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Division of Medicaid Services
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To:	Genesys User Guide Users
From:	Jori Mundy, Bureau Director Bureau of Eligibility and Enrollment Policy
Re:	**Genesys User Guide Release 23-03**
Release Date:	11/10/2023
Effective Date:	11/10/2023

EFFECTIVE DATE		The following policy additions or changes are **effective 11/10/2023** unless otherwise noted. **Underlined text denotes new text. Text with a strike through it denotes deleted text.**
POLICY UPDATES		
1	**Introduction to Genesys**	Updated section overview and added a video instructions link
3.3	**Monitor View Tab**	Updated the fields displayed in the monitor view tab.
7.1	**Call Supervision**	Added new section to table of contents
7.1.5	**Logging Off an Agent**	New Section
7.2.2.2	**Sorting Results and Listening to Calls**	Clarified text and updated screenshot.
8.1	**Managing User Accounts**	Added new sections and video instructions links to table of contents
8.1.2	**Setting a Skill for an Agent**	Added a link for performing a quick search for an agent and clarified text
8.1.3	**Add a Skill for an Agent**	Added a link for performing a quick search for an agent and updated text
8.1.6	**Adding or Removing a Supervisor from a Static Agent Group**	New Section
8.1.6.1	**Adding a Supervisor to a Static Agent Group**	New Section
8.1.6.2	**Removing a Supervisor from a Static Agent Group**	New Section
8.1.7	**Quick Agent Search in Platform Administration**	New Section
8.1.8	**Editing General Agent Information**	New Section
9.2	**Historical Reporting**	Added new sections to table of contents
9.2.5.4	**Queue Voicemail Counts**	New Section
11.3	**Recording Search Troubleshooting**	Added a video instructions link

1 Introduction to Genesys

(Video instructions available: Introduction to Genesys)

Genesys is the cloud-based call management system used by IM workers to receive, make, and transfer calls, and listen to voicemail. Genesys is an online platform that does not require users to download anything to their computers. This guide explains the Agent Desktop, Designer, Interaction Recording, Platform Administration, and Reporting tiles in the application that enable call center functions.

The Genesys User Guide is organized by sections:

- Sections 1 through 6: Overview of general agent capabilities that any user can do
- Section 7: Overview of supervisor capabilities
- Section 8: Overview of segment administrator capabilities
- Section 9: Overview of reporting (coming soon)
- Section 10: Overview of local passwords
- Section 11: Troubleshooting solutions for Genesys

3.3 Monitor View Tab

The Monitor View tab is not visible to all agents. The Monitor View tab houses the ~~dashboard~~Dashboard tab, which shows contact center statistics in real time and the queues of the agent's specific group. The Dashboard tab is not visible to all agents. Focus on the queues ending in "use." This page is informational only.

Show/Hide an example of the page

The specific statistics ~~showcased~~displayed may vary by agency but include:

- Oldest Call Waiting: How long the oldest call currently in the queue has been waiting.
- Average Wait Time (AWT): Average wait time
- ~~Current # of~~ (for the day) for all calls ~~in the queue~~
- ~~Current maximum call waiting time~~
- ~~Total abandoned calls~~
- ~~Total~~ answered ~~calls~~and abandoned.

    Note   AWT is not the same as Average Speed of Answer (ASA). ASA is only answered calls. ASA is not visible in this view.

- Calls In Queue: Current ~~target state~~
- ~~Internal calls~~
- ~~Outbound~~number of calls in the queue waiting for agents.

- ~~Inbound calls~~

7.1 Call Supervision

There are three different methods to listen to live calls in Genesys:

Method	Definition
Monitoring	Neither the agent nor the caller can hear the supervisor
Barging	Both the caller and the agent can hear the supervisor
Coaching	Only the agent can hear the supervisor

The Monitor Tab has information relating to call supervision. It is separated into two tabs:

Tab	Function
Dashboard	• Includes real-time statistics such as the average wait time and how many calls are currently in queue • Allows supervisor to monitor the number of agents in queue
My Agents	• Displays the agents assigned to the supervisor and their current status

It is recommended supervisors use the Real-Time Reporting or "Pulse" application to monitor queues and agents. The Real-Time Reporting application can be customized by a supervisor to display all desired statistics, whereas the agent desktop cannot.

7.1.5 Logging an Agent Off

(Video instructions available: Logging an Agent Off)

The log off agent feature is useful if it's discovered an agent has forgotten to log off.

The Supervisor must be logged on to Workspace and is assigned as a Supervisor for the specific agent or agent group.

To log an agent off:

1. From the Agent Desktop click the Monitor view tab.
2. Click My Agents tab.
3. Click the three dots next to the name of the agent to be logged off.
4. Select **Log Off** from the drop down.

