# Version History

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| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 01/31/2014 | Initial Draft Before Workshop | Sreelatha SK |
| 1.1 | 02/10/2014 | Minor Edits | J. Kelly |
| 1.2 | 02/12/2014 | Design-Related Edits | J. Kelly |
| 1.3 | 02/18/2014 | More Design-Related Edits | J. Kelly |
| 1.4 | 03/032104 | Added ESRI/GIS Information and Actions sections | J. Kelly |
| 1.5 | 03/03/2014 | Revisions after Requirements Workshop | J. Kelly |
| 1.6 | 03/13/2014 | Added Richard Bossert’s email for queue for EMS per his 03/04/14 email. Added “Incident Location” field per Jeremiah Laster’s 03/10/14 email. | J. Kelly |
| 1.7 | 04/07/2014 | Revised the Escalation Rule based on Chief Laster’s 04/06/14 email response to action item # 1. | J. Kelly |
| 1.8 | 07/02/2014 | Workflow-2 has been modified for the proper queue | Sreelatha SK |
| 1.9 | 08/08/2014 | Updated based on follow-up session | M. Schmidt |
| 1.10 | 08/08/2014 | Updated default field settings and support process | M. Schmidt |
| 1.11 | 10/18/2014 | Updated the v-rule #1 w.r.t support case # 05012266 | 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** | Fire Department |
| **Record Type Name** | Complaints against Fire or EMS |
| **Record Type Description** | To report a complaint against a Paramedic, EMS, Firefighter, and/or the Fire Department. |
| **Process Overview** | 1. Constituent requests the service 2. The Agent creates a case by selecting the *Complaint against Fire or EMS* ***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 *Complaint Against Fire or EMS* ***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** | | Complaint Against Fire or EMS | Refer to SLA Document | | 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** | | Complaint for Fire Department or EMS | Complaint for Fire Department | < ? > | | Complaint for Fire Department or EMS | Complaint for Regional EMS | Richard.Bossert@phila.gov |   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:  Note: Get information on **Name**, **Address**, and **Phone** number of the Customer for follow-up. These are standard fields, so not captured under additional information section.  **Additional Information section**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Field Label** | **Field Type** | **Required** | **Rule #** | **History** | **Field Help Text** | | Service Request Location known | Picklist  **Values:** Yes, No  **Default:** Yes | Yes | Validation Rule #1 | No | Is the exact location of the incident known? | | Complaint or Compliment | Picklist  **Values:** Complaint, Compliment  **Default:** | Yes | None | No | Is this report a complaint or a compliment? | | Incident Date and Time | Text(255) | Yes | None | No | When did the incident happen (date and time)? | | Incident Location | Text(255) | Dependent | Validation Rule #2 | No | What details describe the location where the incident happened? | | Firefighters or Paramedics Known | Picklist  **Values:** Yes, No  **Default:** | Yes | None | No | Are the names of the firefighters or paramedics known? | | Firefighter/Paramedic Names | Dependent Text(255)  *Firefighter/Paramedic Names* is enabled and required when *Firefighters or Paramedics Known* = ‘Yes’. | Dependent | Validation Rule #3 | No | What are the names of the firefighters or paramedics (if available)? | | Unit Known | Picklist  **Values:** Yes, No  **Default:** | Yes | None | No | Is the Unit Number of the fire or medic vehicle involved known? | | Unit Numbers | Dependent Text(255)  *ID Number* is enabled and required when *ID Number Known* = ‘Yes’. | Dependent | Validation Rule #4 | No | What are the ID numbers of the fire or medic vehicles involved (if available)? | | Ambulance Color | Picklist  **Values:** Red and White, Other  **Default:** | Yes | None | No | Is the ambulance red and white? | | Ambulance Type | Picklist  **Values:** Philadelphia Fire Dept, Other  **Default:** | Yes | Workflow Rule #1, Workflow Rule #2 | No | Does the ambulance say Philadelphia Fire Department? | | 911 Call | Picklist  **Values:** Yes, No, Unknown  **Default:** | Yes |  | No | Was this the result of a call to 911? | | Witnesses Known | Picklist  **Values:** Yes, No  **Default:** | Yes | None | No | What are the names of the witnesses (if available)? | | Witness Contact Information | Dependent Text(255)  *Witness Contact Information* is enabled and required *when* *Witnesses Known* = ‘Yes’. | Dependent | Validation Rule #5 | No | What is the contact information for the witnesses? | | Patient Name | Text(255) | No | None | No | What is the name of the patient (if known)? |   **Validation Rules**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Validation Rule** | **Error Message** | **Comments** | | 1 | Validation Rule for *Service Request Location* | *Service Request Location* not required if *Service Request Location Known* = ‘No’ |  | *Service Request Location Known* should be located above *Street* in the **Service Request Location** section.  