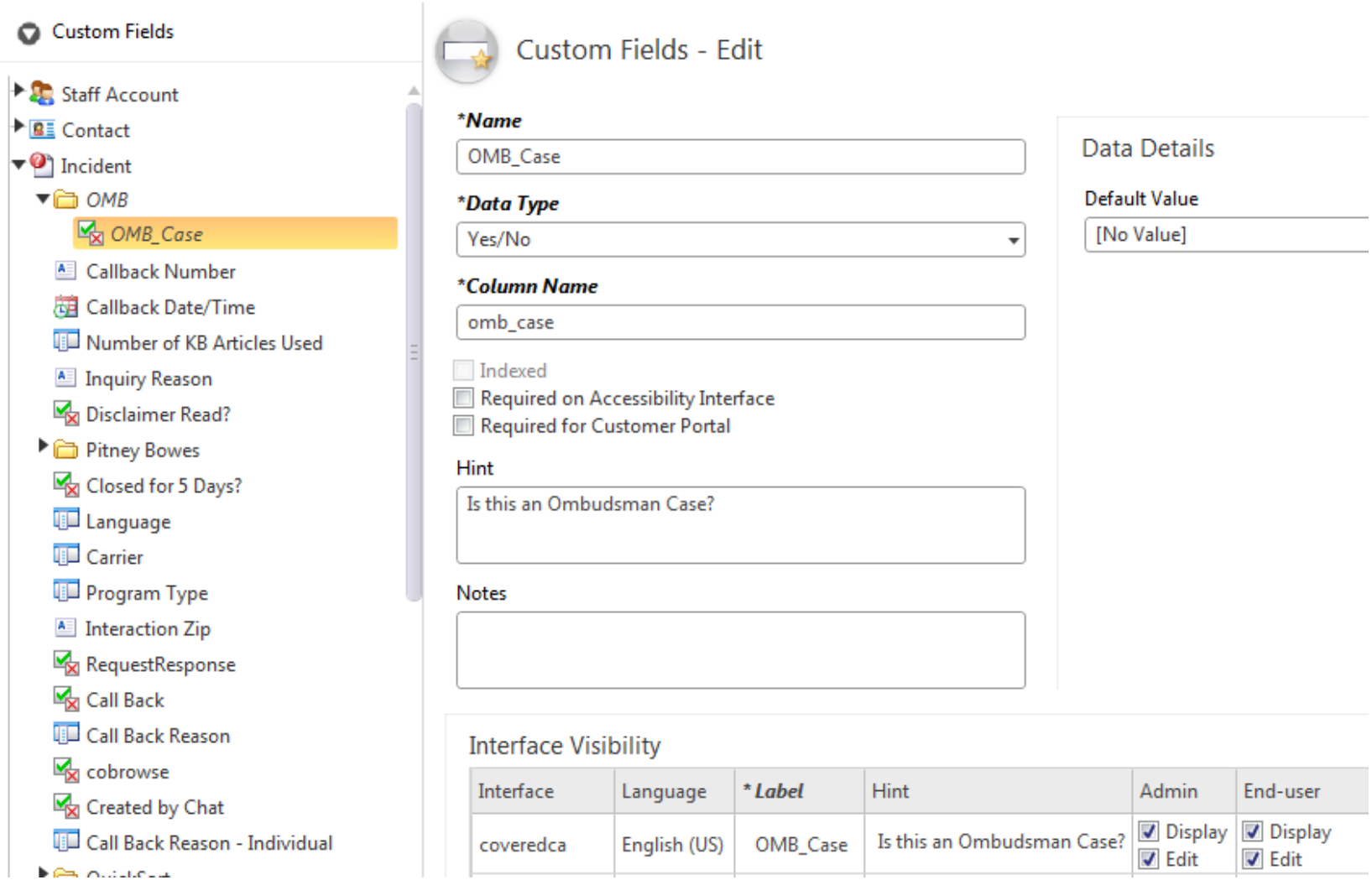
ADD Icon to Custom Object



ADD Custom field to Incident Object

Configuration > Database > Custom Fields > Incident

1. Create new folder called OMB or Ombudsman
2. Create new field:



Create/Import Workspaces

OMB Incident WS

Subject* | Incident Ref. # | CalHEERS Tkt No.

Type* [No Value] | Case ID | CalHEERS Tkt Submitted No V

Contact* | Application ID | CalHEERS Tkt Closed No V

Status* Open | Queue* [No Value] | ACA Appeal #

Assigned [No Value]

Create OMB Case

Messages | Details | Contacts | Appeals by Contact | Incidents by Contact | Attachments | Audit Log | Closed Incident Add-In | Rules Hit by Incident

Send On Save | Add | SmartAssistant | Search Knowledgebase | Standard Text | Options

11 | Plain Text

OMB Case WS

Subject* | Incident ID

Contact | Queue [No Value]