5. If the agent is not showing, use the features at the bottom of the page to change the display.
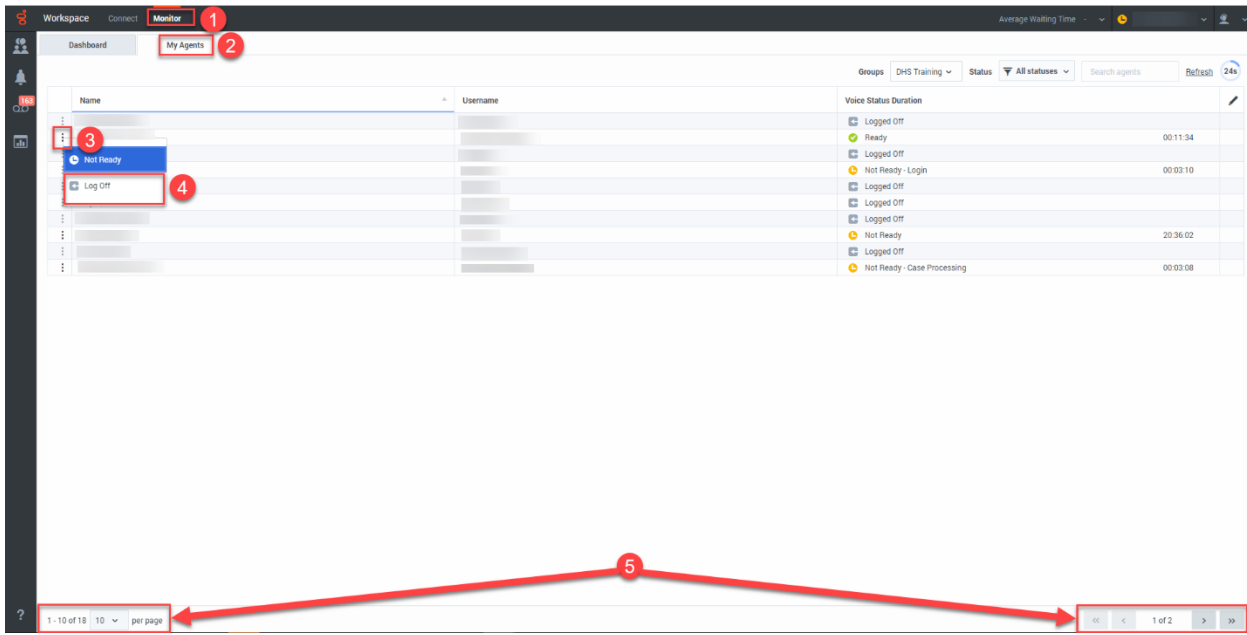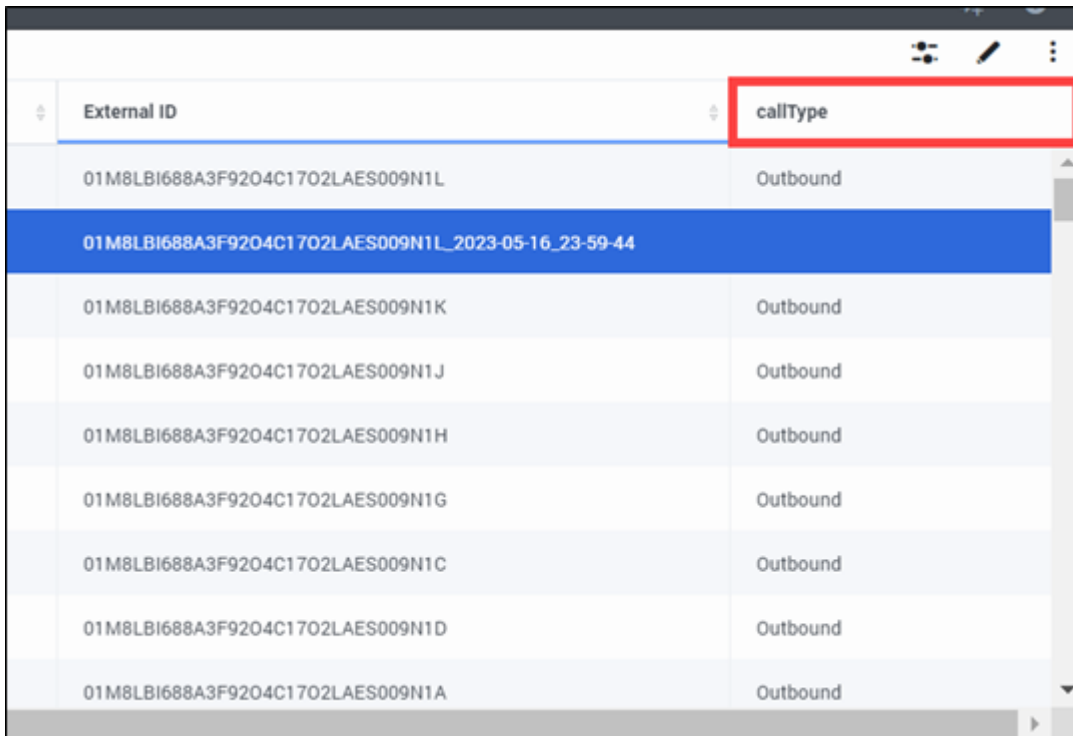
7.2.2.2 Sorting Results and Listening to Calls

(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
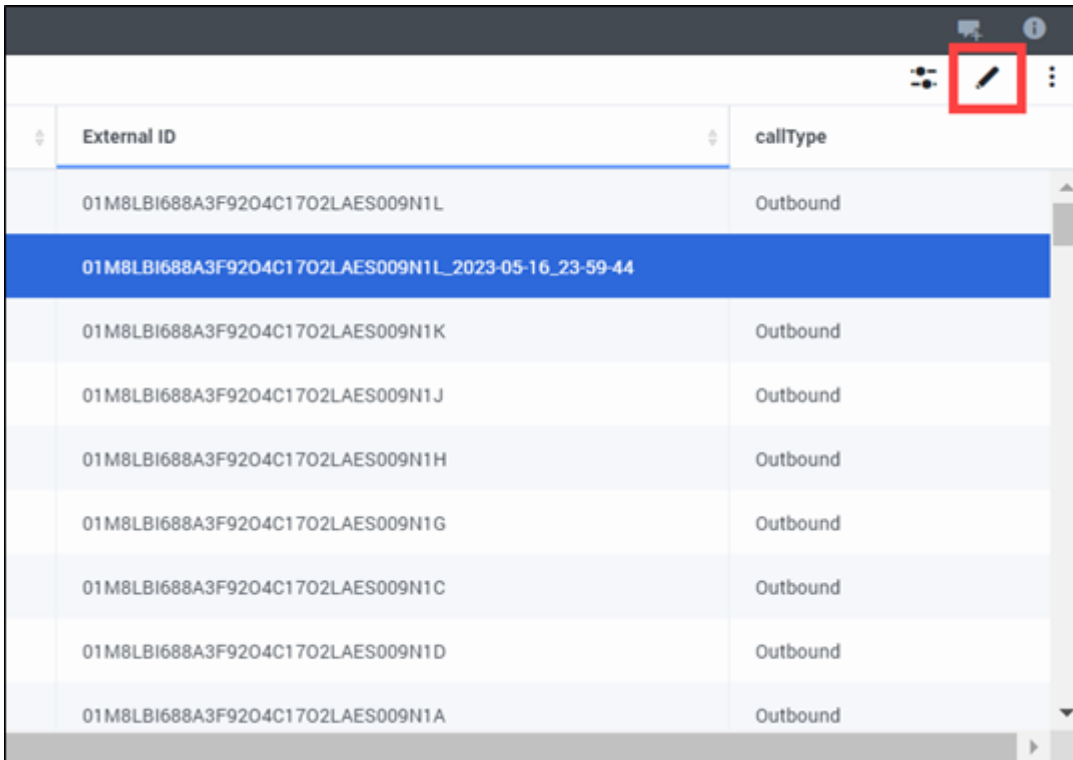
The search results columns can be adjusted as needed. For example, if searching by inbound calls, you can add the callType column to the search results.
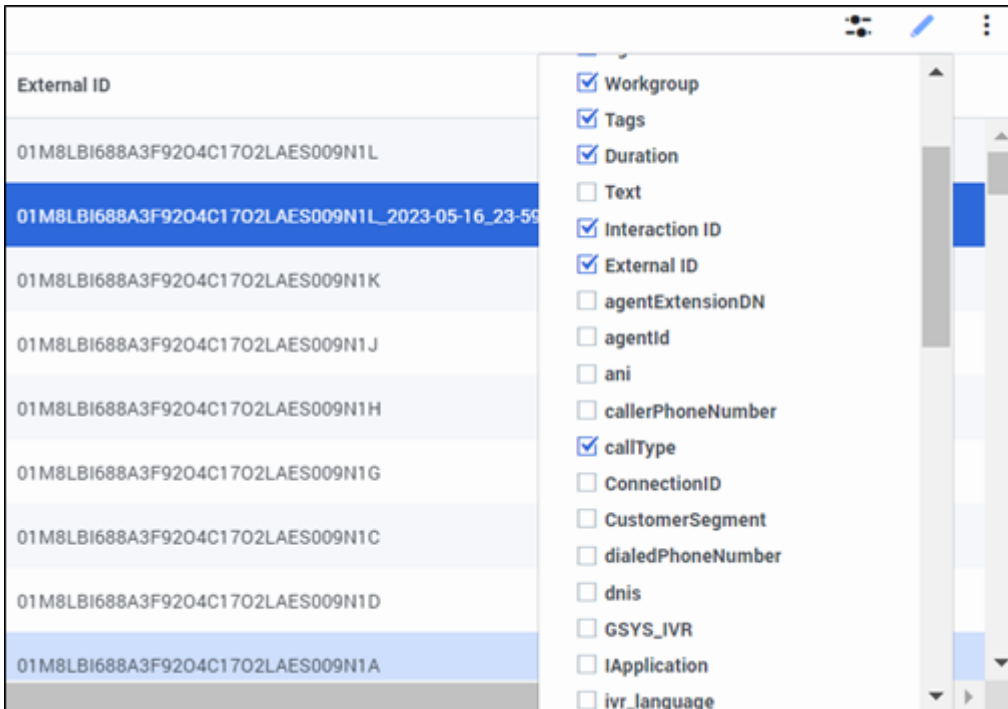
	External ID	callType
	01M8LBI688A3F92O4C17O2LAES009N1L	Outbound
	01M8LBI688A3F92O4C17O2LAES009N1L_2023-05-16_23-59-44	
	01M8LBI688A3F92O4C17O2LAES009N1K	Outbound
	01M8LBI688A3F92O4C17O2LAES009N1J	Outbound
	01M8LBI688A3F92O4C17O2LAES009N1H	Outbound
	01M8LBI688A3F92O4C17O2LAES009N1G	Outbound
	01M8LBI688A3F92O4C17O2LAES009N1C	Outbound
	01M8LBI688A3F92O4C17O2LAES009N1D	Outbound
	01M8LBI688A3F92O4C17O2LAES009N1A	Outbound

