# Version History

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Description** | **Author** |
| 1.0 | 01/31/2014 | Initial Draft Before Workshop | Sreelatha SK |
| 1.1 | 02/18/2014 | Design Revisions | J. Kelly |
| 1.2 | 03/05/2014 | Revisions based on PD Website and Fire/EMS Meeting | J. Kelly |
| 1.3 | 04/04/2014 | Updated action item # 5 based on Sheryl Johnson’s 03/27/2014 response | J. Kelly |
| 1.4 | 04/07/2014 | Updated responses to action items # 2, 3, and 4 based on Kimberly Adams’ responses of 03/28/14. Updated the SLA time to 48 business hours. | J. Kelly |
| 1.5 | 04/25/2014 | Added Sheryl Johnson’s response to Action Item # 5. | J. Kelly |
| 1.6 | 06/03/2014 | Modified Workflow #3 and Follow-up fields | 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

|  |  |
| --- | --- |
| **Department** | Police Department |
| **Record Type Name** | Police Complaint |
| **Record Type Description** | Make a complaint related to services from a Police Officer or a dispatcher |
| **Process Overview** | 1. Constituent requests the service 2. The Agent creates a case by selecting the *Police Complaint* ***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 *Police Complaint* ***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).    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, In-Progress, Escalated, On Hold, and Closed | New | | Case Origin | Phone, Email, Web | Phone | | 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** | | Police Complaint | 48 | Business Hours | None | | 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** | | Police Complaint | Police Complaint | < ? > | | Service Not Needed | 311 Contact Center | < ? > |   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** | | Complaint or Compliment | Picklist  **Values:** Complaint, Compliment  **Default:** Complaint | Yes | Workflow Rule #1 | No | Is this report a complaint or a compliment? | | Physical or Verbal Abuse | Picklist  **Values:** No Abuse, Physical Abuse, Verbal Abuse, Both  **Default:** No Abuse | Yes | Workflow Rule #2 | No | Does the incident involve any physical abuse, verbal abuse, or both? | | City of Philadelphia Police | Picklist  **Values:** Yes, No  **Default:** Yes | Yes | Workflow Rule #3 | No | Does the incident involve the City of Philadelphia Police Department, instead of some other law enforcement agency? | | Officer Breaking Law | Picklist  **Values:** Yes, No  **Default:** No | Yes | Workflow Rule #4 | No | Based on the customer’s description of the incident, does it involve the officer breaking the law? (Do not ask the customer this question–determine the answer based on the incident description.) | | Fire Dept. or EMS Complaint | Picklist  **Values:** Yes, No  **Default:** No | Yes | Workflow Rule #5 | No | Is the complaint about the Fire Department or EMS? | | Streets Dept. Complaint | Picklist  **Values:** Yes, No  **Default:** No | Yes | Workflow Rule #6 |  | Is the complaint about the Streets Department? | | Abandoned Vehicle Complaint | Picklist  **Values:** Yes, No  **Default:** No | Yes | Workflow Rule #7 | No | Is the complaint about an abandoned vehicle? | | Incident Date and Time | Date/Time | Yes | None | No | When did the incident happen (date and time)? | | Police Officer or Dispatcher Name | Text (250) | No | None | No | What is the name of the Police Officer/Dispatcher (if known)? | | Vehicle Number | Text (50) | No | None | No | What is the vehicle number of the Police Officer’s vehicle (if known)? | | Follow Up Contact | Picklist  **Values:** Yes, No  **Default:** No | Yes | None | No | If this is a follow up contact, ask the customer for the case number (if available). | | Previous Case Number | Dependent Number  Controlling field = *Follow Up Contact*)  *Previous Case Number* is enabled ~~and read only~~ if *Follow Up Contact* = ‘Yes’ | No | None | No | If this is a follow up contact, what was the initial case number? | | Previous Contact Date and Time | Dependent Text(255)  (Controlling field = *Follow Up Contact*)  *Previous Contact Date and Time* is enabled ~~and read only~~ if *Follow Up Contact* = ‘Yes’ | No | None | No | If this is a follow up contact, when where the previous contact(s) made? |   **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 *Complaint or Compliment* | If the report is a compliment, advise the customer to write a letter to the Police Commissioner at 750 Race Street, Philadelphia, 19106. | Evaluate the rule when a record is created, and every time it’s edited. | *Compliment* = ‘Yes’ | Display Message “If the report is a compliment, advise the customer to send a letter to the Police Commissioner at 750 Race Street, Philadelphia, PA 19106.”  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”. | | 2 | Workflow Rule for *Physical or Verbal Abuse* | If the report is about police misconduct—physical or verbal abuse or both—the customer is responsible for filing a complaint at PAC. | Evaluate the rule when a record is created, and every time it’s edited. | *Physical or Verbal Abuse* = ‘Physical Abuse’ OR ‘Verbal Abuse’ OR ‘Both’. | Display Message “If the report is about police misconduct—physical or verbal abuse or both—the customer is responsible for filing a complaint with the Police Advisory Commission (PAC) at 990 Spring Garden St, 7th Floor, Suite 705, Philadelphia, PA 19123 or 215-685-0891.”  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”. | | 3 | Workflow Rule for *City of Philadelphia Police* | If the complaint is about a law enforcement agency other than the City of Philadelphia Police Dept., refer to the help article on how to report the complaint. | Evaluate the rule when a record is created, and every time it’s edited. | *City of Philadelphia Police* = ‘No’ | Display Message “If the complaint is about a law enforcement agency other than the City of Philadelphia Police Dept., direct the caller to contact the agency involved to report the complaint.”  