WISCONSIN DEPARTMENT OF HEALTH SERVICES
Division of Medicaid Services
1 W. Wilson St.
Madison WI 53703

To:	Genesys User Guide Users
From:	Jori Mundy, Bureau Director Bureau of Eligibility and Enrollment Policy
Re:	**Genesys User Guide Release 23-02**
Release Date:	07/20/2023
Effective Date:	07/20/2023

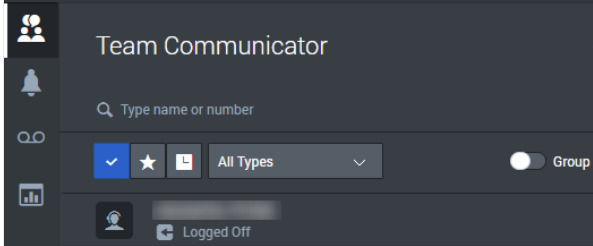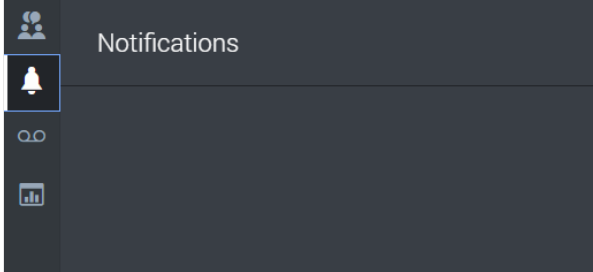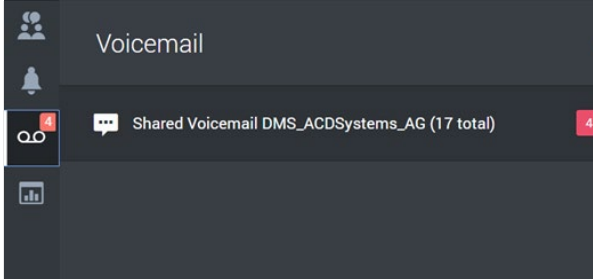| EFFECTIVE DATE	The following policy additions or changes are **effective 07/20/2023** unless otherwise noted. **Underlined text denotes new text. Text with a strike through it denotes deleted text.**
POLICY UPDATES	
3.1 Agent Desktop Workspace	Updated sidebar and top navigation bar functions and screenshots.
3.2 Connect View Tab	Updated search options and screenshots.
3.4 Voice Inreraction Window	Added information about the Interaction Bar and Case Information tabs.
4 Setting a Status	Clarified use of Ready and Not Ready statuses.
5.1 Receiving a Call	Updated screenshots.
7.2.2 Explore Tab: Searching for and Listening to Calls	Added three new sections to explain how to search for calls, listen, and save the searches for future use.
11.6 Submitting a Genesys Support Ticket	Updated escalation email.

Table of Contents

3.1 Agent Desktop Workspace

(Video instructions available: [Agent Desktop Workspace](#))

The Agent Desktop workspace is split between the left sidebar and the top navigation bar. The sidebar has links to useful tools that open in a pop-up menu. The top navigation bar includes two tabs and your current status.

Sidebar

The sidebar links to:

Team Communicator

Used to dial external numbers and internal contacts, set certain numbers or contacts as favorites, and view a history of outbound calls.

Notifications

Indicates any potential errors in the system.

Voicemail

Indicates when any voicemails are in assigned queue.

Performance Tracker

Provides information on the number of internal, outbound, and inbound calls for the day.
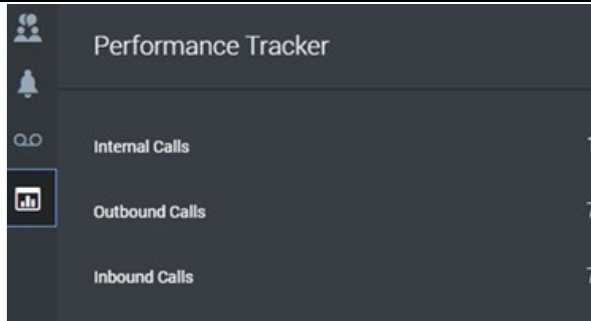
Help
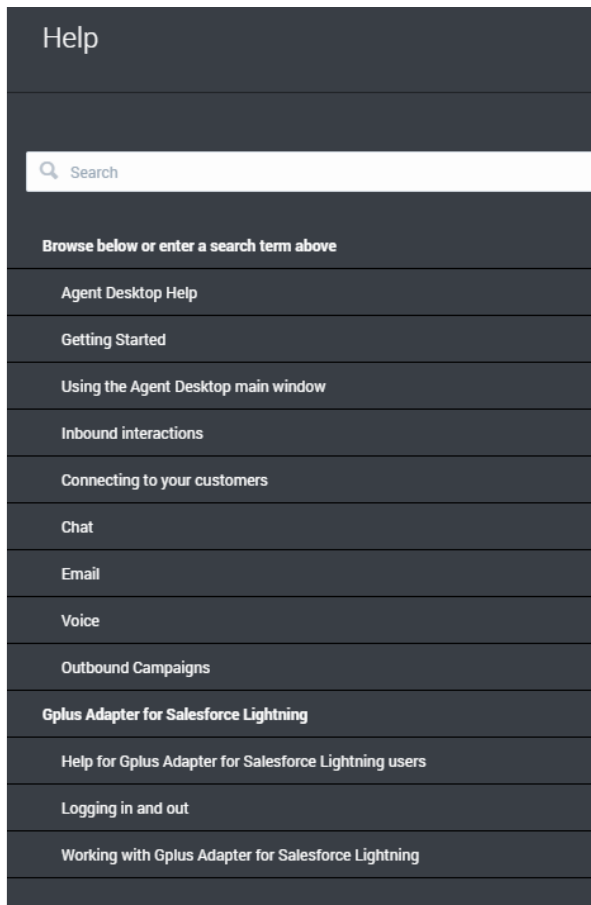
Includes a search field and a browsable library to help answer questions and provide more information about Genesys.

The Help section is a secondary source of information that supplements the Genesys user guide.
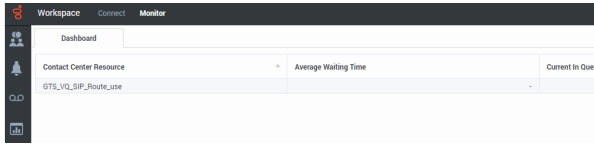
Top Navigation Bar

The Top navigation bar links to:

Connect View Tab	Shows the media you use, your current status, and previous calls. SEE 3.2 CONNECT VIEW TAB
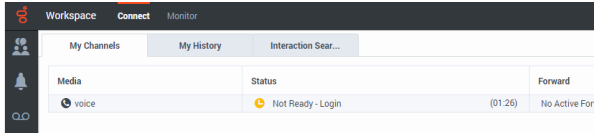
Monitor View Tab

Shows the specific statistics of your agency. This information may not be available. SEE 3.3 MONITOR VIEW TAB

Agents Status

Shows your status. SEE 4 SETTING A STATUS

Main Menu

Used to log off the Agent Desktop. See 2.2 LOGGING OFF THE AGENT DESKTOP
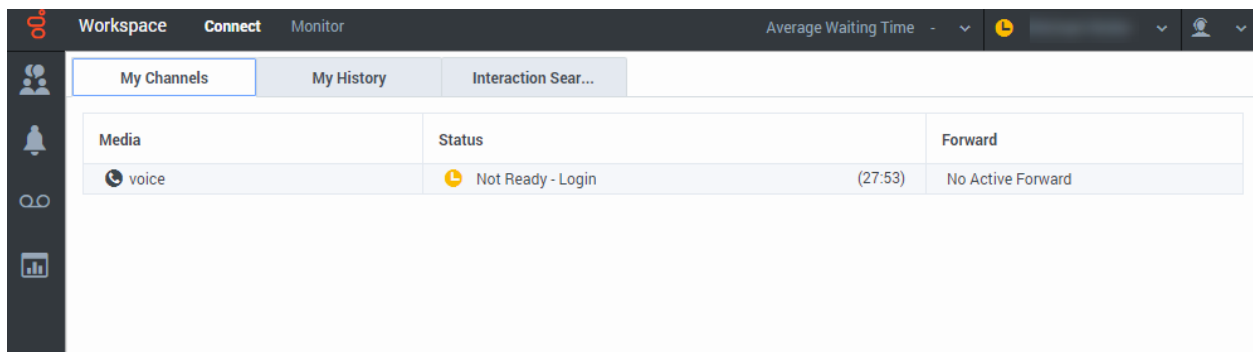
3.2 Connect View Tab

(Video instructions available: [Connect View Tab](#))

Agents can see call data using the Connect View Tab's three views.