To adjust the search results columns, ~~select~~click 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.

SelectClick 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~~adjust the search criteria, ~~select~~click the Search Filters slide icon that looks like sliders.

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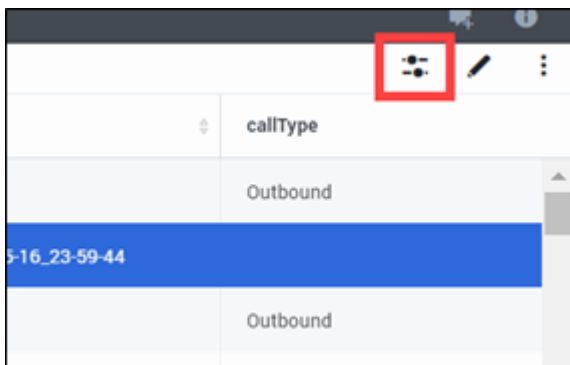
Listening to Calls

To listen to a call, ~~use~~click 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.

#			Date / Time	Media
1	☐	—	05/16/23 06:59 PM	📞
▶		🗗	**05/16/23 06:59 PM**	📞
2	☐	+	05/16/23 06:59 PM	📞
3	☐	+	05/16/23 06:58 PM	📞
4	☐	+	05/16/23 06:58 PM	📞

Interactions (1,000 of 11,818) ⌄   Filters: Date Range

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8.1 Managing User Accounts

8.1.1 Logging in to Manage User Accounts (Video instructions available: Logging in to Manage User Accounts)

8.1.2 Setting a Skill for an Agent (Video instructions available: Setting a Skill for an Agent)

8.1.3 Adding a Skill for an Agent (Video instructions available: Adding a Skill for an Agent)

8.1.4 Adding a Skill for Multiple Agents (Video instructions available: Adding a Skill for Multiple Agents)

8.1.5 Adding an Agent to an Agent Group (Video instructions available: Adding an Agent to an Agent Group)

8.1.6 Adding or Removing a Supervisor from a Static Agent Group

- 8.1.6.1 Adding a Supervisor to a Static Agent Group (Video instructions available: Adding a Supervisor to a Static Agent Group)

- 8.1.6.2 Removing a Supervisor from a Static Agent Group (Video instructions available: Removing a Supervisor from a Static Agent Group)

8.1.7 Quick Agent Search in Platform Administration (Video instructions available: Quick Agent Search in Platform Administration)

8.1.8 Editing General Agent Information (Video instructions available: Editing General Agent Information)

This section includes instructions for how to assign skills to an agent and adding agents to agent groups.

8.1.2 Setting a Skill for an Agent

(Video instructions available: Setting a Skill for an Agent)

Skills are assigned to workers to identify queue assignment in different areas such as multilingual or an agent with experience in other programs. Skills have a numeric value of 0 or 10 to the agent for that skill. 0 means they are not assigned to the queue associated to the skill, 10 means they are assigned to the queue. For example, an agent can be added to the Spanish queue by assigning a value of 10 to the Spanish skill.

Note: ~~At this time, agents~~Agents are either skilled at 0 or 10.

To assign a skill to ~~a worker~~an agent:

