# 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 | 02/24/2014 | Revisions Based on Initial L&I Workshops | J. Kelly |
| 1.3 | 02/25/2014 | Revisions Based on Workshop Meeting | J. Kelly |
| 1.4 | 03/02/2014 | Revisions Based on Requirements Workshop | J. Kelly |
| 1.5 | 04/07/2014 | Added Sheryl Johnson’s response to Action Item #1. Removed highlighting from requirement workshop revisions. | J. Kelly |
| 1.6 | 05/29/2014 | Updated revised SLA, Updated Record Type, Field name modification due to size issue | Sreelatha SK |
| 1.7 | 06/19/2014 | Updated Validation Rule #2 | M. Schmidt |
| 1.8 | 08/12/2014 | Updated based on follow-up session | M. Schmidt |
| 1.9 | 09/02/2014 | Modified the field name Provide Access to Inspector | Sreelatha SK |
| 1.10 | 12/03/2014 | Modified required fields | M. Schmidt |
| 1.11 | 03/26/2015 | Modified Is Customer the Property Owner and Flooded Residential Basement work flows to create service request when certain conditions are met (Support ticket # 08968974) | Sheryl Johnson (City of Philadelphia), 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).

**NOTE: This requirements definition document combines parts of article 1547 (Maintenance Residential), 3373 (Maintenance Residential), 1539 (Maintenance Residential), and 2437 (Maintenance Commercial).**