My Channels

The My Channels view summarizes the type of media you use, current status, and amount of time in the current status.

Show/Hide an example of the page

My History

The My History view shows previous calls. This view is the best way to search for a call.

Inbound calls have a green arrow next to the phone icon.

Outbound calls have a yellow arrow next to the phone icon.

Show/Hide an example of the page

Adjust the date slider to find a call during a certain time frame.

Or, use the Advanced search feature to set specific search criteria by date.

Here are the steps to search for a call using Advanced search:

1. Select the date range from the drop-down menu. (Start Date, End Date).

2. Select the date condition (On, On or after, Before, Between).

3. If searching using a date range, click **Add condition** and select **Start Date** or **End Date**.
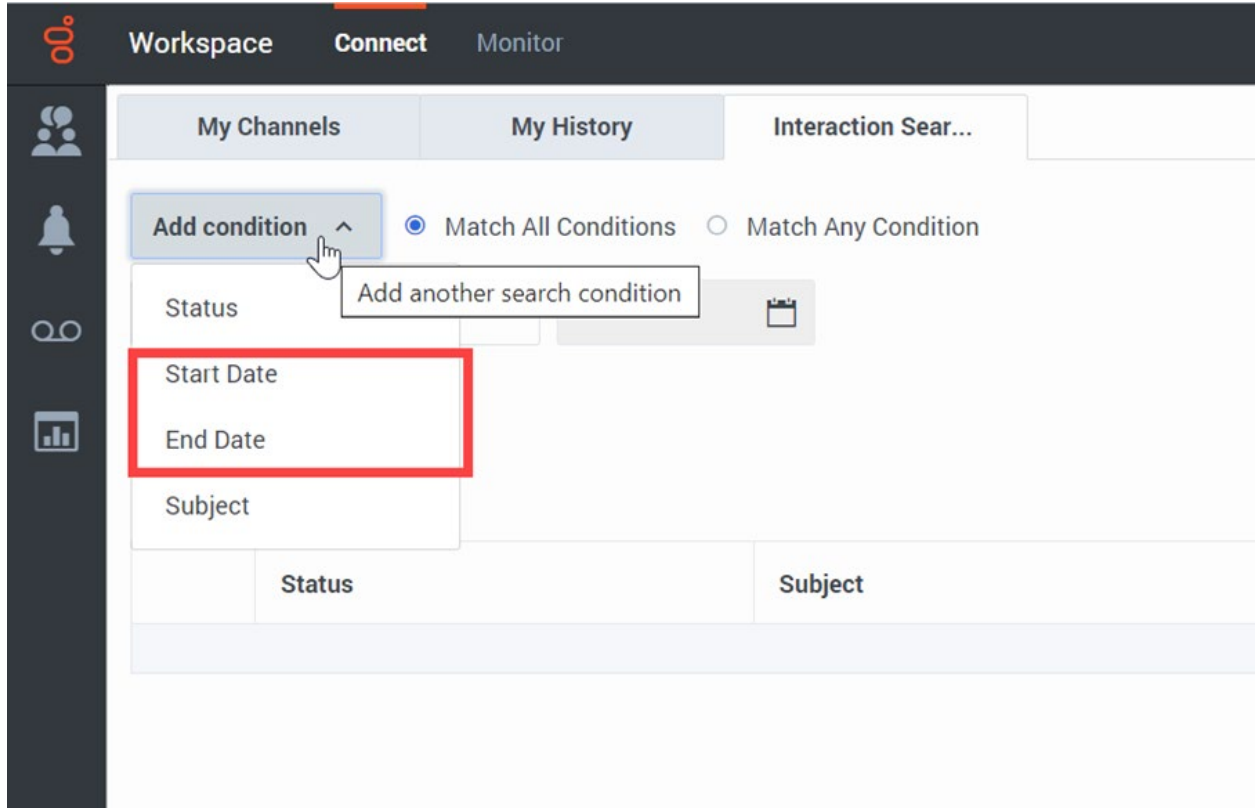
4. Select the date or dates from the calendar.
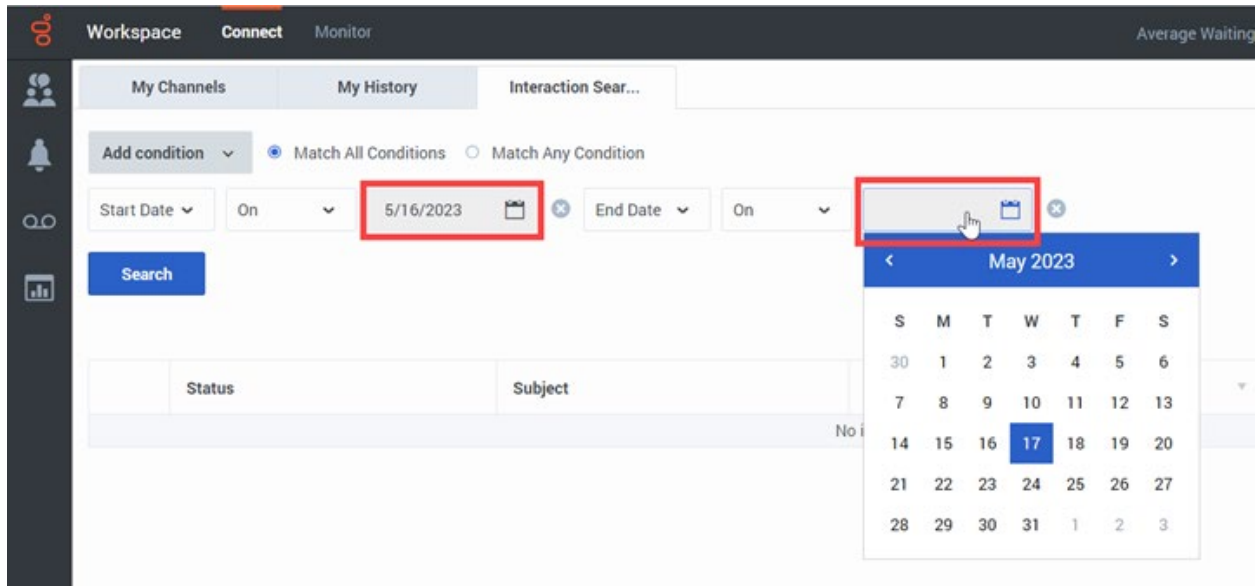
Interaction Search

Do not use the Interaction Search view to search for calls. Always use the My History view instead.

3.4 Voice Interaction Window

(Video instructions available: Voice Interaction Window)

The Voice Interaction window opens during a call. It contains an Interaction Bar for call functions and the "Case Information" section for call information and disposition codes (if your agency uses them).
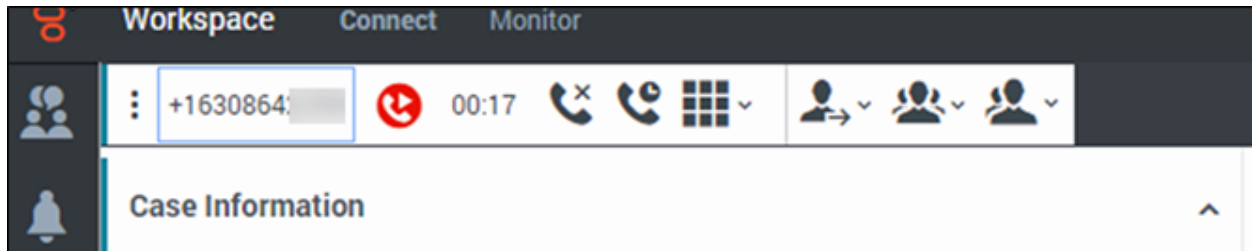
Interaction Bar

The Interaction Bar is displayed under the Connect View and Monitor View tabs.

Here, agents can:

Button		Function
Phone Number		View the phone number of the caller.
Hang up		End current call.
Hold		Put call on hold (SEE 5.3 PLACING A CALL ON HOLD).
Keypad		Enter a number as a call prompt. For example, "Press 1 for more options."
Transfer		Transfer the call (SEE 5.4 TRANSFERRING A CALL).
Conference		Conference-in another person, agent, or queue (SEE 5.4.2 INSTANT CONFERENCE).
Consultation		Speak with another person, agent, or queue privately while putting the caller on hold (SEE 5.4.3 CONSULT CALL).