1. Select the Persons link under the accounts section on the Configuration Manager page.

Note   To conduct a quick search for an agent, see SECTION 8.1.7 QUICK AGENT SEARCH IN PLATFORM ADMINISTRATION, then proceed with step number five.
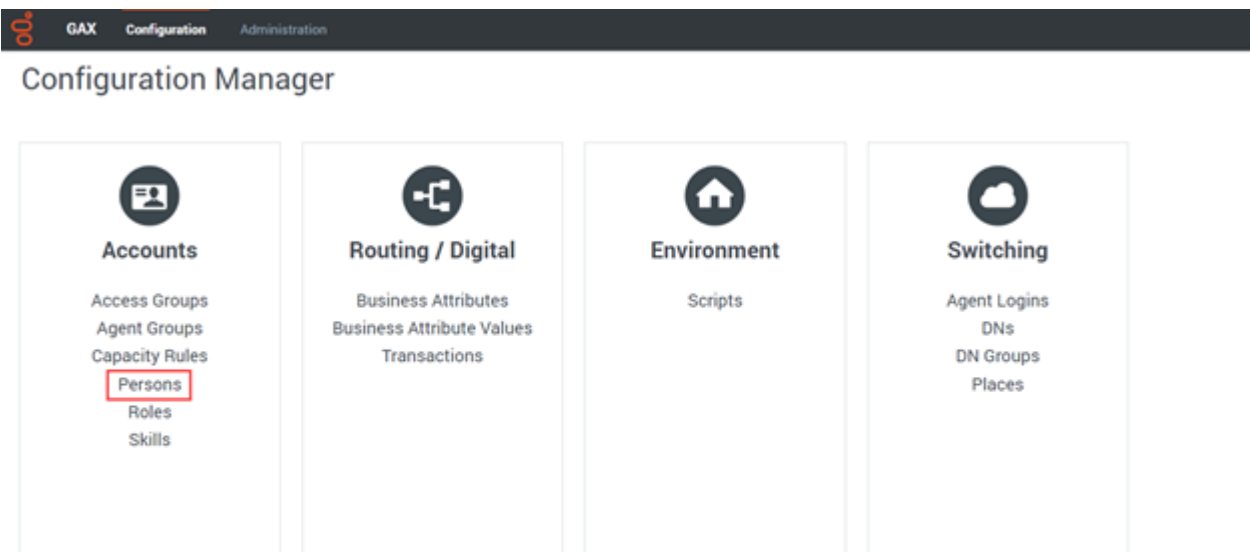
2. Select the OpsStageIU folder.
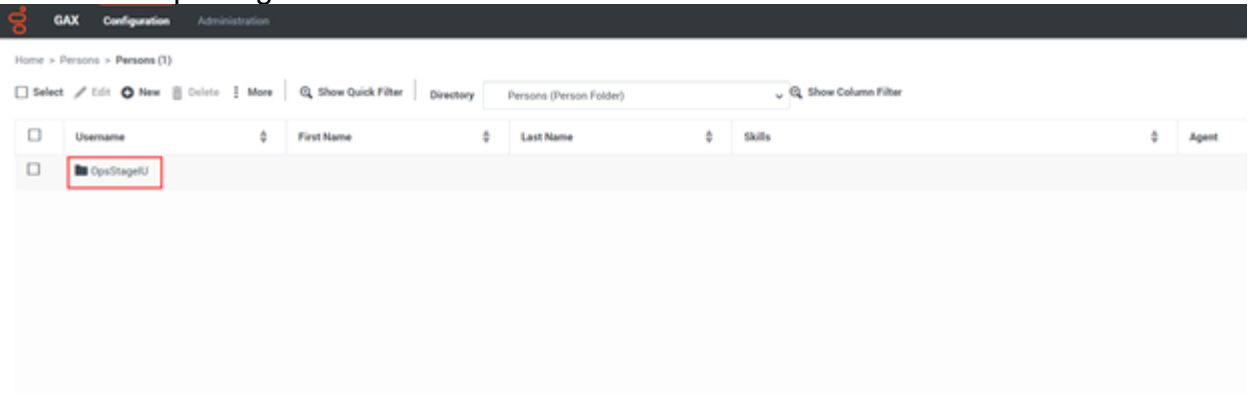
3. Select the DHS folder.
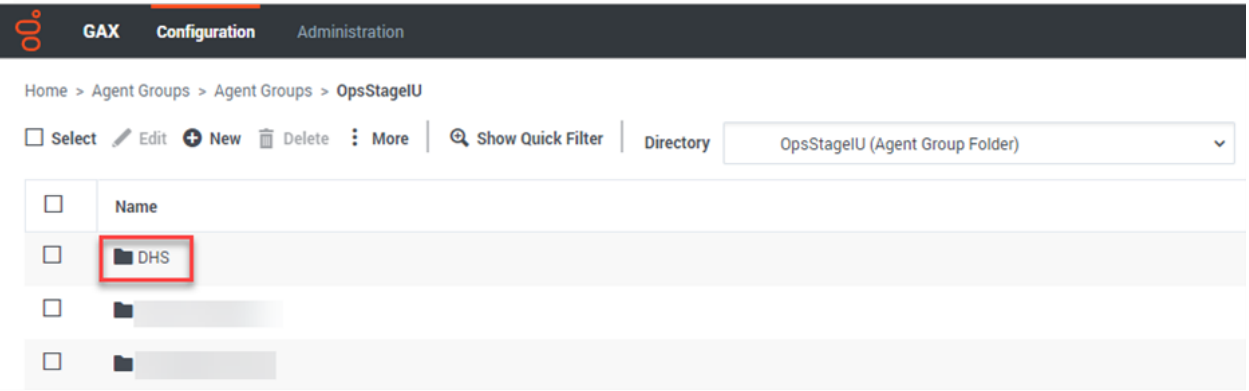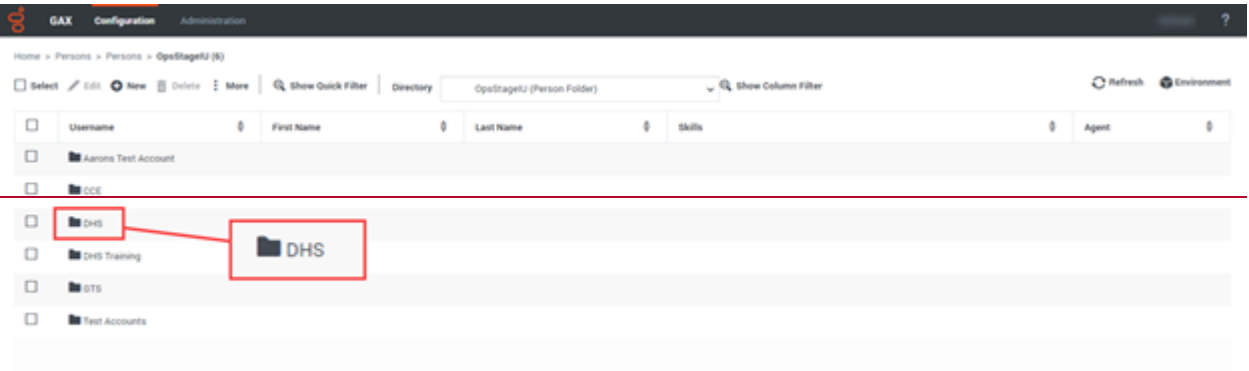
4. Select the DMS folder or the consortium folder the agent is in (Capital, Northern, Milwaukee, etc~~.)~~.), and then select their name to open their profile.

   Note: All other lines of business not related to Income Maintenance are in the DMS folder.
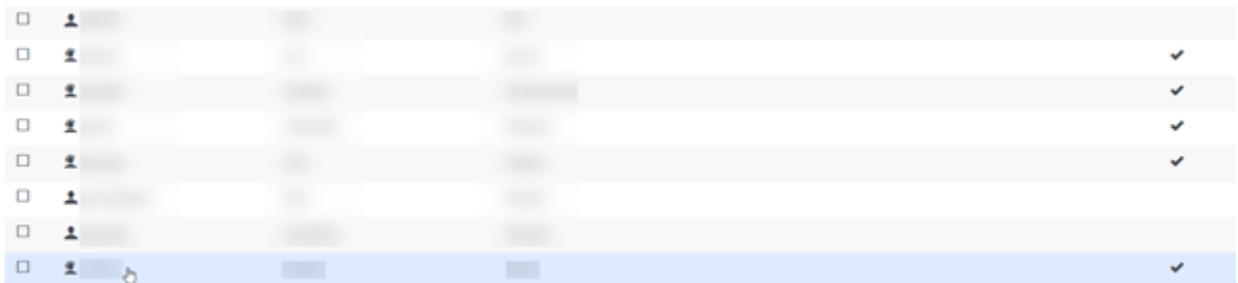
5. Select~~-~~ **Skills** on the left-hand list. ~~One~~Once selected, there is a list of the agent's skills.

