# Version History

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 01/29/2014 | Initial Draft Before Workshop | J. Kelly |
| 1.1 | 02/17/2014 | Design Revisions | J. Kelly |
| 1.2 | 02/24/2014 | Design Revisions | J. Kelly |
| 1.3 | 02/26/2014 | Revisions Based on Previous L&I Meetings | J. Kelly |
| 1.4 | 02/26/2014 | Revisions Basedon Requirements Workshop | J. Kelly |
| 1.5 | 03/20/2014 | Revisions Based on Adam Johnson’s Email of 03/04/14 | J. Kelly |
| 1.6 | 03/20/2014 | Revisions Based on Adam Johnson’s Email of 03/04/14 | J. Kelly |
| 1.7 | 06/05/2014 | Field name modification due to size issue | Sreelatha SK |
| 1.8 | 08/12/2014 | Updated based on follow-up session | M. Schmidt |

# 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).

**Note: Per the City, the Demolition and License Contractor requirements documents are being integrated into this Construction Site Task Force document.**

# Requirements

|  |  |
| --- | --- |
| **Department** | License & Inspections |
| **Record Type Name** | Construction Site Task Force |
| **Record Type Description** | To report construction or demolition conducted after hours, without authorization |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Construction Site Task Force* ***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 *Construction Site Task Force* ***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).       1. Assignment notification emails will NOT be sent for cases that are being interfaced with Hansen.    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** | | Construction Site Task Force | Refer to SLA Document | | Hansen | | Demolition | Refer to SLA Document | | Hansen | | License Contractor | Refer to SLA Document | | 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** | | Construction Site Task Force | L&I CSTF | < ? > | | Demolition | L&I CSTF | < ? > | | License Contractor | L&I CSTF | < ? > | | Service Not Needed | 311 Contact Center | None |   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** | | Building Collapsing | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #1 | No | Is the building collapsing? | | Construction or Demolition | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #2 | No | Is the building currently under Construction or Demolition? | | Vallid Permit | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #3 | No | Review the Philly map. Based on the entered service address, is there a current construction or demolition permit? | | Unlicensed Contractors | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #3 | No | Are unlicensed contractors, subcontractors, or independent contractors hired as 1099 employees doing the work? | | Threatening Public Safety | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #3 | No | Are the construction or demolition activities threatening public safety, including adjacent properties? | | Construction or Demolition Debris | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #3 | No | Is construction or demolition debris causing a mess? | | Sidewalk Blocked | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #3 | No | Is the sidewalk blocked without permission to close the right of way? | | Work Performed Before/After Hours | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #3 | No | Are the construction or demolition activities conducted before/ after hours without permission? | | Permit Visible And/Or Displayed | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #3 | No | Is the permit visible and/or displayed? | | Type of Work Being Done | Text(255) | Yes | None | No | What type of work is being done? | | Contractor/Company Name | Text(100) | Yes | None | No | The name of contractor or company doing the work (if known). | | Demolition or Construction | Picklist  **Values:** Construction, Demolition, Both  **Default:** | Yes | None | No | Is the work being done construction, demolition, or both? | | Private Demolition | Dependent Read-Only Picklist  (Controlling field = *Demolition or Construction*)  Values = Yes, No, Unknown  All values are shown if *Demolition or Construction* = ‘Demolition’ OR ‘Both’  This read-only field will be automatically populated using the open Private Demolition Permits from the GIS record associated with the Service Request Location. | No | Validation Rule #1, Workflow Rule #4 | No | Is the demolition a private demolition? | | Demolition State | Dependent Picklist  (Controlling field = *Demolition or Construction*)  Values = In-Progress, Completed  All values are shown if *Demolition or Construction* = ‘Demolition’ OR ‘Both’ | No | Validation Rule #3 | No | Is the demolition in progress or is it already completed? | | L&I District | Text(50)  This read-only field will be automatically populated from the GIS L&I District layer associated with the GIS record selected as the Service Request Location | Yes | None | No | The L&I district in which the property is located. | | L&I Address | Text(100)  This read-only field will be automatically populated from the GIS L&I District layer associated with the GIS record selected as the Service Request Location. | Yes | Workflow Rule #6 | No | The L&I address key, based on the entered service address. |   **Validation Rules**   |  |  |  |  |  | | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Validation Rule** | **Error Message** | **Comments** | | 1 | Validation Rule for *Permit Number* | *Permit Number* <> Permit Number returned from GIS. | “The entered permit number is not a valid permit number.” |  | | 2 | Validation Rule for *Private Demolition* | The *Private Demolition* field must be populated (not NULL) if *Demolition or Construction* = ‘Yes’ OR ‘Both’. |  |  | | 3 | Validation Rule for *Demolition State* | The *Demolition State* field must be populated (not NULL) if *Demolition or Construction* = ‘Yes’ OR ‘Both’. |  |  |   **Workflow Rules**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | | 1 | Workflow Rule for *Building Collapsing* | If the building being demolished is collapsing, transfer the caller to 911. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Building Collapsing* = ‘Yes’ | Hot transfer the customer to 911.  Close this case. | | 2 | Workflow Rule for *Building Dangerous* | If the building is NOT currently under construction or demolition, then it should be a Building Dangerous service request. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Building Under Construction or Demolition* = ‘No’ | Display message: “The system has changed the *Case Record Type* Building Dangerous.”    Automatically change the *Case Record Type* = ‘Building Dangerous. | | 3 | Workflow Rule for *Building Construction* |  | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Valid Permit = ‘No’*  *AND*  *Unlicensed Contractors Performing Work* = ‘No’ AND  *Threatening Public Safety* = ‘No’  AND  *Construction or Demolition Debris Causing Mess* = ‘No’ AND  *Sidewalk Blocked* = ‘No’  AND  *Work Performed Before/After Hours* = ‘No’  AND  *Permit Visible And/Or Displayed* = ‘No’  AND  *Demolition or Construction* = ‘Construction’ | Display message: “The system has changed the Case Record Type to Building Construction.”    Automatically change the *Case Record Type* = ‘Building Construction. | | 4 | Workflow Rule for *Private Demolition* | If the building is undergoing a private demolition, submit a Building Construction service request. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Private Demolition* = ‘Yes’ | Display message: “The system has changed the Case Record Type to Building Construction.”    Automatically change the *Case Record Type* = ‘Building Construction’. | | 5 | Workflow Rule for *L&I* *Address (NULL)* | The system will change the case to a Service Not Needed if the Address Key returned from GIS is NULL. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Address Key* returned from GIS is NULL | Display Message: “A zoning violation case can be submitted only if the exact L&I address key is validated.”  Automatically change *Service Request Type* to “Service Not Needed’ and save the case.  Automatically assign the case and then close it with a Close Reason = “Service Not Needed”. | |
| **Escalation Rule** | TBD |
| **Agent Instructions** | * Purpose: To report any of the following: * Maintenance or safety issues with the city-ordered demolition of a building or home. [Demolition] * That someone is doing license contractor work without a permit. [License Contractor] * Construction or demolition conducted after hours, without authorization. L&I will inspect for complaints of work performed after hours at a construction/demolition site. [Construction Site Task Force 7669] * Construction or demolition work obstructing a sidewalk, that is not authorized by the City. L&I will inspect for complaints at a construction/demolition site where the sidewalk is blocked without permission to close the right of way. [Construction Site Task Force 7668] * Construction or demolition site with unposted licenses and permits. [Construction Site Task Force 7691] * Construction or demolition activities that threaten public safety, including to adjacent properties. [Construction Site Task Force 7690] * An unlicensed contractor or subcontractor and independent contractors hired as 1099 employees. L&I will inspect for complaints of unlicensed contractors performing work at a construction site. [Construction Site Task Force 7667] * A contractor making a mess or construction or demolition debris. [Construction Site Task Force 7693]   + Contact fields: Enter the name and phone number of the customer reporting the problem.   + 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: “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 anyway?” * Service Address fields: Enter the property address.   + Verify that you entered the address correctly by repeating the address back to the customer. If the address does not verify in Hansen, advise the the customer that “The system is unable to locate the property address. I am sorry this request cannot be processed if the system cannot find it.”   + Description field: Enter any additional information about the problem being reported. * Advise the customer:   + - * Construction/demolition work can be done from 7 AM to 8 PM on weekdays or Saturday, and after 8 AM on Sundays or holidays. Emergency construction work, such as water main breaks or gas leaks, can be conducted as needed.       * Once an inspector is assigned, the building/site should be inspected within 10 business days.       * If violations are found, a stop work order will be issued immediately.       * The owner usually has up to 5 days to comply with violations. Thereafter, up to 3 re-inspections may be conducted to ensure violations were complied or resolved. If not complied at last inspection, property will be referred to court for judgment from the court demanding the owner to resolve the problems.       * If a customer is trying to report construction or demolition being done without a permit refer to topic 2430.   + Private demolition: If the demolition is privately done by the owner, permits would be issued for demolition and found in Hansen. If the customer is reporting issues or no permits at a private demolition, refer to Building Construction (Topic ID 2430).   + A demolition inspection will occur within 48 hours. |
| **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 for the service request Location are:   * L&I District (all five districts: South, North, East, West, and Central)   The GIS features to be displayed for a selected address are:   * The permits, licenses, violations, and appeals currently listed for each location in the Philly map   + Data to be displayed on mouse-over = Attributes currently listed each each feature * Open Salesforce cases for Case Record Type = Daycare Residential or Commercial * Data to be displayed on mouse-over = Case #, Date Created, Contact Name, Status   The GIS features used but not displayed are:   * Zoning (all) |
| **Other Information** | TBD: The current policy is that if the L&I address key is not validated (NULL) then this is an information request that the 311 call center cannot accept. The City may review this policy. |
| **Actions** | 1. With Permits – Construction Site Task Force, Without Permits – Building Construction. During Hours – Districts, After Hours – Construction Site Task Force 2. Can we automatically validate the Contractor/Company Name through the GIS/Hansen integration? 3. Can we automatically determine if demolition occurred more than one year ago through the GIS/Hansen integration? 4. Can we automatically determine the demolition state through the GIS/Hansen integration? |

# Approvals after Requirements Definition Workshop

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