Case Information

The Case Information section displays call information for inbound and outbound calls.
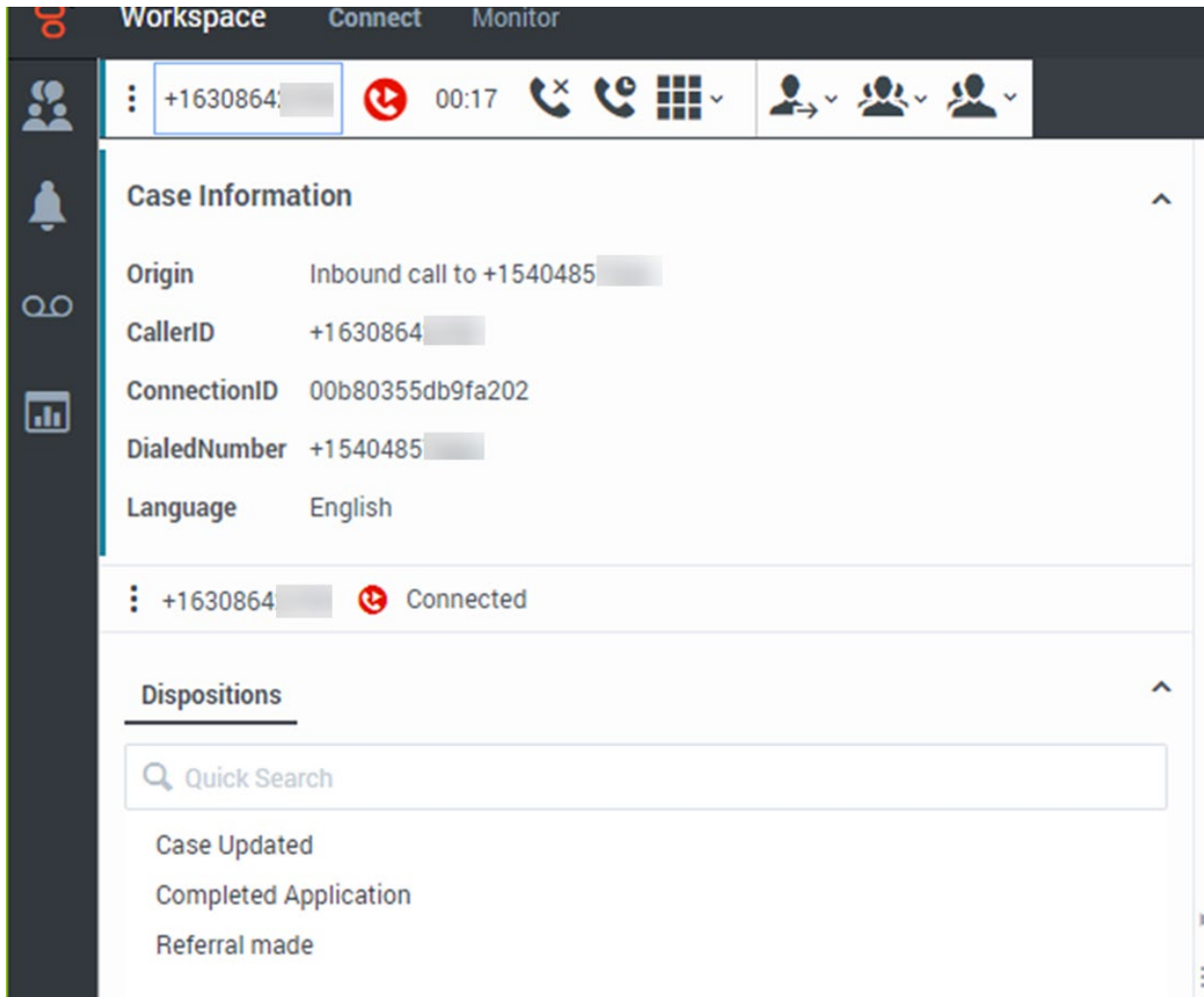
Information displayed for inbound and outbound calls includes:

Inbound Calls	Outbound Calls
- Origin - Caller ID - ConnectionID - Dialed Number - Language used on calls in this queue - Disposition codes	- Origin - Disposition codes

4 Setting a Status

Video instructions available: <u>Setting a Status</u>

Set a status to show the system and other agents your availability to receive calls. Select your name to view the list of statuses, then select the appropriate status.

When on a call, you are in a "Ready" status and do not have to change the status. When done with a call, select any of the "Not Ready" statuses. Each agency sets their own guidelines for statuses, so check with your agency for when to use each status. Set the status back to "Ready" when you are ready to receive calls.

~~Use statuses to show your availability and ability to receive calls to other agents.~~

~~Select your name to view and select the appropriate status. Change your status when on a call as statuses do not automatically change when accepting a call. Your status can be seen by other agents and supervisors in your consortium, which helps them know your current availability. Agencies set their own guidelines on when to use each status. Check with your agency to confirm.~~

The statuses may include:

- Ready
- Not Ready – Case Processing
- Not Ready – Extended After Call Work
- Not Ready – Last Call
- ~~Not Ready – Login~~
- Not Ready – Lunch
- Not Ready – Meeting
- ~~Not Ready – No Answer~~
- Not Ready – On Break
- Not Ready – Other
- Not Ready – Supervising
- Not Ready – Technical Issues
- Not Ready – Training
- ~~After Call Work~~
- Logoff

You can check other agents' statuses by typing their name in the Team Communicator.

~~If an agent receives a call and does not answer, they are placed in a "Not Ready – No Answer" status until they change to a "Ready" status.~~

5.1 Receiving a Call

(Video instructions available: Receiving a Call)

A received call appears as a notification at the bottom right-hand corner of the Genesys window. It is encouraged to answer the call on your phone rather than Genesys. You can only receive a call if your status is listed as "Ready."

Notification of Call

A call notification appears at the bottom right-hand corner of the Genesys window to show an incoming call.
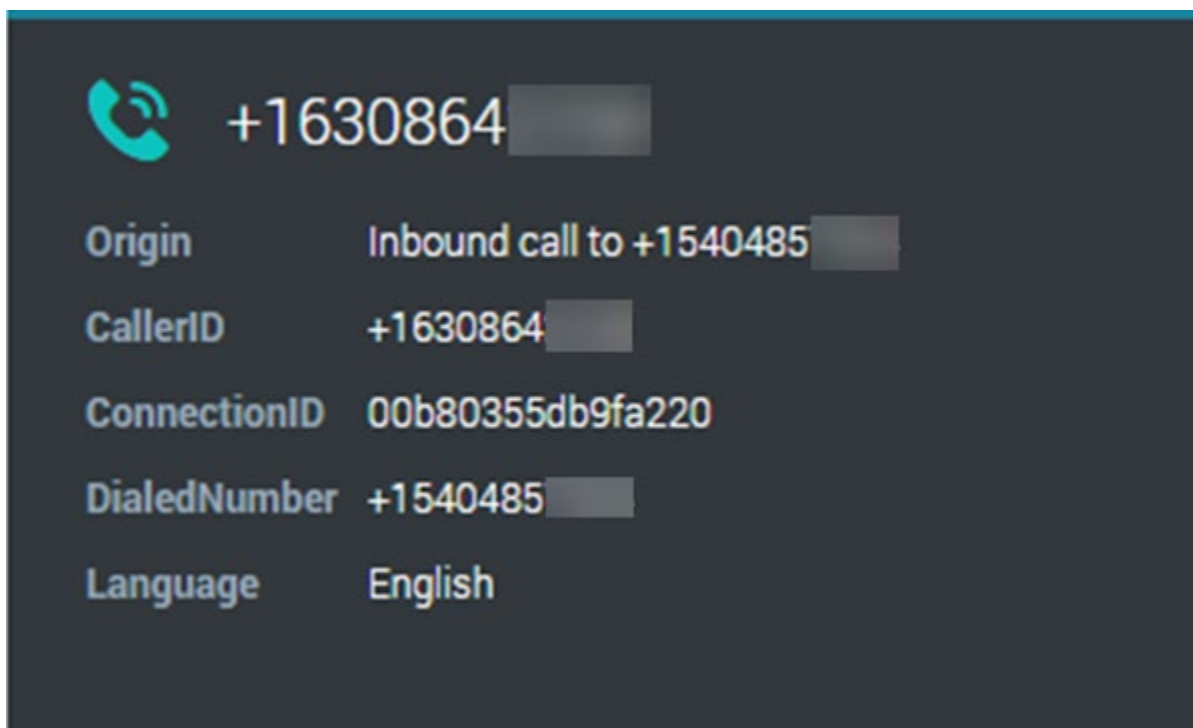

The call notification includes:

- Name or number of the caller
- Origin of the call
- Caller ID
- Connection ID
- Dialed number
- Language and skill you are currently in

Answering the Call

There is often a short pause between when the call is shown on the desktop and when your phone rings.