   Note: If you don't see the skill you're looking for, see SECTION 8.1.3 ADDING A

GAX   **Configuration**   Administration

Home > Persons > Persons > OpsStageIU > DHS Training >   Properties

General

Member Of

Ranks

Skills

Agent Logins

Options

Permissions

Dependencies

Accessible Objects

Skills

☐	Skill	⬍	Level
☐			10
☐			10
☐			10

6. Select the skill from the list and enter "**10**" in the Level field (0=not added to the queue, 10=added to the queue).
7. ~~Select~~ Click **OK**.

No items

New   ✕

Skill *

[📁]

Level

[10   ]

Cancel   **OK**

8. ~~Select~~ Click **Apply**.
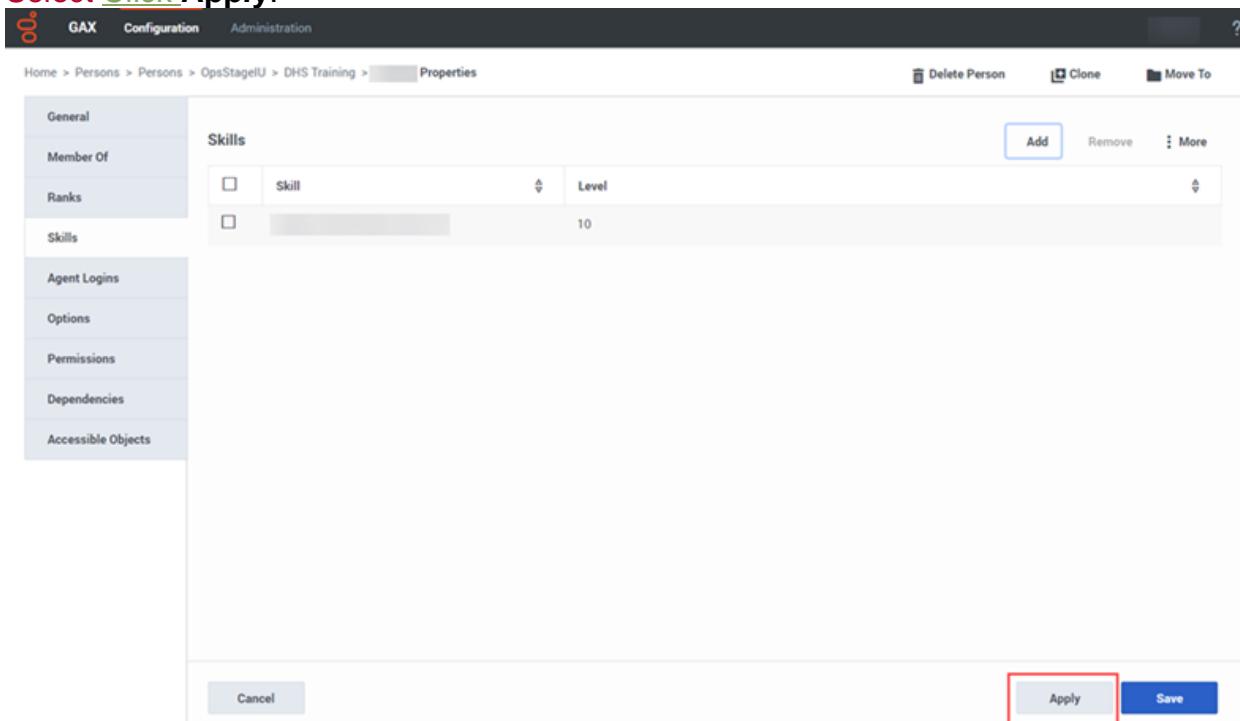
Note: Remove a skill from the agent by selecting the skill and then ~~selecting~~ clicking **Remove**.

8.1.3 Adding a Skill for an Agent

(Video instructions available: [Adding a Skill for an Agent](#))

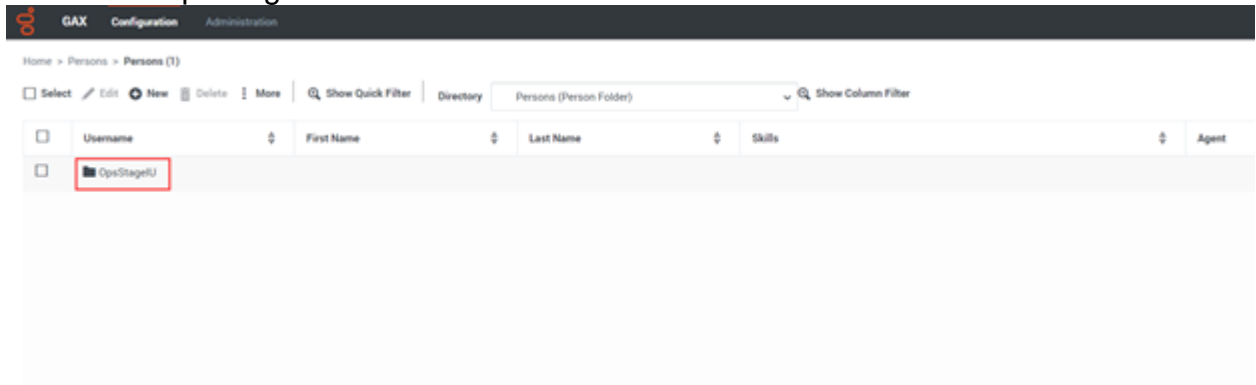Add a skill for an agent if the skill is missing from the agent's profile.

To add a skill for an agent:

1. Select the Persons link under the accounts section on the Configuration Manager page.
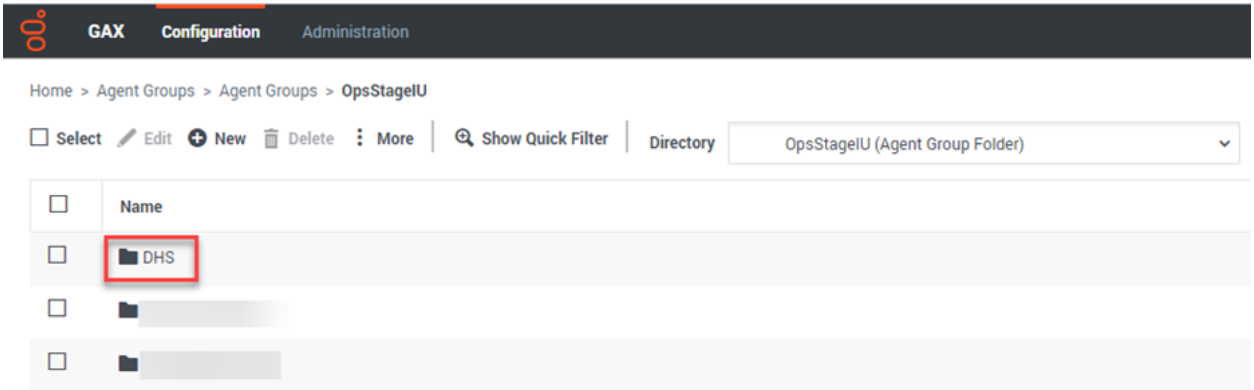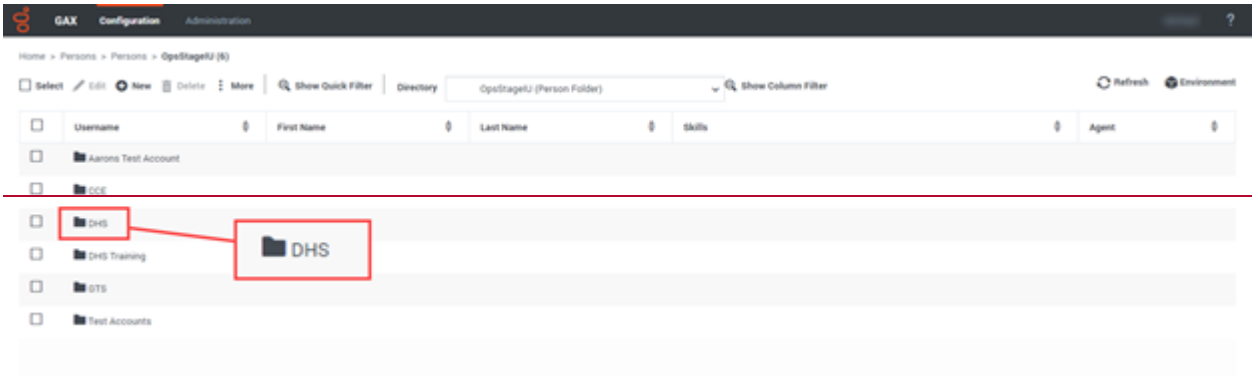
    Note   To conduct a quick search for an agent, see SECTION 8.1.7 QUICK AGENT SEARCH IN PLATFORM ADMINISTRATION, then proceed with step number five.
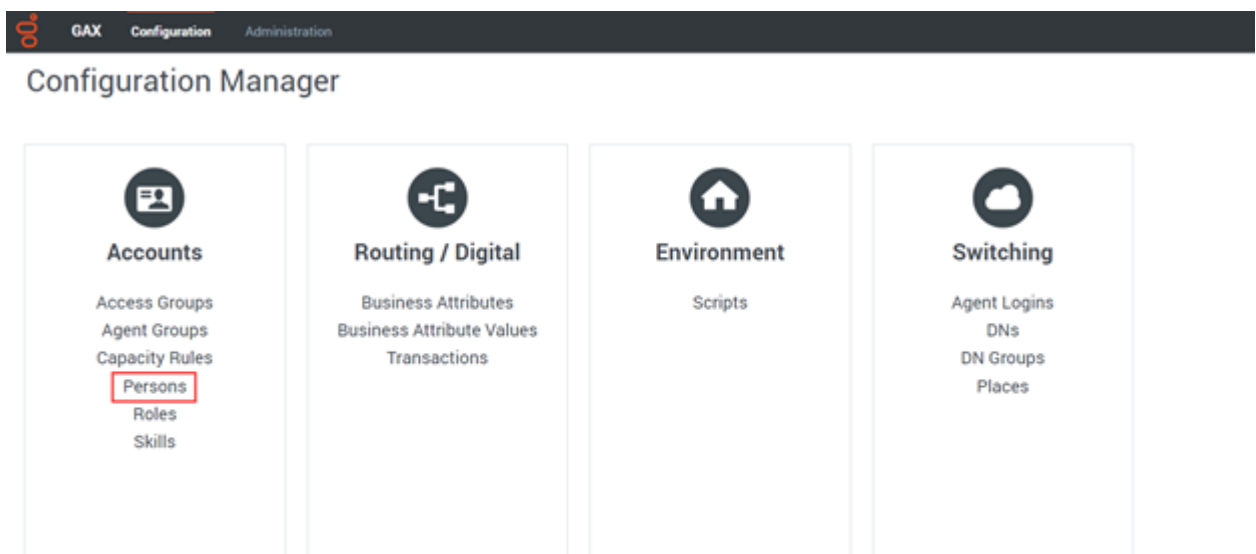
2. Select the OpsStageIU folder.

