# Version History

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| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 02/06/2014 | Initial Draft Before Workshop | J. Kelly  Sreelatha SK |
| 1.1 | 02/18/2014 | Design Changes | J. Kelly |
| 1.2 | 08/20/2014 | Changed to CLIP | M. Schmidt |
| 1.3 | 09/02/2014 | Changed done to Type of violation field and workflow-3 | Sreelatha SK |
| 1.4 | 02/20/2015 | Changed to Integrate with Hansen | Sreelatha SK |

# Requirements Overview

The purpose of this document is to record the functional requirements needed to successfully develop a new service request. Certain standards have already been defined to record and resolve service requests received by the City, which should be followed as much as possible when defining the requirements for a new service request (see **Service Requests Standards** document).

# Requirements

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| **Department** | CLIP |
| **Record Type Name** | Vacant Lot Clean-Up |
| **Record Type Description** | To report a vacant lot for clean up. |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Vacant Lot Clean-Up* ***Record Type***.    1. The system displays a screen that has a ***Page Layout***, a ***Flow*** (agent script), and the ***Suggested Articles sidebar*** configured components:       1. The ***Page Layout*** associated with the *Vacant Lot Clean-Up* ***Record Type*** is being shown in the middle panel. This section shows the optional and mandatory data the agent needs to supply in order to create the case.       2. The ***Flow*** associated with the ***Page Layout*** is shown in the left panel. The flow is used to help an agent successfully step through the call taking process.       3. The ***Suggested Articles sidebar*** is being shown in the right panel. Articles display based on any matching words typed in the “Subject” field on the case.    2. The agent enters the required and optional data displayed for the specific Record Type selected. 3. When the agent saves the case, the system:    1. Auto-generates the next sequential Case Number    2. Associates the ***Contact*** record and related ***Account*** record to the case    3. Assigns the “New” case to the *Queue* representing the group of users responsible for resolving this type of service request (see Assignment Queue).    4. Sends an email to the contact indicating a new case has been created for their request if the “Send Notification Email to Contact” checkbox is selected. The standard “Case Creation” template will be used for the email. |
| **Default Settings for Standard and Custom Fields** | As indicated in the “Service Requests Standards” document, the following picklist values will be configured as the default values for the designated standard and custom case fields:   |  |  |  | | --- | --- | --- | | **Field Label** | **Standard List of Values** | **Default Value for New Case** | | Status | New, Open, In-Progress, Closed | New | | Case Origin | Phone, Email, Web, Facebook, Twitter, Mobile, Text, Communities |  | | Priority | High, Medium, Low | Medium | |
| **Service Request Types and SLAs** | As indicated in the “Service Requests Standards” document, each Case Record Type will be associated to one or more Service Request Types. If there is only one value, it will be selected by default otherwise there will not be a default. Below, please define the Service Request Type values for this case:   |  |  |  |  | | --- | --- | --- | --- | | **Service Request Types** | **SLA Number (e.g. 1, 2, 3, …)** | **SLA Type  (Hours, Business Hours, Days, or Business Days)** | **Interface** | | Vacant Lot Clean-Up | 90 Business Days | | Hansen | | Service Not Needed | None | None | None |   **NOTE: If the Case Record Type has one and only one Service Request Type the system will populate the Service Request Type when the New Case page is displayed.  If the Case Record Type has more than one Service Request Type the system will populate the Service Request Type via a workflow rule based on how the agent populates one or more fields.** |
| **Assignment Queue** | As indicated in the “Service Requests Standards” document, each Service Request Type is assigned to a Queue, representing the group of users responsible for resolving that type of request for service. If this type of service request follows the standard assignment methodology, please complete the following information:   |  |  |  | | --- | --- | --- | | **Service Request Types** | **Queue Name** | **Queue Members** | | Vacant Lot Clean-Up | CLIP | Hansen | | Service Not Needed | 311 Contact Center |  |   If this type of case does not follow the standard assignment methodology, please describe how the case should be assigned and who the case should be assigned to: NOT APPLICABLE |
| **Additional Case Fields** | The standard and custom case fields described in the “Service Requests Standards” document will be available for all cases. If this type of service request needs any other fields, please enter them below:   **Additional Information section**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Field Label** | **Field Type** | **Required** | **Rule #** | **History** | **Field Help Text** | | Is this a tree issue | Picklist  Values:Yes, No |  | Workflow Rule #3 |  | Is this a downed tree, leaning tree, or a tree where the roots are disturbing a house foundation | | Are there any other issues with the lot? | Dependent Picklist (Is tree an issue)  Values: Yes, No |  |  |  |  | | Lot Type | Picklist  **Values:** Vacant Lot, Parking Lot (find who owns the property, if privately owned then L&I, if city owned (generate email), Park (Parks), Yard (L&I), City Bldg lawn (generate email)  **Default:** | Yes | Workflow Rule #1  Workflow Rule #2 | No | What type of property is being reported (vacant lot, parking lot, park or yard)? | | Type of violation | ~~Use description~~  Picklist  **Values:** High weeds, Short dumping, Illegal dumping, Construction debris  **Default:** | Yes |  | No | What type of violation is occurring on the property (High weeds, short dumping, illegal dumping, construction debris, etc.) |   **Validation Rules**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Validation Rule** | **Error Message** | **Comments** | |  |  |  |  |  |   **Workflow Rules**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | | 1 | Workflow Rule for *Lot Type* (Yard or Parking Lot) | If the lot is a yard or a parking lot, the problem is a License & Inspections case. | Evaluate the rule when a record is created, and every time it’s edited. | *Lot Type* = ‘Yard’ or ‘Parking Lot’ | Display message: “L & I is responsible for parking lots and yards. The system has changed the Case Record Type to Maintenance Residential.”    