Address/Intersection should be greyed out. | | 2 | Validation Rule for *Incident Location* | *Incident Location* is required if *Service Request Location Known* = ‘No’ |  |  | | 3 | Validation Rule for *Firefighter/Paramedic Names* | The *Firefighter/Paramedic Names* field must be populated (not NULL) if *Firefighters or Paramedics Known* = ‘Yes’. |  |  | | 4 | Validation Rule for *ID Numbers* | The *ID Numbers* field must be populated (not NULL) if *ID Number Known* = ‘Yes’. |  |  | | 5 | Validation Rule for *Witness Contact Information* | The *Witness Contact Information* field must be populated (not NULL) if *Witnesses Known* = ‘Yes’. |  |  |   **Workflow Rules**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | | 1 | Workflow Rule for *Ambulance Emblem (Regional EMS)* | If the ambulance is not red and white, and does not have a Philadelphia Fire Department emblem, then the service request should go in to the queue to Regional EMS. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Ambulance Color* = ‘Other’ AND *Ambulance Emblem* = ‘Other’ | Set the queue to **‘**Complaint for Regional EMS’. | | 2 | Workflow Rule for *Ambulance Emblem (Fire Department)* | If the ambulance is red and white, or has a Philadelphia Fire Department emblem, then the service request should go in to the queue to the Fire Department. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Ambulance Color* = ‘Red and White’ OR *Ambulance Emblem* = ‘Philadelphia Fire Dept’ | Set the queue to‘Complaint for Fire Department’. | |
| **Escalation Rule** | To escalate a complaint that has not had a response, a 311 Supervisor may contact the Special Investigations Office (SIO) at (215) 686-1368 as a primary contact or the Office of the Fire Commissioner at (215) 686-1300 as a secondary contact. |
| **Agent Instructions** | * Purpose: To report a complaint or a compliment for a EMS Provider or Fire Department. * Do not transfer the customer's call. These complaints are handled via a case and responded to by the appropriate Fire/EMS unit. To escalate complaints that have not been responded to, the 311 Supervisor may contact the Office of the Fire Commissioner at (215) 686-1300. * Contacts field: Enter the customer’s name, address, and phone number for follow up.   + Advise the customer that 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, advise the customer that if the inspector cannot locate the issues identified, the case will have to be closed out.  Ask the customer, “Are you sure you want to submit this request anonymously?” * Service Address field: Enter the address of the location where the incident occurred?   + Verify that you entered the address correctly by repeating the address back to the customer. * Description field: Describe the nature of the complaint against the Paramedic, EMS, Firefighter, and/or the Fire Department. * Advise the customer: * Once a case is entered into the system the Fire Department will follow up with the customer within 1 business day by phone and a formal letter will be sent within 2 business days. Depending on the nature of the complaint, investigations may take several business days. The customer will be given an approximate length of time to complete the investigation by the Fire Department on the follow up call. |
| **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 |
| **ESRI/GIS Information** | The GIS layers to be displayed are:   * The fire districts   The GIS features to be displayed for a selected address are:   * The fire stations   + Data to be displayed on mouse-over = Fire station address * Open Salesforce cases for Case Record Type = Complaint Against Fire or EMS   + Data to be displayed on mouse-over = Case #, Date Created, Contact Name, Status   The GIS features used but not displayed are:   * Zoning (all) * Address Validation Service |
| **Other Information** |  |
| **Actions** | 1. Clinton and Fire Department: Which of these GIS layers and features could be used for this service request: Fire has the following layers as Polygons: Battalion, Ladder Locals, Stations, Engine Locals, Fire Safety Education Districts. The following are points: Fire Dept. Facilities, Box Points. Hydrants should come from PWD. Also, research the need for Census Tracts, Blocks, etc. |

# Approvals after Requirements Definition Workshop

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| **Date** | **Approver Name** | **Approver Signature** |
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