3. Select the DHS folder.

4. Select the DMS folder or the consortium folder the agent is in (Capital, Northern, Milwaukee, etc.) and then select their name to open their profile.
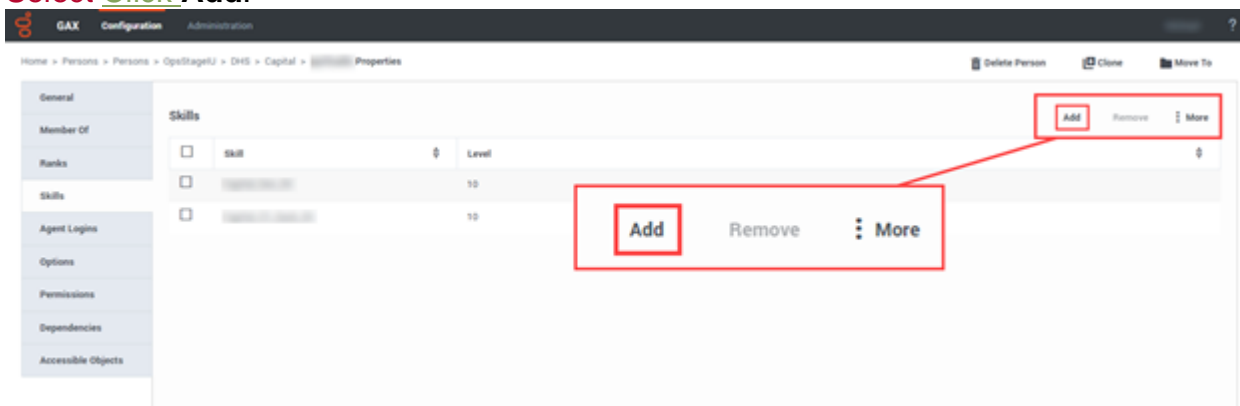
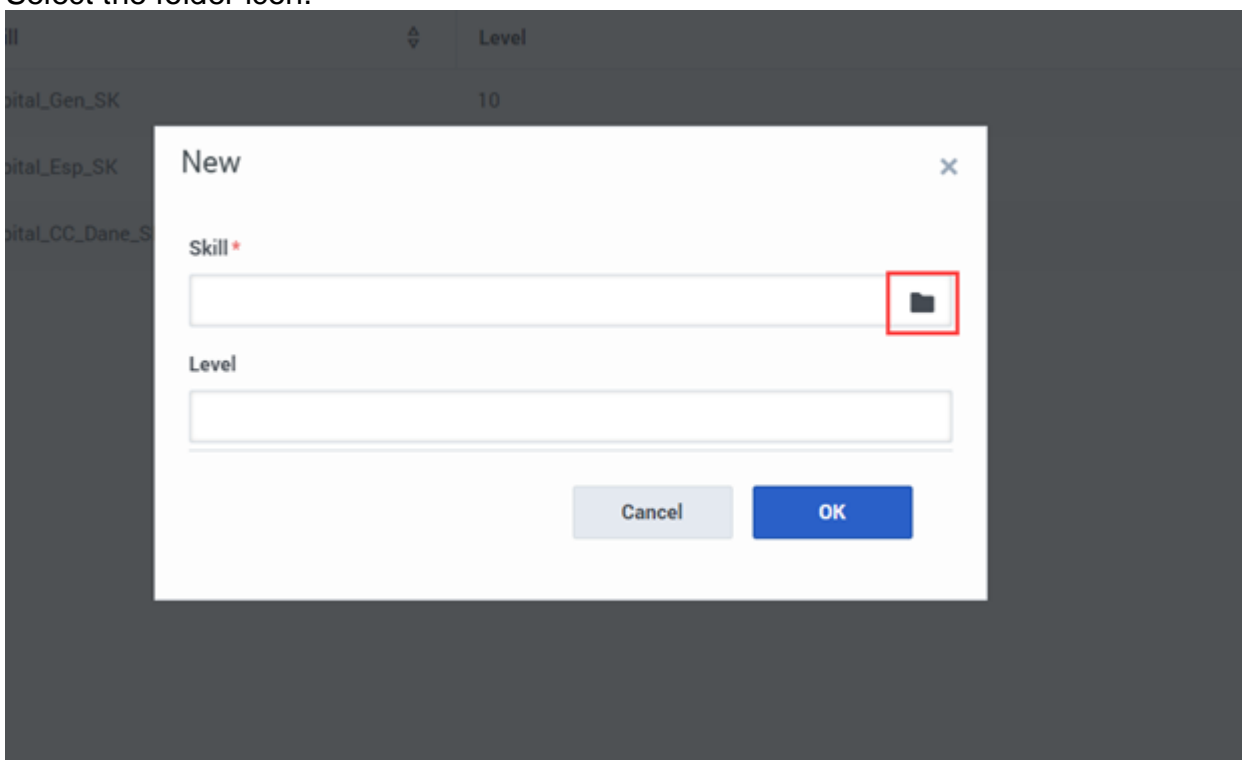Note: All other lines of business not related to Income Maintenance are in the DMS folder.
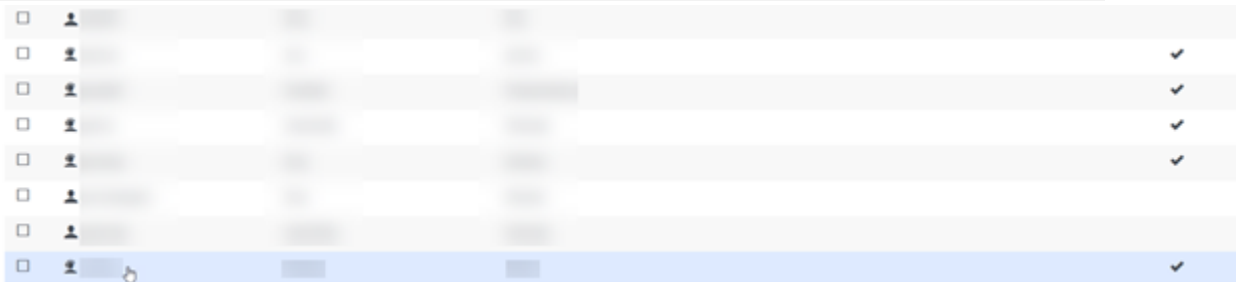
5. Select **Skills** on the left-hand list. Once selected, there is a list of the agent's skills.
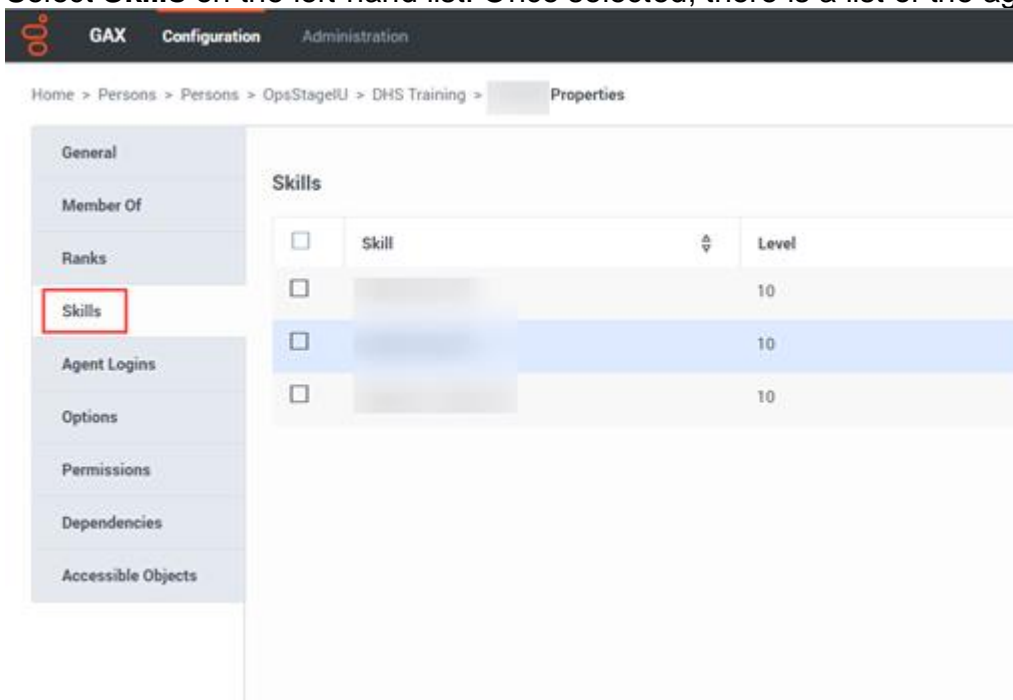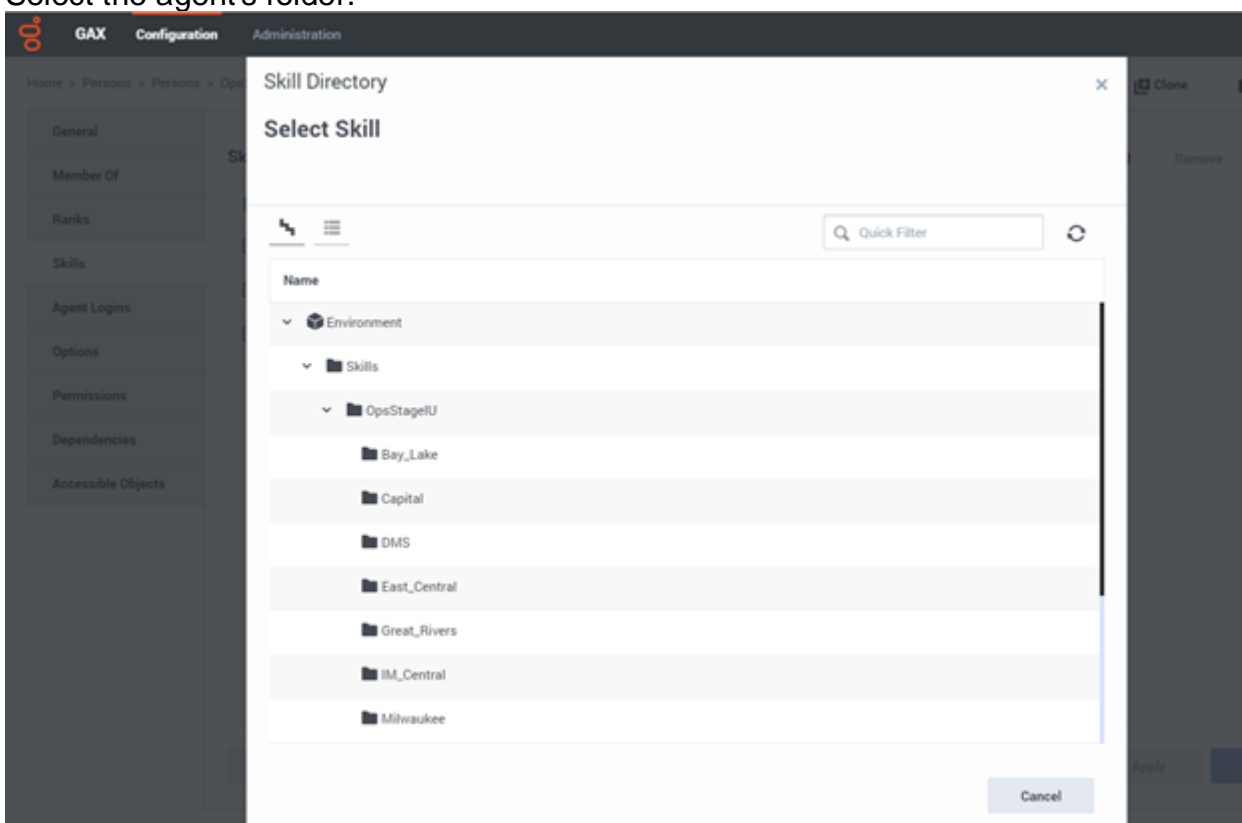

