# 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 | 02/24/2014 | 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 Action Item #1. 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** | Tree Dangerous |
| **Record Type Description** | Neighbor's tree causing damage to structure |
| **Process Overview** | 1. Constituent requests the service 2. The Agent creates a case by selecting the *Tree 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 *Tree 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** | | Tree 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** | | Tree 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** | | Life Threatening Condition | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #1 | No | Does the incident involves loss of life or is life threatening like trees trapping people in cars, trees falling on people, or trees on downed wires that are now smoking or on fire? | | Tree Between Sidewalk and Curb | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow #2 | No | Is tree located between sidewalk and curb? | | ~~Tree on Side Street~~ | ~~Picklist~~  **~~Values:~~** ~~Yes, No~~  **~~Default:~~** | ~~Yes~~ | ~~Workflow #3~~ | ~~No~~ | ~~Is the tree located on a side street?~~ | | Tree on Power Lines, No Smoke/Fire | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #4 | No | Is the tree on power lines, with no smoke or fire present? | | Blocking Traffic, Sidewalk, Home Access | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #5 | No | Are fallen trees or tree limbs blocking the street, sidewalk or access to a home? | | On Property of Person Making Report | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #6 | No | Is the tree on the property of the person reporting the dangerous tree? | | Overgrown or Aready Fallen | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #7 | No | Is the tree alive and overgrown or has it already fallen, but NOT a 911 emergency? | | Growing in Vacant Building | Picklist  **Values:** Yes, No  **Default:** | Yes | Workflow Rule #8 | No | Is the tree alive and growing through a vacant building, possibly causing a collapse? | | Branches Break Easily | Picklist  **Values:** Yes, No  **Default:** | Yes | None | No | If the customer pulls on the tree’s branches, do they break off easily? Is the customer unable to see any green or white in the middle? | | Leaves in Spring and Summer | Picklist  **Values:** Yes, No  **Default:** | Yes | None | No | Does the tree have leaves in Spring and Summer? | | Animals Living in Tree | Picklist  **Values:** Yes, No  **Default:** | Yes | None | No | Are there any animals living in the tree? (Birds, squirrels, etc.) | | Dead or Alive Tree | Picklist  **Values:** Dead, Alive  **Default:**  Calculated field. If *Branches Break Easily* = ‘No’ OR *Leaves in Spring and Summer* = ‘Yes’ OR *Animals Living in Tree* = ‘Yes’ then *Dead or Alive Tree* = ‘Alive’. | Yes | Workflow Rule #9 | No | Is the tree dead or alive? | | How Many Trees | Number | Yes | None | No | How many trees are being reported? | | 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 #10 | 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 *Life Threatening Condition* | If the incident involves loss of life or is life threatening like trees trapping people in cars, trees falling on people or trees on downed wires that are now smoking or on fire, transfer the caller to 911. | Evaluate the rule when a record is created, and every time it’s edited. | *Life Threatening Condition* = ‘Yes’ | Hot transfer the constituent to 911.  Close this case. | | 2 | Workflow Rule for *Tree Between Sidewalk and Curb* | If the tree is located between the sidewalk and the curb, submit a Street Trees service request. | Evaluate the rule when a record is created, and every time it’s edited. | *Tree Between Sidewalk and Curb* = ‘Yes’ | Display message: “The system has changed the *Case Record Type* to Street Trees.”    Automatically change the *Case Record Type* = ‘Street Trees’. | | 3 | Workflow Rule for *Tree on Side Street* | If the tree is located on a side street, submit a Street Trees service request. | Evaluate the rule when a record is created, and every time it’s edited. | *Tree on Side Street* = ‘Yes’ | Display message: “The system has changed the *Case Record Type* to Street Trees.”    Automatically change the *Case Record Type* = ‘Street Trees’. | | 4 | Workflow Rule for *Tree on Power Lines, No Smoke/Fire* | If the incident involves power lines, PECO must be contacted. Refer the caller to 800-841-4141 and include this information in your summary. | Evaluate the rule when a record is created, and every time it’s edited. | *Tree on Power Lines, No Smoke/Fire* = ‘Yes’ | Display the message: “Contact PECO at 800-841-4141 and describe the incident to them.”  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 *Blocked Street, Sidewalk, Home Access* | Fallen trees or tree limbs that are blocking the street, sidewalk or access to a home are emergencies and must be called into Municipal Radio for assistance with dispatching Street Tree Crews. | Evaluate the rule when a record is created, and every time it’s edited. | *Blocked Street, Sidewalk, Home Access* = ‘Yes’ | Display Message: “Call Municipal Radio for assistance with dispatching Street Tree Crews.”  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”. | | 6 | Workflow Rule for *On Property of Person Making Report* | If the tree is on the property of the person reporting it, then this is not a Dangerous Tree case. The property owner is responsible. | Evaluate the rule when a record is created, and every time it’s edited. | *On Property of Person Making Report* = ‘Yes’ | Display Message: “Customers cannot report dangerous trees on their own properties. The property owner is responsible for maintaining and removing trees from private property.”  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”. | | 7 | Workflow Rule for *Overgrown or Aready Fallen* | If the tree is overgrown or fallen, but NOT a 911 emergency, then this is not a Dangerous Tree case, it is a Maintenance Residential case. | Evaluate the rule when a record is created, and every time it’s edited. | *Overgrown or Aready Fallen* = ‘Yes’ | Display message: “The system has changed the *Case Record Type* to Maintenance Residential.”    Automatically change the *Case Record Type* = ‘Maintenance Residential’. | | 8 | Workflow Rule for *Growing in Vacant Building* | If the tree is growing up through a vacant building, then this is not a Dangerous Tree case, it is a Building Dangerous Vacant  case | Evaluate the rule when a record is created, and every time it’s edited. | *Growing in Vacant Building* = ‘Yes’ | Display message: “The system has changed the *Case Record Type* to Building Dangerous Vacant.”    Automatically change the *Case Record Type* = ‘Building Dangerous Vacant’. | | 9 | Workflow Rule for *Dead or Alive Tree* | If the tree’s branches do not break easily, and there are leaves on the tree in the Spring or Summeer, and there are animals living in the tree, then the tree is alive and a case cannot be opened. | Evaluate the rule when a record is created, and every time it’s edited. | *Branches Break Easily* = ‘No’ OR *Leaves in Spring and Summer* = ‘Yes’ OR *Animals Living in Tree* = ‘Yes’ OR *Dead or Alive Tree* = ‘No’ | Display message: “The system has changed the *Case Record Type* to Maintenance Residential.”    Automatically change the *Case Record Type* = ‘Maintenance Residential’. | | 10 | 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 dead or dangerous tree on a neighbor’s private property that may cause damage.   + A dangerous tree is a **dead tree with no leaves** that is in danger of collapse or is causing damage due to imminent collapse and not due to overgrowth. * 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 problems with the tree (overgrown, roots breaking concrete, dead tree with no leaves, 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.   + The L & I Department will respond to the problem within 15 days. |
| **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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