1. Answer the call using the phone connected to your Genesys account. Once a call has been answered, the case information (call information) of the caller displays (listed above).
2. Enter a disposition code at the end of the call if required by your agency. Check with your agency if the disposition code is required.
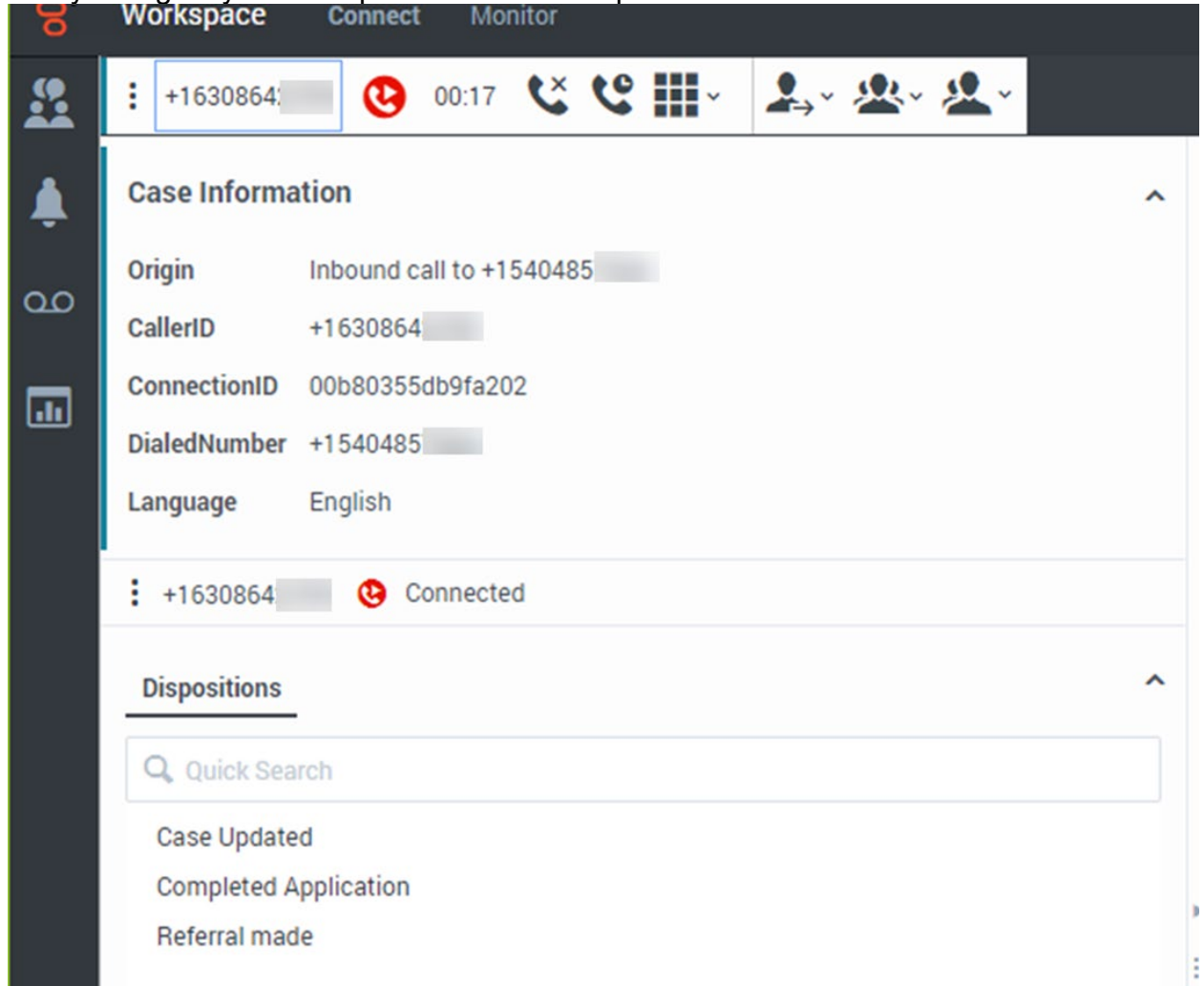
3. Complete the call by hanging up the receiver or selecting **End Call**.
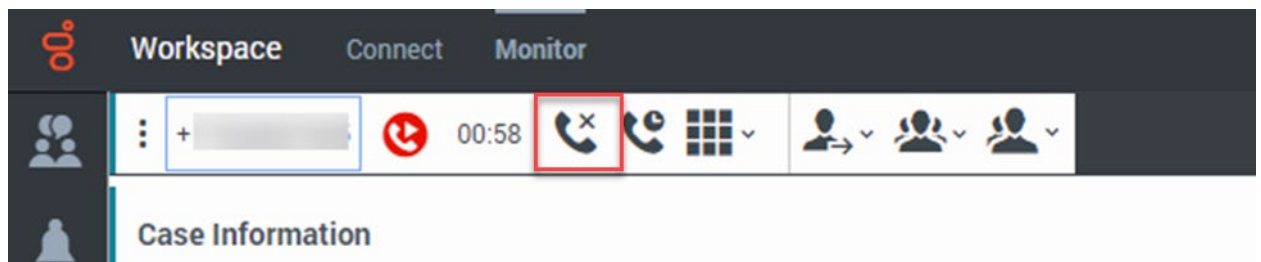
After ending a call, agents are placed into an after-call work status for 20 seconds by default. If more time is needed to wrap up the call, you can select another appropriate "Not Ready" status. When ready for another call, change your status to "Ready."

7.2.2 Explore Tab: Searching for and Listening to Calls

7.2.2.1 Searching for Calls (Video instructions available: Searching for Calls)

7.2.2.2 Sorting Results and Listening to Calls (Video instructions available: Sorting Results and Listening to Calls)

7.2.2.3 Saving Searches (Video instructions available: Saving Searches)

The Explore Tab allows a supervisor to search for and listen to calls. Specific searches can be saved and re-run in the future.
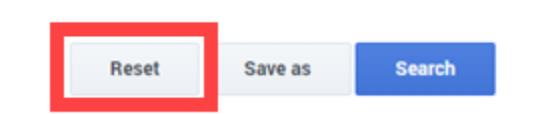
7.2.2.1 Searching for Calls

(Video instructions available: Searching for Calls)

There are several ways to search for a call from the Explore tab including:

- Date
- Agent name
- Consortia
- Call type (inbound or outbound)
- Phone number of the caller
- ConnectionID
- Number of segments
- Call duration

Select **Reset** at any time to clear all the search criteria.

