# Version History

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| **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 | 02/20/2014 | Revisions After Requirements Workshop | J. Kelly |
| 1.3 | 02/22/2014 | Peer Review Revisions Included | J. Kelly |
| 1.4 | 03/13/2014 | Added information about food preparation licenses per Joseph Gruber’s 02/24/14 email. Made “Family Daycare License” and “” fields dependent on “Residential or Commercial” value. | J. Kelly |
| 1.5 | 03/31/2014 | Updated Agent Instructions based on a comment from the City about owner’s children. | J. Kelly |
| 1.6 | 04/11/2014 | Updated Action Item #2 per Graham Quinn’s comment. | J. Kelly |
| 1.7 | 04/25/2014 | Added Sheryl Johnson’s responses to Action Items #5 and 6. | J. Kelly |
| 1.8 | 05/29/2014 | Updated revised SLA | Sreelatha SK |
| 1.9 | 07/15/2014 | Updated Service Request type for Assignment queue | Sreelatha SK |
| 1.10 | 08/12/2014 | Updated based on follow-up session | M. Schmidt |
| 1.11 | 08/21/2104 | Removed Residential / Commercial as Controlling Field | 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: The Daycare Residential requirements document and the Daycare Commercial requirements document have been integrated into this one document.**

# Requirements

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| **Department** | License & Inspections |
| **Record Type Name** | Daycare Residential or Commercial |
| **Record Type Description** | To report an either an unlicensed home/residential daycare, or a commercial daycare center that is unlicensed or has maintenance and/or fire code violations. |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Daycare Residential or Commercial* ***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 *Daycare Residential or Commercial* ***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** | | Daycare Commercial | Refer to SLA Document | | Hansen | | Daycare Residential | 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** | | Daycare Commercial OR Daycare Residential | The Queue will be set to the same value as the value in the ‘L&I Operations District’ field on the case which may be one of the following values:  1) Housing Code Enforcement Unit South  2) Housing Code Enforcement Unit North  3) Housing Code Enforcement Unit East  4) Housing Code Enforcement Unit West  5) Housing Code Enforcement Unit Central | << No queue members for SRs going to Hansen. >> | | Service Not Needed | 311 Contact Center | << No queue members. >> |   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:   * Daycare cases are assigned to a queue based on the *L&I District* field. |
| **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** | | Residential or Commercial | Picklist  **Values:** Residential, Commercial  **Default:**  This read-only field will be automatically populated from the GIS Zoning layer associated with the GIS record selected as the Service Request Location. | Yes | None | No | Is this property residential or business? | | One or Two Family Dwelling | Picklist  **Values:** Yes, No  **Default:** | Yes | None | No | Is the property a single-family or two-family property? | | Violation Type | Picklist  **Values:** Maintenance, Fire Code, Number of Children Exceeded  **Default:** | Yes | None | No | What type of violation is being reported? | | Family Daycare License | Read-Only Picklist  **Values** = Yes, No  Autopopulated based on service address and GIS information. | Yes | None | No | Does the daycare business have a family daycare license? | | Food Preparation and Service License | Read-Only Picklist  **Values** = Yes, No  Autopopulated based on service address and GIS information. | Yes | None | No | Does the commercial daycare business have a food preparation and service license? | | Daycare Business Name | Text(100) | Yes | None | No | The name of the daycare business. | | Hours of Operation | Text(50) | No | None | No | What are the hours of operation (if known)? | | 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 #1 | No | The L&I address key, based on the entered service address. |   **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 *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 daycare 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 an either an unlicensed home/residential daycare, or a commercial daycare center that is unlicensed or has maintenance and/or fire code violations.   + Residential: An unlicensed home/residential daycare (less than 6 children) operating without a license. Example: Ms. Jones at 1219 Marvine St is babysitting 5 kids in her home without a license. The only license that a residential daycare center requires is a Family Daycare License.   + Commercial: A commercial daycare center that is unlicensed or that has maintenance and/or fire code violations. The only license that a commercial daycare center requires is a Food Preparation and Service License. * Contact fields: Enter the name and phone number of the customer making the report. * Service Address fields: Enter the exact, legal address of the daycare. * Description fields: Enter any additional information about the unlicensed daycare. * Advise the customer:   + Once a request is entered into the system the business should be inspected within 30 days and if appropriate violations will be issued after it is inspected.   + The owner usually has up to 30 days to comply with violations. Thereafter, up to 3 reinspections may be conducted to ensure violations were complied or resolved. If not complied at last inspection, property will be referred to court for further action. In a rare case where the owner has been removed from the property by city agencies, coordinated efforts will be made to correct the outstanding violations. * If any of the children on the premises are the owner’s children, they are not counted for the Residential/Commercial licensing requirements. |
| **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:   * Zoning (all) * L&I District (all five districts: South, North, East, West, and Central)   The GIS features to be displayed for a selected address are:   * Open zoning permits   + Data to be displayed on mouse-over = Permit #, Date Created, Applicant * Open familiy daycare licenses (for residential addresses)   + Data to be displayed on mouse-over =License #, Date Created, Applicant * Open food preparation and service licenses (for commercial addresses)   + Data to be displayed on mouse-over =License #, Date Created, Applicant * Open Salesforce cases for Case Record Type = Daycare Residential or Commercial   + Data to be displayed on mouse-over = Case #, Date Created, Contact Name, Status   **NOTE:** The food preperation licenses in question pertaining to day care which are found in the GIS\_LNI\_LICENSES layer are:   * FOOD PREP (<50 SEATS)   License Type: 3120 * FOOD PREP (50 + SEATS)  License Type: 3121 |
| **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. Joseph will confirm Food Licenses are in the GIS License layer. *Per email from Joseph Gruber on 02/24/14 – Done.* 2. Graham will decide if SLA should be kept or removed from the flow. *Per Graham Quinn on 04/10/14 – Yes this should be kept.* 3. Unisys to ensure SLA is added as a separate column on the Case Record Type that displays in the 311 Request Type section of the Global Search Results. 4. Bernice Johnson will confirm if the SLA should be officially changed to 20 days. *Per Sheryl Johnson, the SLA does not change unti Philly 311 receives official change notice.* 5. Sheryl Johnson will confirm if the City does not want the system to change the case to a Service Not Needed if the Address Key is NULL (currently the Call Center will not create an SR if the Address Key is not valid). *Per Sheryl Johnson on 04/04/14: The current process will remain the same. Please change from Service Not Needed to Service Not Rendered.* 6. The City may want to update the KB Article that indicates a Residential Daycare is one that has “less than 6 children”, but Bernice says it should be “less than 7 children”. *4/11/14 – Per Sheryl this has been updated in the KB article.* 7. The City will provide the relevant permits. |

# Approvals after Requirements Definition Workshop

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