OMB Date Received* No Value | Status Open

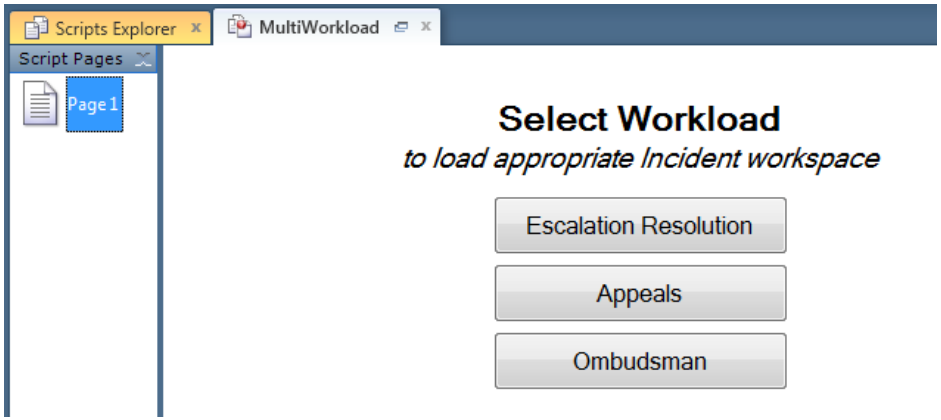
OMB Case Type* [No Value] | Source [No Value]

OMB Case Status* [No Value]

Notes | Documents | Incidents / Appeals | Audit Log

Add | Sort Date - Descending

Create Script for workload selection



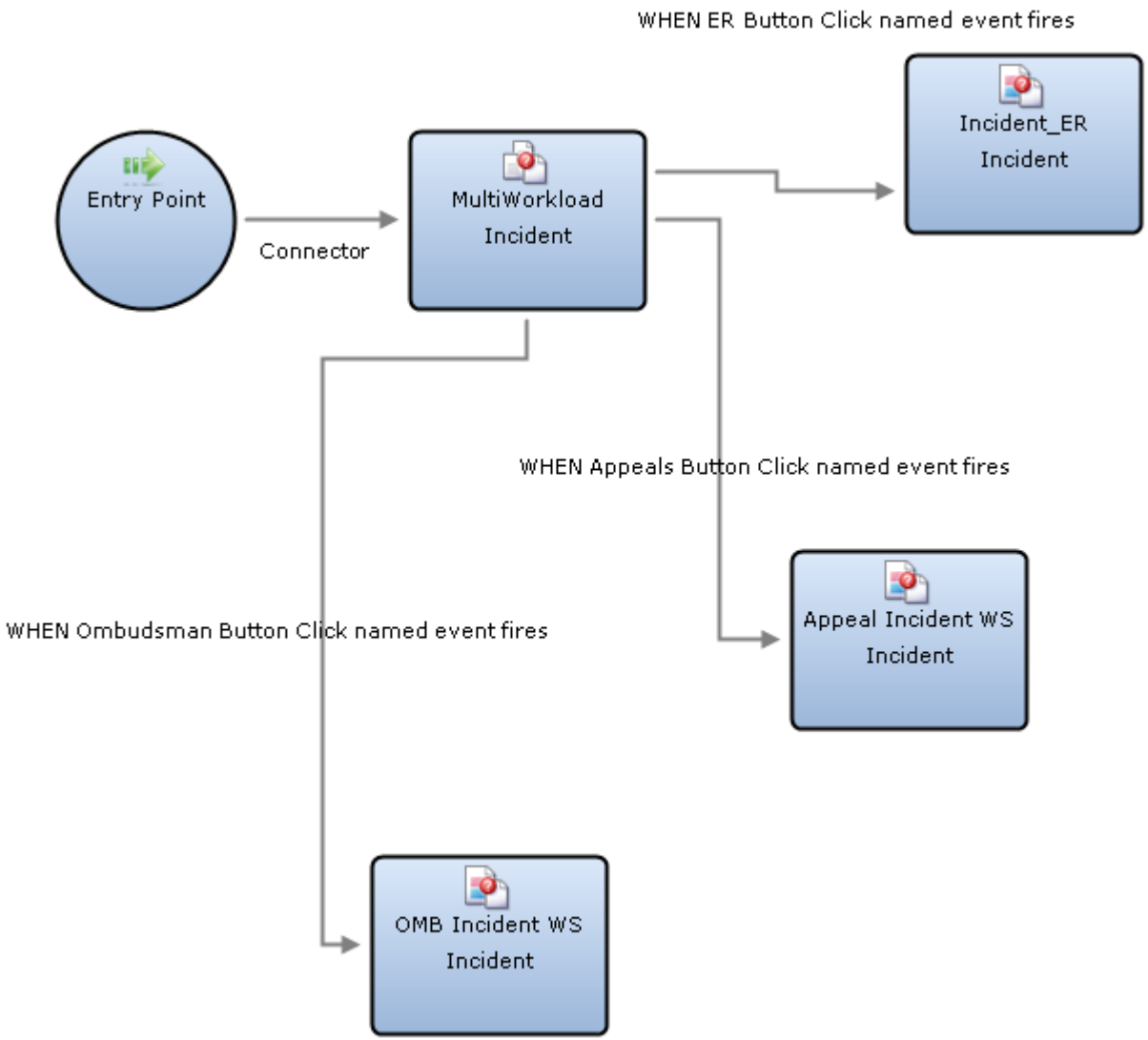
Apply this rule when
Escalation Resolution Button is clicked
Then this rule will
fire ER Button Click named event

Apply this rule when
Appeals Button is clicked
Then this rule will
fire Appeals Button Click named event

Apply this rule when
Ombudsman Button is clicked
Then this rule will
fire Ombudsman Button Click named event

Apply this rule when
page Loaded
But only if
The logged in account's profile equals MultiWorkload ER APL OMB
Then this rule will
show Ombudsman Button
Otherwise, this rule will
hide Ombudsman Button

Create Workflow



Assign workflow to default Incident workspace in profile settings

Incident	MultiWorkload WF