Search by Date

To search by date, select a **date range** from the drop-down menu menu in the Date Range section.
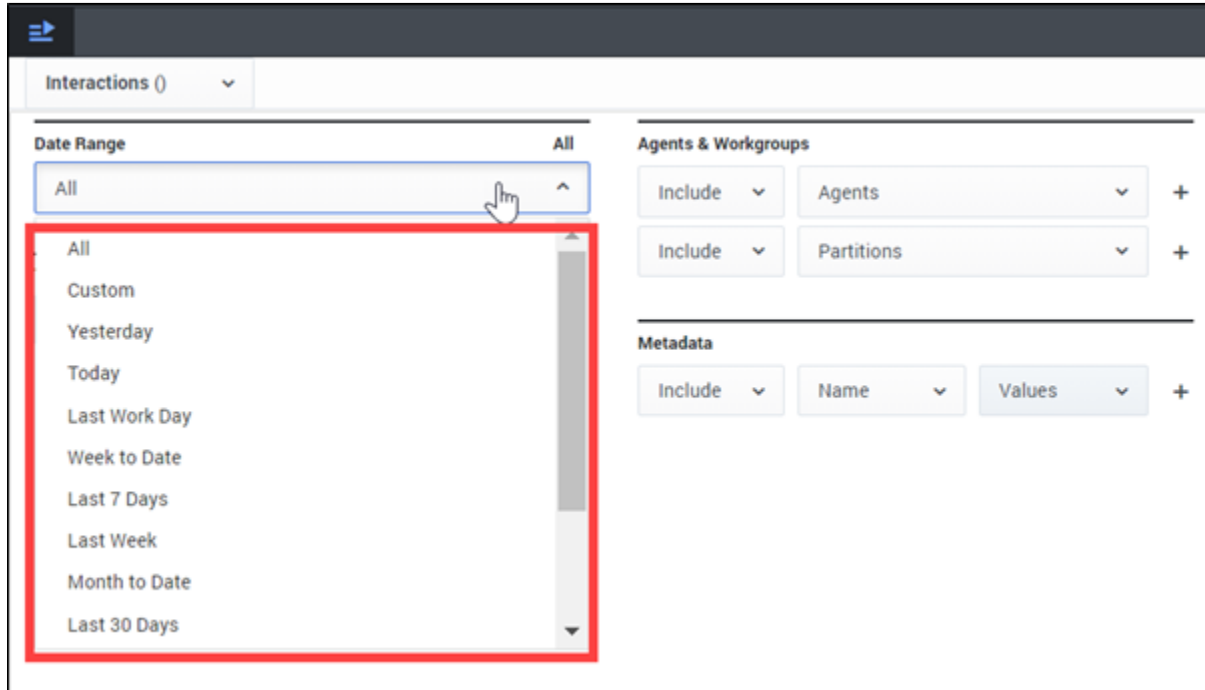
Choose **Custom** to display From and To fields and enter your own range of dates and times.
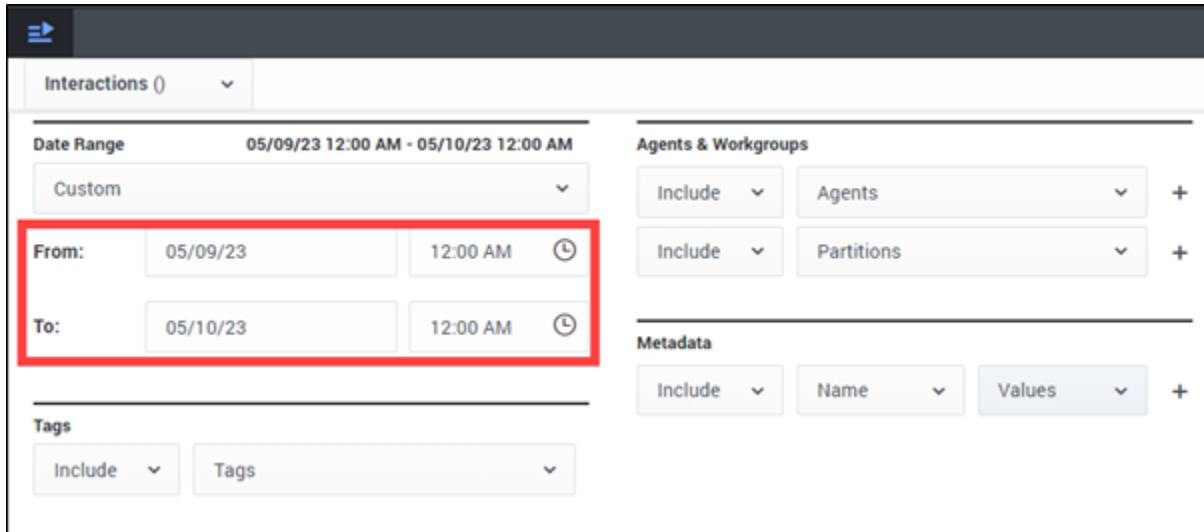
Search by Agent Name

To search by agent name, select a name from a **consortium folder** in the Agents & Workgroups section. Multiple agents can be selected one-by-one, as a consortium, or as multiple consortia.
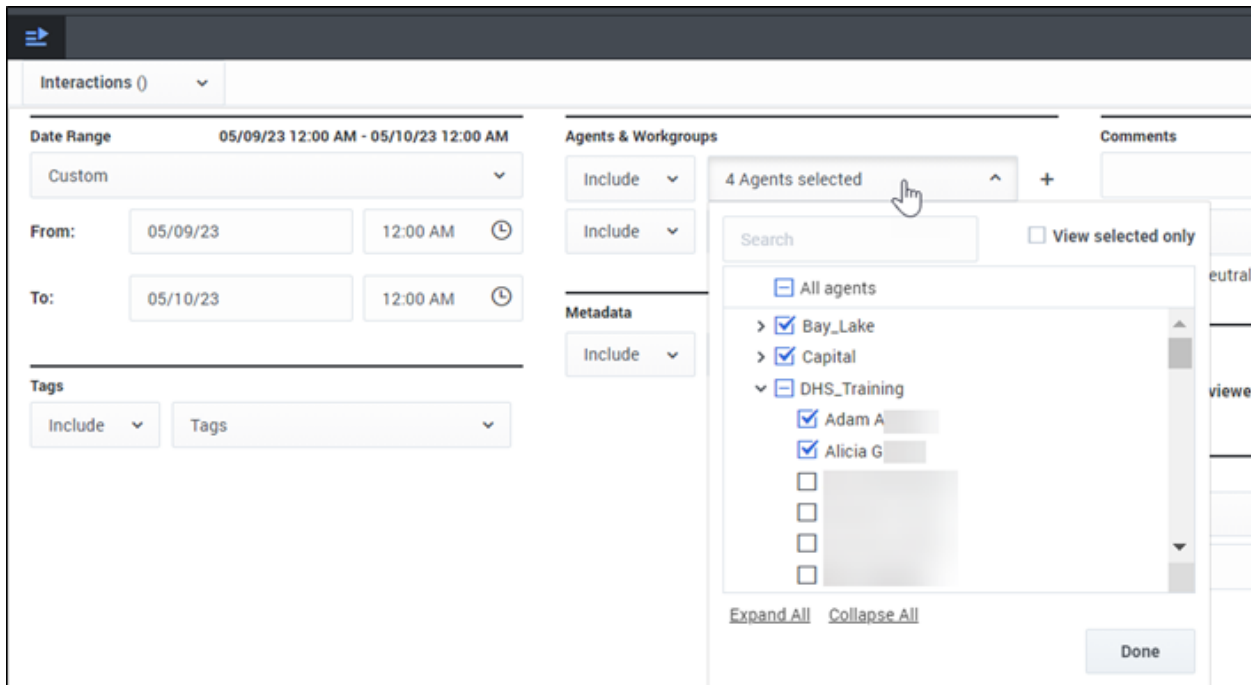
Search by Call Type

To search by the inbound or outbound call type, select **callType** from the **Name** drop-down menu in the Metadata section.

Then select **Values** and enter either **Inbound** or **Outbound**.
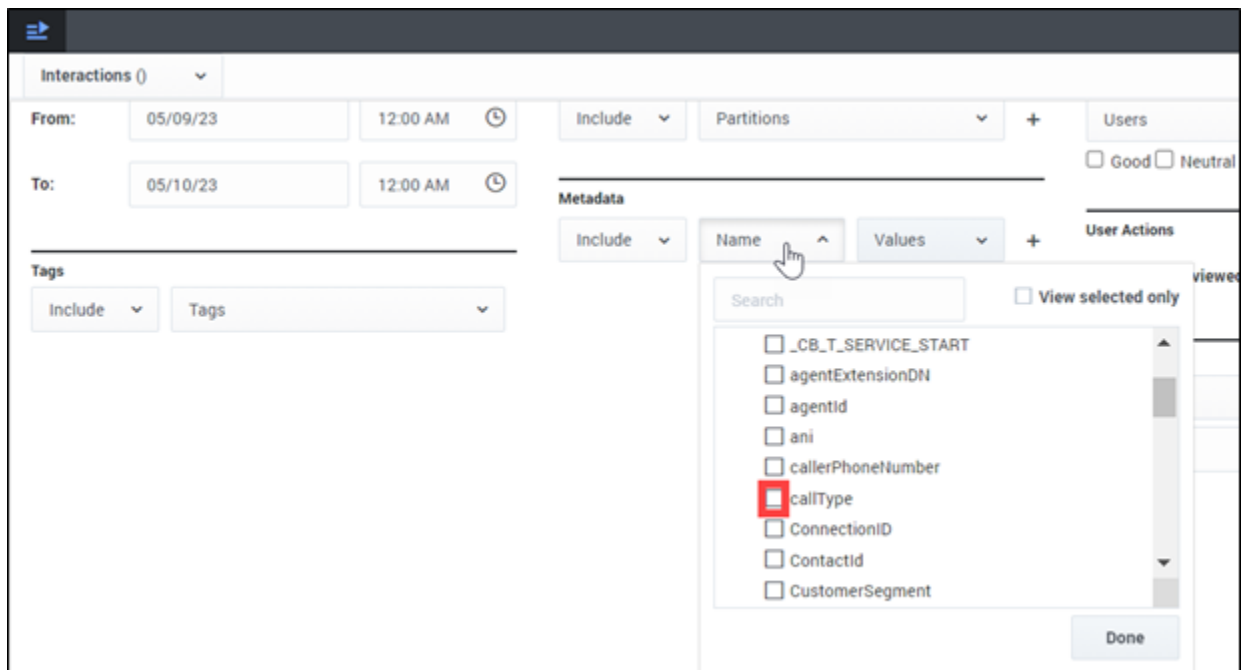
Search by Caller Phone Number