# Requirements

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| **Department** | License & Inspections |
| **Record Type Name** | Maintenance Residential or Commercial |
| **Record Type Description** | To file a complaint for a building (private residence included) with outstanding interior and/or exterior maintenance issues (both tenant or owner occupied). |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Maintenance 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 *Maintenance 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** | | Maintenance Residential | Refer to SLA Document | | Hansen | | Maintenance Commercial | 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** | | Maintenance Residential or Commercial | L&I Operations North District | Hansen | | Maintenance Residential or Commercial | L&I Operations South District | Hansen | | Maintenance Residential or Commercial | L&I Operations East District | Hansen | | Maintenance Residential or Commercial | L&I Operations West District | Hansen | | Maintenance Residential or Commercial | L&I Operations Central District | Hansen | | 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** | | 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 | Workflow Rule #1, Workflow Rule #2 | No | Is code violation in a residential building or a commercial building? | | Exterior or Interior | Picklist  **Values:** Exterior, Interior  **Default:** | Yes | None | No | Is the code violation outside the building or inside the building? | | Residential Property Type | Dependent Picklist  (Controlling field = *Residential or Commercial*)  **Values:** House, Apartment, Condo  **Default:**  All values are shown if *Residential or Commercial* = ‘Residential’ | Yes | Validation Rule #1 | No | Is the property a house or apartment? | | Unit Number | Dependent Text(25)  Apartment Number is enabled and required if *Residential or Commercial* = ‘Residential’, AND *Residential Property Type* = ‘Apartment’ OR ‘Condo’. | Yes | Validation Rule #2 | No | The unit number of the apartment or condo. | | Problem Location at House or Unit | Dependent Picklist  (Controlling field = *Residential or Commercial*)  **Values:** Front, Rear, Public Right of Way  **Default:**  All values are shown if *Residential or Commercial* = ‘Residential’ | Yes | Validation Rule #3, Workflow Rule #3 | No | For maintenance at a residential property, where is the problem? | | Provide Access to Inspector | Dependent Picklist  (Controlling field = *Residential or Commercial*)  **Values:** Yes, No  **Default:**  All values are shown if *Residential or Commercial* = ‘Residential’ AND if *Exterior or Interior* = ‘Interior’ | Yes | Validation Rule #4 | No | If the inspector needs access to view the problem in the interior of a residential property, will an adult (over age of 18) be there to provide access? (An adult must be present.) | | Is Customer the Property Owner | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #4 | No | Is the customer the property owner? | | Property Owner Name | Text(100)  This read-only field will be automatically populated from the Address Validation Service based on the Service Request Location. | Yes | None | No | The name of the property’s owner. | | Property Owner Contact Information | Text(50)  This read-only field will be automatically populated from the Address Validation Service based on the Service Request Location. | Yes | None | No | Information for contacting the property’s owner. | | Drainage Problem | Picklist  **Values:** Yes, No  **Default:** | Yes | None | No | Is there a drainage problem? | | Flooded Residential Basement | Dependent Picklist  (Controlling field = *Drainage Problem*  **Values:** Yes, No  **Default:**  All values are shown if *Drainage Problem* = ‘Yes’ | No | Validation Rule #1, Workflow Rule #4 | No | Is the report regarding a flooded basement at a residential property? | | 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 #5 | 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 *Residential Property Type* | The *Residential Property Type* field must be populated (not NULL) if *Residential or Commercial* = ‘Residential’. |  |  | | 2 | Validation Rule for *Unit Number* | The *Unit Number* field must be populated (not NULL) if *Residential Property Type* = ‘Apartment’ OR ‘Condo’ |  |  | | 3 | Validation Rule for *Problem Location at House or Unit* | The *Problem Location at House or Unit* field must be populated (not NULL) if *Residential or Commercial* = ‘Residential’. |  |  | | 4 | Validation Rule for *Adult Present to Provide Access to Inspector* | The *Adult Present to Provide Access to Inspector* field must be populated (not NULL) if *Residential or Commercial* = ‘Residential’ AND if *Exterior or Interior* = ‘Interior’. |  |  |   **Workflow Rules**   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | **Rule #** | **Rule Name** | **Rule Description** | **Evaluation Criteria** | **Rule Criteria** | **Workflow Action** | | 1 | Workflow Rule for *Residential or Commercial (Residential)* | If the property is residential, then submit the Maintenance Residential service request. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Residential or Commercial* = ‘Residential’ | Set the *Service Request Type* to ‘Maintenance Residential’. | | 2 | Workflow Rule for *Residential or Commercial (Commercial)* | If the property is commercial, then submit the Maintenance Commercial service request. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Residential or Commercial* = ‘Commercial’ | Set the *Service Request Type* to ‘Maintenance Commercial. | | 3 | Workflow Rule for *Problem Location at House or Unit* | L&I does not write violations for issues on common or public areas such as sidewalks, streets, alleys and driveways – only for the front or rear of the property. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Problem Location at House or Unit* = ‘Public Right of Way’ | Display Message: “This is a Streets issue.”  Automatically change Service Request Type to “Illegal Dumping” | | 4 | Workflow Rule for *Flooded Basement* | If the property is residential, and the drainage problem is in the basement, and the problem is not caused by a neighbor, then it is the responsibility of the Water Department. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Flooded Basement* = ‘Yes’ AND *Is Customer the Property Owner* = ‘Yes’ | Display message: “If a home owner is reporting flooding in the basement, the Water Department is responsible for addressing the problem.”  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”. | | 5 | Workflow Rule for *L&I* *Address (NULL)* | The system will change the case to a Service Not Needed service request 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 fire code 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 file a complaint for a building (private residence included) with outstanding interior and/or exterior maintenance issues (both tenant or owner occupied), OR to report a clogged yard drain, main drain, or flooded basement in a residential or commercial property. * Examples: Non-working utilities, inoperable windows, faulty electrical outlets, leaks in the ceilings, non-locking exterior doors, overgrown grass and/or weeds, trash and/or debris on front or back yards, interior smells, cat odor, interior trash, deteriorated exterior walls and/or porches, hoarding, etc * Contact fields: Enter the name, address, 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 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 fields: Enter the exact, legal address of the property.   + 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 a description of the maintenance problem and the exact location (bedroom, bathroom, front, rear, etc). * Advise the customer: * For an interior residential inspection, an adult (over 18) must be present. The L&I inspector will use the customer’s contact information to schedule an inspection time if the customer requests an interior inspection. * **L&I does not write violations for issues on common or public areas such as sidewalks, streets, alleys and driveways – only for the front or rear of the property only.** * Once a request is entered into the system the building should be inspected within 20 business days and if appropriate a violation(s) issued and/or a plan for resolution discussed after it is inspected. |
| **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 Operations District (all five districts: South, North, East, West, and Central)   The GIS features to be displayed for a selected address are:   * Open Salesforce cases for Case Record Type = Maintenance Residential or Commercial * Data to be displayed on mouse-over = Case #, Date Created, Contact Name, Status   The GIS layers used but not displayed are:   * Zoning (all) * Address Validation Service |
| **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. Bernice: Verify that the SLA change from 30 days to 20 days is official. *Per Sheryl Johnson on 04/04/2014: The SLA should stay at 30 days unless Philly311 receives a formal change.* 2. Steve and Clinton: Determine in the integration meetings how apartment units will be handled. 3. Steve and Clinton: Need to address question of duplicates in meetings with Streets and L&I. |

# Approvals after Requirements Definition Workshop

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