# 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 | Design Revisions | J. Kelly |
| 1.3 | 02/26/2014 | Revisions Based on Previous L&I Meetings | J. Kelly |
| 1.4 | 02/28/2014 | Revisions Based on Requirements Workshop | J. Kelly |
| 1.5 | 03/31/2014 | Added the City’s response to the Action Item. Removed yellow highlighting and struckthrough text. | J. Kelly |
| 1.6 | 04/25/2014 | Added Sheryl Johnson’s response to Action Item # 1. | J. Kelly |
| 1.7 | 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).

# Requirements

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| **Department** | License & Inspections |
| **Record Type Name** | Other Dangerous |
| **Record Type Description** | To report a dangerous or unsafe garage, fence or retaining wall--including any structure aside from the main property at the address which is in danger of collapse, has collapsed and/or debris is falling. |
| **Process Overview** | 1. Customer requests the service 2. The Agent creates a case by selecting the *Other Dangerous* ***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 *Other Dangerous* ***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** | | Other Dangerous | 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** | | Other Dangerous | L&I Contractual Services | 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** | | Structure Collapsing | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #1 | No | Is the structure collapsing? | | Under Construction or Demolition | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #2 | No | Is the building currently under construction or demolition? | | Location of Dangerous Condition | Multi-Picklist  **Values:** Exterior, Interior, Front, Back, Left Side, Right Side  **Default:** | Yes | None | No | What is the location of the dangerous condition? | | Vacant or Occupied | Picklist  **Values:** Vacant, Occupied  **Default:** | Yes | None | No | Is the structure vacant or occupied? | | 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 #3 | 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 *Structure Collapsing* | If the structure is collapsing now, transfer the caller to 911. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Structure Collapsing* = ‘Yes’ | Hot transfer the customer to 911.  Close this case. | | 2 | Workflow Rule for *Under Construction or Demolition* | If the building is currently under construction or demolition, submit a Construction Site Task Force service request. | Evaluate the rule when the value in a field(s) is populated/updated to a specific value. | *Under Construction or Demolition* = ‘Yes’ | Display Message: “If the building is currently under construction or demolition, submit a Construction Site Task Force service request.”  Automatically change the *Case Record Type* to “Construction Site Task Force”. | | 3 | 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 a dangerous or unsafe garage, fence or retaining wall--including any structure aside from the main property at the address which is in danger of collapse, has collapsed and/or debris is falling. * 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 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 property address.   + Verify that you entered the address correctly by repeating the address back to the customer.   + If the system is unable to locate the property address, advise the customer: “We cannot verify that address. Please call 911 immediately.” * Description field: Describe the dangerous and/or unsafe condition(s). This means the property has **STRUCTURAL** issues that could cause the detached garage, shed, fence or retaining wall to collapse.   + Examples: A customer reporting a property with a rear shed whose roof is collapsing. A customer reporting the wall that separates the alley from the rear yard has collapsed. * 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.   + An inspection will occur within 15 business days.   + If the property fails the inspection, violations are issued. |
| **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 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 * All L&I violations   + Data to be displayed on mouse-over = Violation #, Date Created, Status * 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) * 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. Commissioner: For dangerous buildings, when the address does not validate, is calling 911 the best option or can the policy be changed in this instance to accept the address provided by the customer, as long as the customer provides their contact information? *From Adam Johnson on 03/28: In a separate meeting, Sheryl Johnson said that she previously spoke with L&I’s Commissioner about this, and my understanding is that a validated address is still required. Please confirm this with Sheryl. 4/11/14 – Per Sheryl L & I has not advised 311 of any changes to 311 regarding handling of addresses that do not validate; therefore the current process stands until further notice.* |

# Approvals after Requirements Definition Workshop

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