To search by the caller's phone number, select **ani** from the **Name** drop-down menu in the Metadata section.
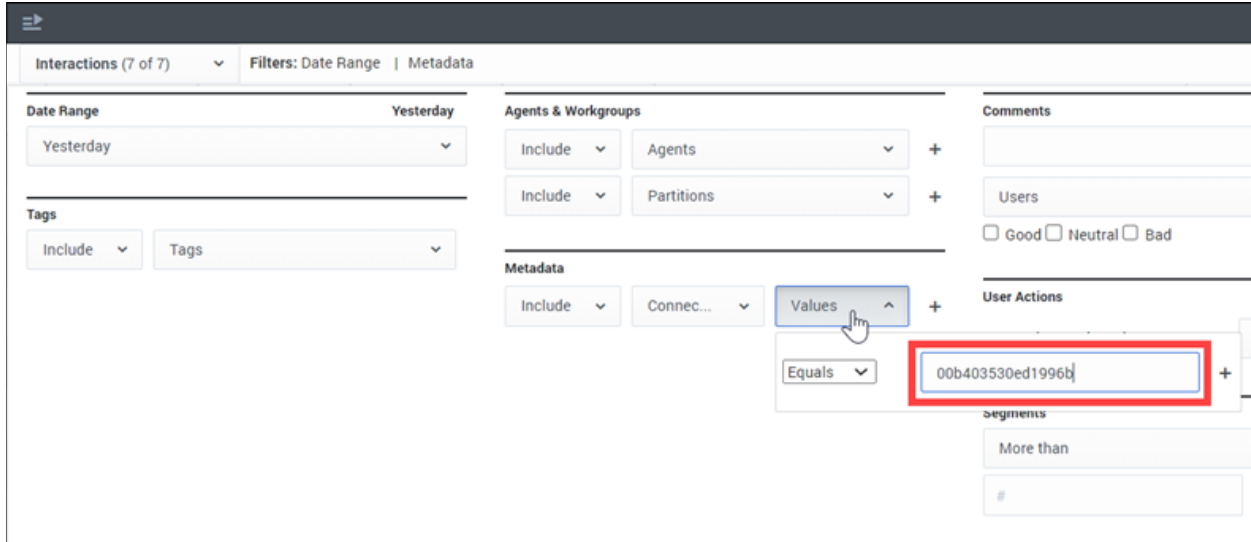
Then select **Values** and enter the phone number. Be sure to add **+1** at the start of the phone number. For example: +16081234567.
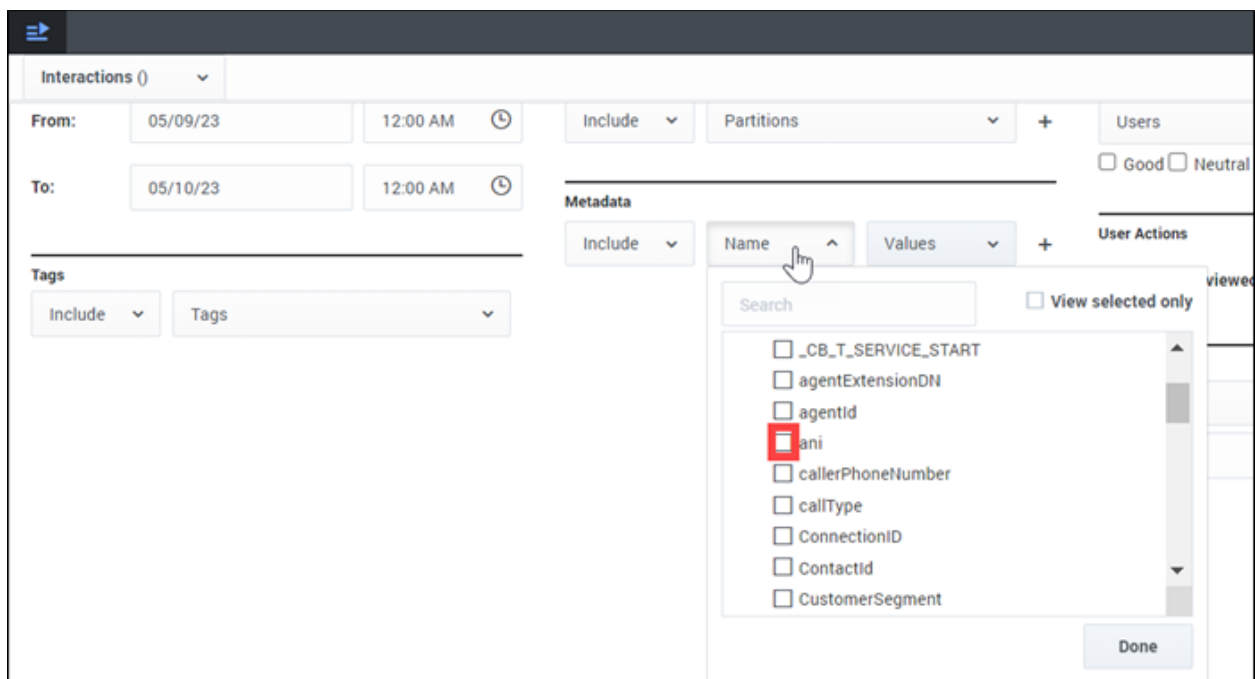
Search by ConnectionID

To search by ConnectionID, select ConnectionID from the Name drop-down menu in the Metadata section.

Then select **Values** and copy and paste the **ConnectionID**.
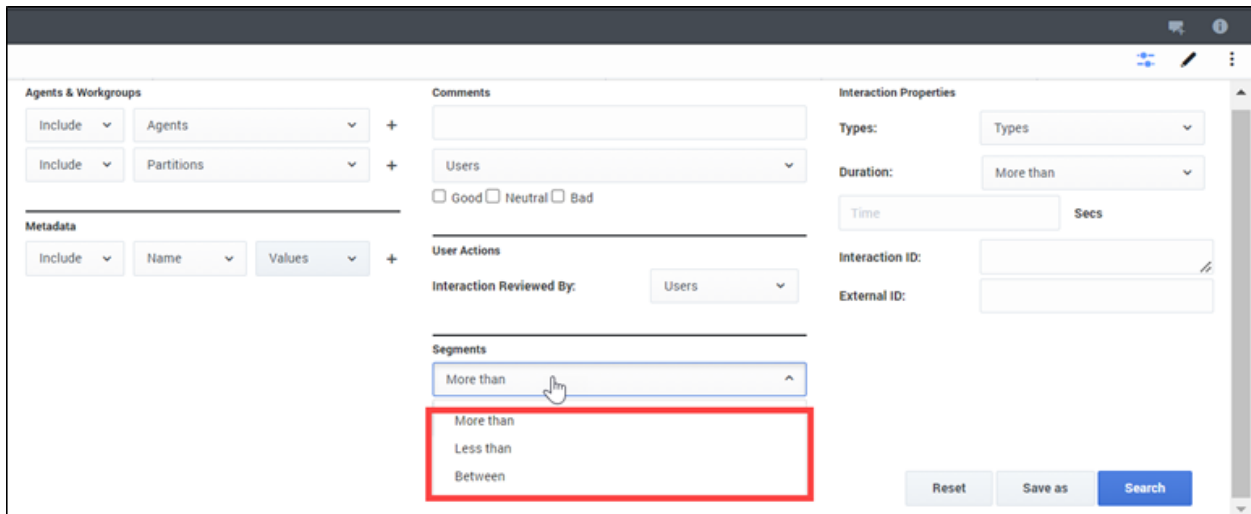
Search by Number of Segments

To search by number of call segments, select **More than**, **Less than**, or **Between** from the Segments section drop-down menu. Then enter the number of segments in the **Segments** field.

Examples of call segments include ATS signature and call transfers.

Search by Call Duration

To search by call duration, select **More than**, **Less than**, or **Between** from the **Duration** drop-down menu in the Interaction Properties section. Then enter the number of seconds in the **Secs** field.