Automatically change the *Case Record Type* = ‘Maintenance Residential’. | | 2 | Workflow Rule for *Lot Type* (Park) | If the lot is in a park, the problem is a Parks and Recreation case. | Evaluate the rule when a record is created, and every time it’s edited. | *Lot Type* = ‘Park’ | Display message: “The the Case Record has changed to Parks Safety and Maintenance.”    Automatically change the *Case Record Type* = ‘Parks Safety and Maintenance’. | | 3 | Workflow Rule for Tree Issue? | If this is a tree issue it is a Parks case | Evaluate the rule when a record is created | *Tree Issue* = Yes | Display message: “The the Case Record has changed Type to ~~Park~~ Street Trees.”    Automatically change the *Case Record Type* = ‘~~Park~~ Street Trees’. | |
| **Escalation Rule** | TBD |
| **Agent Instructions** | Purpose: To report a vacant lot for clean up.   * Contact fields: Enter the the customer’s name, address and contact information. * Ask the customer for his/her contact information that includes name and telephone number.  Advise customer this information is requested in the event the department needs to obtain more information to follow up on this request. * If the customer does not wish to leave their contact information, you must advise in the event the inspector is unable to locate the issues identified the case will have to be closed out.  Are you sure you want to submit this request anonymously? * Service Address fields: Enter the exact legal address of the property.   + A valid address for the lot is required but if there are multiple lots on the SAME HUNDRED BLOCK, the caller can provide one address and all lots on the block will be cleaned as long as they meet the requirements. If lots are not on the same hundred block, separate tickets must be created. An address for a HOUSE cannot be used to reference the lot. The customer must provide at least one valid address for a lot to be cleaned. * Description field: What type of violation is occurring on the property (High weeds, short dumping (illegal dumping), construction debris, etc.) * Advise the customer: * Vacant Lots are not yards, parking lots or parks. Complaints about yards or parking lots should be referred to License & Inspections. Complaints about parks should be referred to the Department of Parks and Recreation. * The Vacant Lot Program cannot legally enter a privately owned, fenced/locked lot without the owner's permission or court order. * The Vacant Lot Program does not prune or remove trees from private or public property. * The Vacant Lot Program does not fence vacant lots. The owner of a privately owned lot can fence their lot if they choose. * The request will be dispatched for inspection. The process for resolution is as follows:   1. Pictures will be taken of violation and notices will be sent to property owner within 30 business days.  2. Property owners will have 10 business days to comply with the violation notice. Once the compliance period is over, a re-inspection of the property will occur. ~~within 10 business days.~~  3. If owner complies with the notice (cleans the vacant lot), no work will be performed by the City and the case will be closed.  4. If the owner does not comply, a City Crew will be assigned to clean the property ~~within 30 business days~~ and the property owner will be billed for all cost associated with the clean up.  5. This process takes up to 90 days from the initial request to the date of the clean up, possibly longer in the summer months.   * *For 3-1-1* **supervisor use only**(215) 686-7098 *for escalated calls.*  1. If tree is on city owned property, send it Public Property via email (Monique Brinson – [Monique.Brinson@phila.gov](mailto:Monique.Brinson@phila.gov)) have agent verify pulic property using ownership layer data set. 2. If call is about a tree interfering with utility wire direct caller to PECO XXX-XXX-XXXX. 3. If a tree is downed on a vacant lot, spawn Parks SR. 4. If tree is damaging the foundation of the property, spawn L&I SR. 5. If a tree is encroaching the property owner can remove it themselves, close as Service Not Required. 6. If this is a fence issue inform the citizen that there is no action the city can take 7. If it is a criminal activity (in progress 911, refer to disctrict police office). 8. If unlicensed business, then spawn L&I SR. 9. Option List:    1. High Weeds – (Include desctiption in help text)    2. Short Dumping / Illegal Dumping – (Include desctiption in help text bagged or bulk items)    3. Construction Debris – (Include desctiption in help text)    4. Litter (Loose Trash)    5. Appliances |
| **Profiles** | Case Record Type will be made available to the “311 Agents”, “311 Supervisors”, “Case Workers”, and “System Administrators” Profiles.  **Note**: Profile definitions for the City have not been determined. Profiles above are for reference. |
| **Support Process Values** | New, Open, In-Progress, Closed |
| **Other Information** | ESRI / GIS will plot the location for duplicate identification. |

# Approvals after Requirements Definition Workshop

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| --- | --- | --- |
| **Date** | **Approver Name** | **Approver Signature** |
|  | Rochelle Smith \*  *(Graham researching)* |  |
|  | Graham Quinn  Kim Adams  Elizabeth Martens |  |