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”. | | 4 | Workflow Rule for *Officer Breaking Law* | If the complaint involves the Police Officer breaking the law, the customer is responsible for filing a complaint with the Police Advisory Commission (PAC). | Evaluate the rule when a record is created, and every time it’s edited. | *Officer Breaking Law* = ‘Yes’ | Display Message “If the complaint involves the Police Officer breaking the law, the customer is responsible for filing a complaint with the Police Advisory Commission (PAC) at 990 Spring Garden St, 7th Floor, Suite 705, Philadelphia, PA 19123 or 215-685-0891.”  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 *Fire Dept. or EMS Complaint* | If the complaint is about the Fire Department or EMS, submit a Complaint Against Fire or EMS service request. | Evaluate the rule when a record is created, and every time it’s edited. | *Fire Dept. or EMS Complaint* = ‘Yes’ | Display message: “The system has changed the Case Record Type to Complaint Against Fire or EMS.”    Automatically change the *Case Record Type* = ‘Complaint Against Fire or EMS’. | | 6 | Workflow Rule for *Streets Dept. Complaint* | If the complaint is about the Streets Department, submit a Complaint (Streets) service request. | Evaluate the rule when a record is created, and every time it’s edited. | *Streets Dept. Complaint* = ‘Yes’ | Display message: “The system has changed the Case Record Type to Complaint (Streets).”    Automatically change the *Case Record Type* = ‘Complaint (Streets)’. | | 7 | Workflow Rule for *Abandoned Vehicle Complaint* | If the complaint is about an abandoned vehicle, submit an Abandoned Vehicle service request. | Evaluate the rule when a record is created, and every time it’s edited. | *Abandoned Vehicle Complaint* = ‘Yes’ | Display message: “The system has changed the Case Record Type to Abandoned Vehicle.”    Automatically change the *Case Record Type* = ‘Abandoned Vehicle’. | |
| **Escalation Rule** | If *Follow Up Contact* = ‘Yes’ then send the email to a different email address (Sgt. Masi) for escalated follow up complaints. In the escalated email include the initial case number and the previous contact dates and times. |
| **Agent Instructions** | * Purpose: To report a complaint about service from a Police Officer or Dispatcher. * Contact fields: Enter the customer’s name, address and contact information.   + Advise the customer that this information is requested in the event the department needs to obtain more information to follow up on this request. Ask the customer, “Are you sure you want to submit this request anonymously?” * Service Address fields: Enter the address of the location where the incident occurred.   + Verify that you entered the address correctly by repeating the address back to the customer. * Description field: Enter a summary of the incident or reason for the complaint and any other individuals involved. * Advise the customer: * A service request may be entered when a customer expresses dissatisfaction with a Police Officer’s or Dispatcher’s response or demeanor. Examples: Lack of response or rude behavior. * Do **NOT** refer customers to Community Relations Officers under any circumstances. * The department will respond within 48 business 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** | Closed--Police Department Investigating |
| **Other Information** |  |
| **ESRI/GIS Information** | The GIS layers to be displayed for the service request location are:   * Police Districts * Police Divisions * Police Service Areas   The GIS features to be displayed for a selected address are:   * Police Stations * Crime Incidents * Open Salesforce cases for Case Record Type = Police Department Complaint * 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** |  |
| **Actions** | 1. Verify with Police Dept.: To where should emails about complaints be sent? Police Communications/Radio? 2. Kimberly: Provide information to add to the Agent Instructions regarding what happens to a complaint after it is entered. *Per Kimberly on 03/28/2014: This information would come from the Police Department liaison, not Philly311.* 3. Kimberly: Verify the SLA for this service request. *Per Kimberly on 03/28/2014: The department will respond within 48 business hours to discuss and resolve the issue.* 4. Kimberly: Provide the help article that explains how to submit complaints to law enforcement agencies other than the City of Philadelphia Police Department. (See “City of Philadelphia Police” field and workflow.) *Per Kimberly on 03/28/2014: I’m not sure that we agreed to create an article for this issue. We would need to reach out to these other enforcement agencies to find out how they accept complaints. As they are not City agencies, we would not generally provide information for them in an article. We would be just directing the customer to that agency.* 5. Sheryl: Do we want to provide default values for the fields in this service request or do we want the 311 Agent to manually complete each field? *Per Sheryl on 03/27/2014, we should provide default values with Other as an option that requires additional clarification. 4/11/14 – One of the default values will equal Other. When this field is chosen the agent will provide the additional information the description field.* |

# Approvals after Requirements Definition Workshop

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