Comments

Users ▼

☐ Good ☐ Neutral ☐ Bad

User Actions

Interaction Reviewed By: Users ▼

Segments

More than ▼

2 | **Segments**

Interaction Properties

Types: Types ▼

Duration: More than ▲

Time

| More than |
| Less than |
| Between |

Interaction ID:

External ID:

Reset | Save as | **Search**
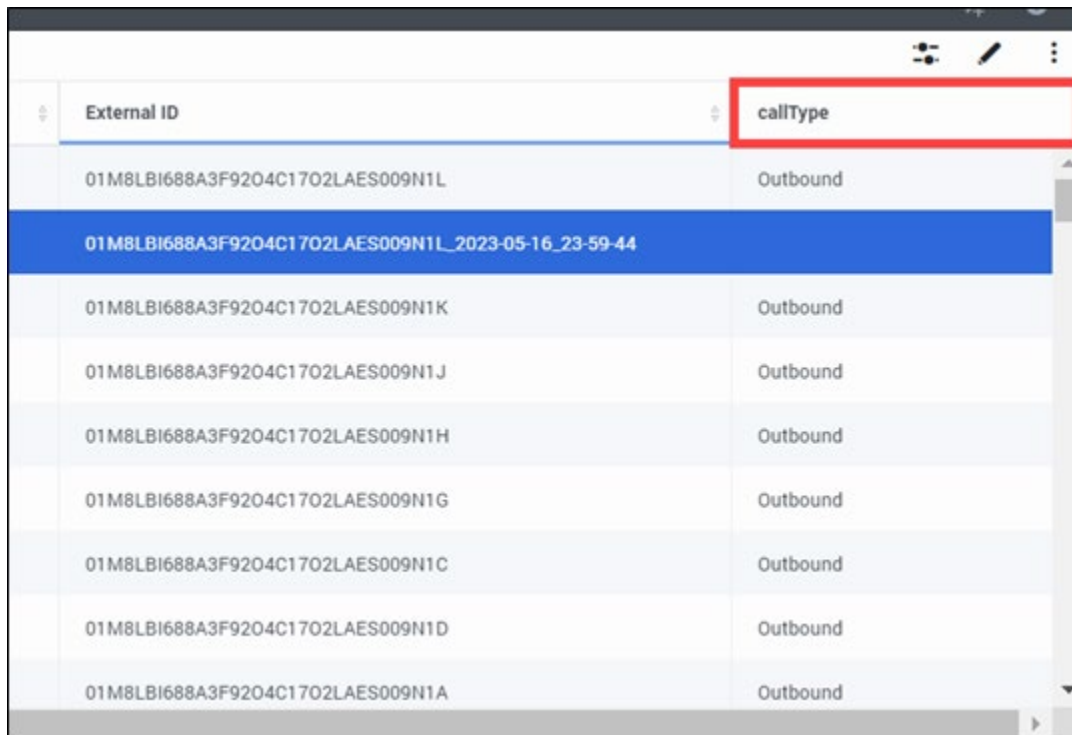
7.2.2.2 Sorting Results and Listening to Calls

(Video instructions available: Sorting Results and Listening to Calls)

After searching for a call, you can sort the results and listen to calls in the Explore Tab.

Sorting Results

The search results columns can be adjusted as needed. For example, if searching by inbound calls, you can add the callType column to the search results.

To adjust the search results columns, select the **Select Columns** icon that looks like a pencil on the results screen.

Then select the columns to add or remove. Note that any adjustments made to the results columns will be saved for future searches.

Select arrows in a column to sort the results by ascending or descending order.

Adjusting Search Criteria

To return to the search page and make adjustments to the search criteria, select the Search Filters sliders icon that looks like sliders.

Do not use the back button on your browser to return to the search page.
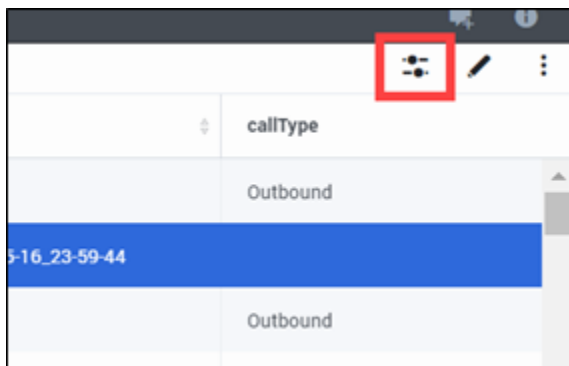
Listening to Calls

To listen to a call, use the play button next to the segment of call on the search results page.

Some calls may have multiple segments for the ATS signature or if the call was transferred. Click the plus icon next to the call to see the segments.

7.2.2.3 Saving Searches

(Video instructions available: Saving Searches)

Saving a search in the Explore Tab can be helpful when the same criteria will be used multiple times. For example, saving a search that groups yesterday's calls together.
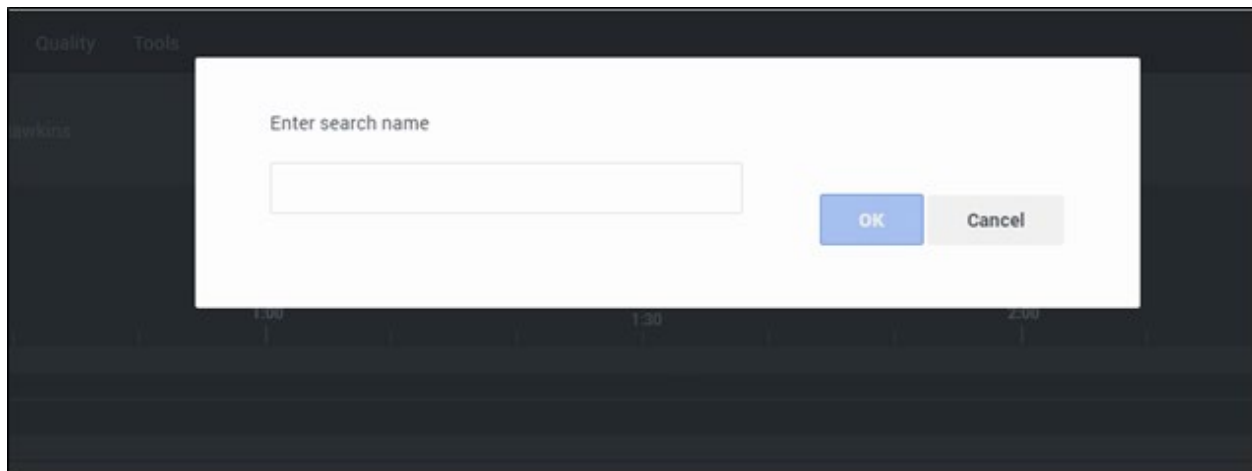
Saving a Search
To save a search, confirm the criteria to use and select **Save as** on the search page.

Enter a name for the search and select **OK**.

Viewing Saved Searches
To view your saved searches, select **Explore**, then **Saved Searches**.
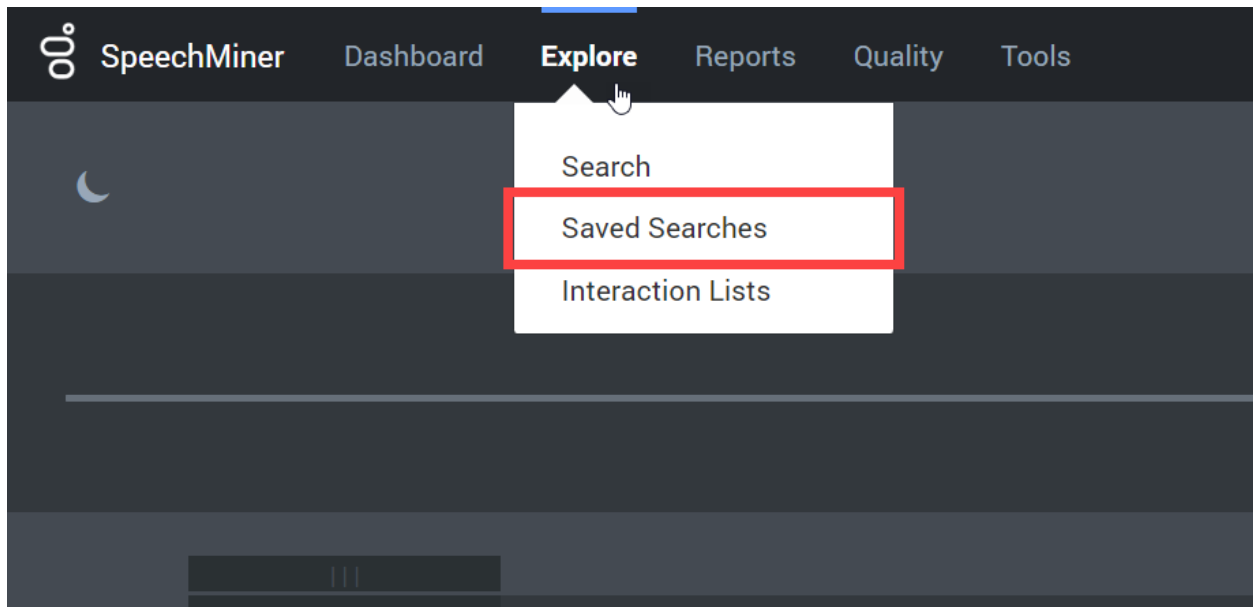
Running Saved Searches

To run a saved search, use the play button next to the search on the Saved Searches page.

Editing Saved Searches

To edit a saved search, first run the search. This will open a new browser window.

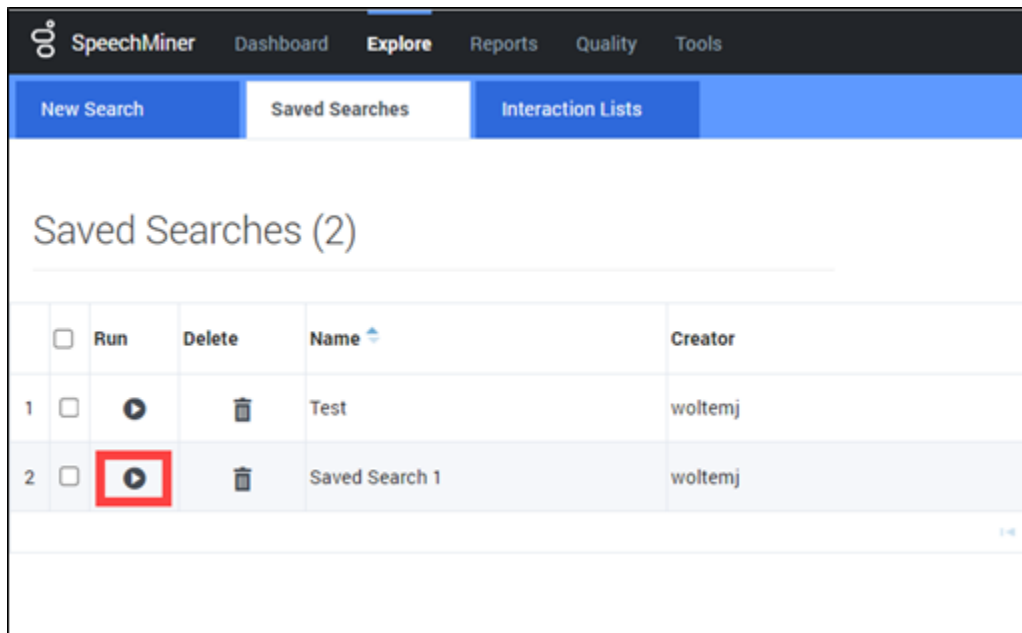Then select the **Search Filters** icon that looks like sliders to return to the search page.
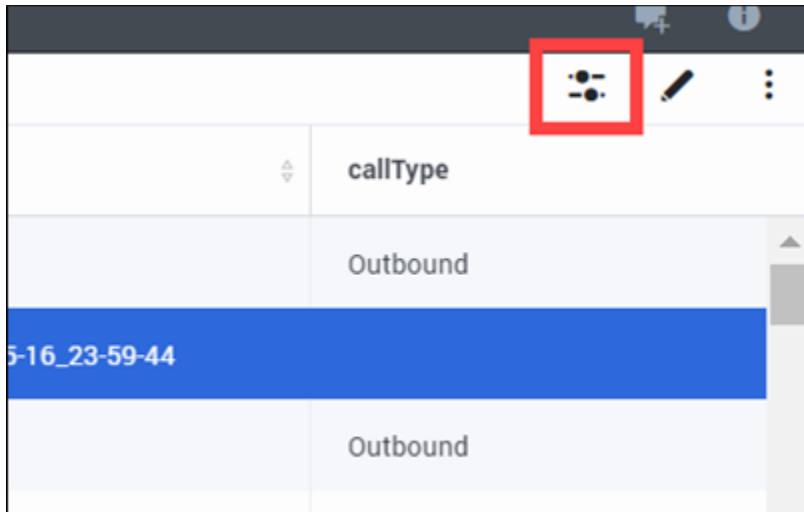
Make any necessary changes, then select **Save** to update the saved search or **Save as** create a new saved search.
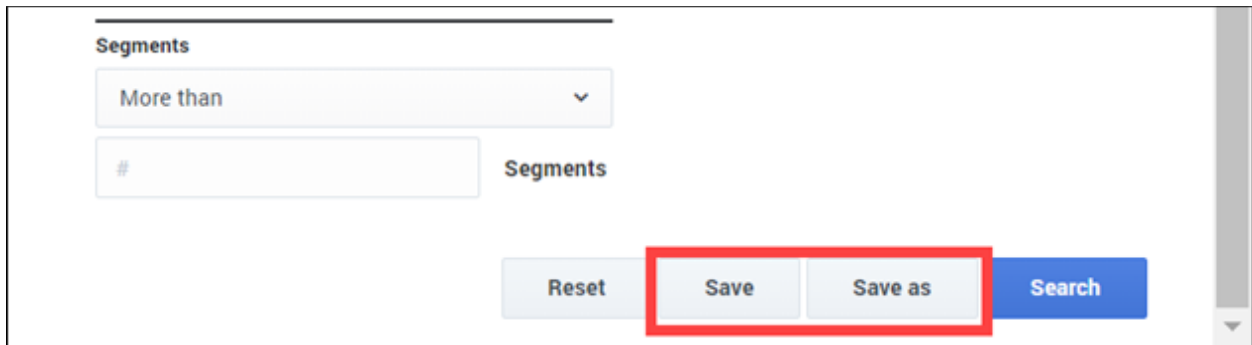
Deleting a Saved Search

To delete a saved search, select the **trash icon** next to the search. Select **Yes** in the pop-up menu to confirm.

11.6 Submitting a Genesys Support Ticket

After referring to the Troubleshooting sections of this guide and the issue is still not resolved users must submit requests to the State of Wisconsin Help Desk for additional troubleshooting support. The Genesys Cloud Support Team receives and tracks support requests via the Wisconsin Help Desk.

General questions can be sent to: dhsgenesyscloudproject@dhs.wisconsin.gov

Examples of general questions include:

- How do I open a specific report?
- How do I subscribe to a specific report?

11.6.2 Opening a Ticket

Tickets can be opened by using one of the following ticket methods:

- Email helpdesk@wi.gov**(preferred)**
- Phone 608-261-4400 (Madison) │ 866-335-2180 (Toll-free)
- State employees may use the Cherwell Portal

To expedite the triage process, it's strongly recommended to include the following in the subject line and body of the email.

Subject Line

The subject line needs to clearly describe the overall issue and mention Genesys.

Do	Don't
"Cannot log into Genesys Agent Desktop" "Unable to download recordings in Genesys Interaction Recording" "Genesys new user request" "Please set the Genesys Technical Business Event"	"Genesys" "Problems" "Genesys Issue" "Genesys isn't working" "Trouble with Genesys"

Description

Include "**Please assign to DHS Genesys Cloud Support Team**" in the beginning of the email or description (not in the subject line).

Include a description with any details relevant to the issue(s), including:

- Name and Username
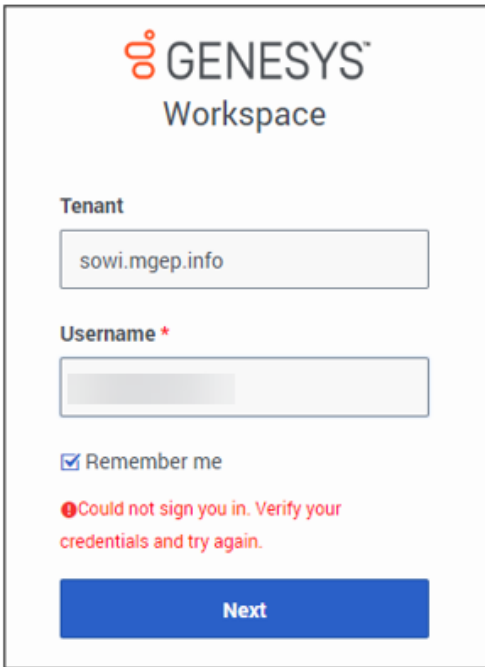- Genesys Place the agent is logged into

- Connection ID (for calls)
- Screenshots
- Thorough description of what the user is experiencing
- Time/date of the incident
- Any error messages
- Any steps that could be used to reproduce the problem
- Any troubleshooting steps completed before opening the ticket

Show/Hide Example email ticket

	To	○ helpdesk@wi.gov;
Send	Cc	
	Bcc	
	Subject	Unable to log into Genesys Agent Desktop

Hi,

I am unable to log into Genesys Agent Desktop. When I attempt to log in, I get the following error

My user name is: ▮▮▮▮▮▮▮

This has been occurring this morning, but I was able to log in yesterday. I have reset my WAMS password.

Best regards,

Note:	Tickets missing the above information may be routed incorrectly or take longer to gather information necessary to resolve.