6. Select Click **Add**.

7. Select the folder icon.

8. Select the agent's folder.

9. Select the skill from the list and enter "**10**" in the Level field (0=not added to the queue, 10=added to the queue).

10. ~~Select~~ Click **OK**.

11. ~~Select~~ Click **Apply**.

Note: ~~remove~~Remove a skill from the agent by selecting the skill and then ~~selecting~~clicking **Remove**.

# 8.1.6 Adding or Removing a Supervisor from a Static Agent Group

Adding a user as a supervisor in a static agent group allows the individual to monitor or listen to calls for any agent in that agent group.
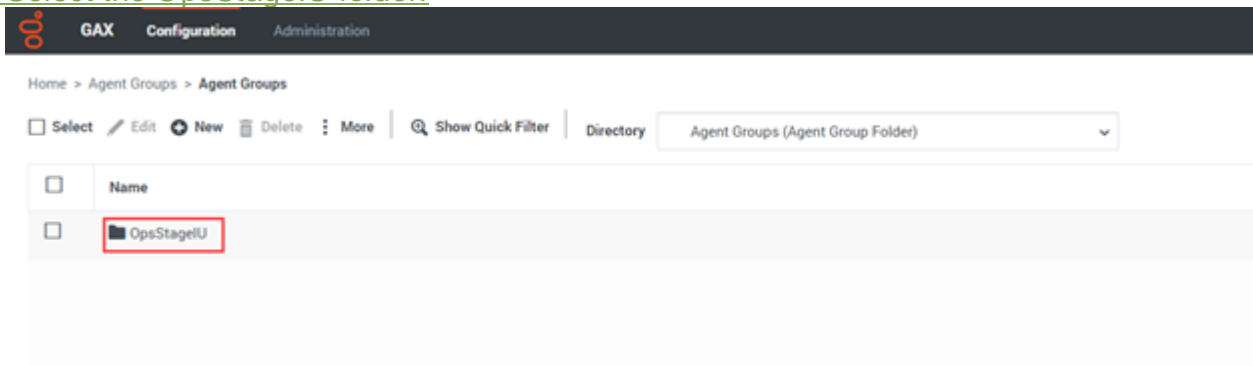
8.1.6.1 Adding a Supervisor to a Static Agent Group

- 8.1.6.1 Adding a Supervisor to a Static Agent Group (Video instructions available: Adding a Supervisor to a Static Agent Group)

To add a supervisor to a static agent group:

1. Select the Agent Groups link on the Configuration Manager page.
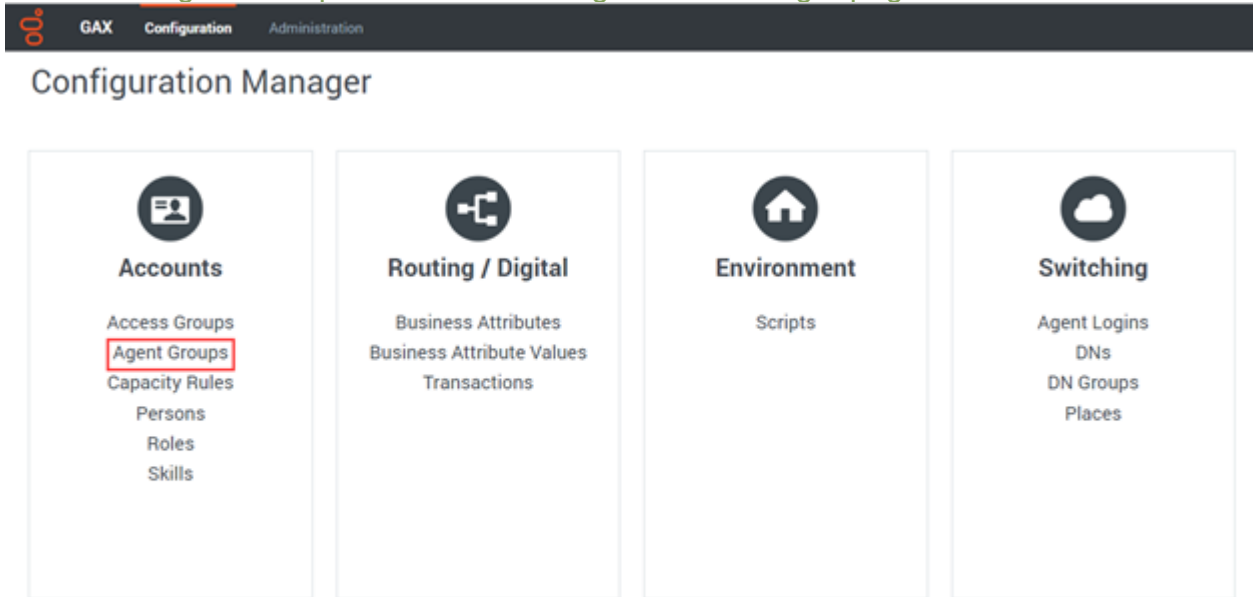
2. Select the OpsStageIU folder.

3. Select the DHS folder.

4. Select the Consortium/Line of Business (LOB) folder.

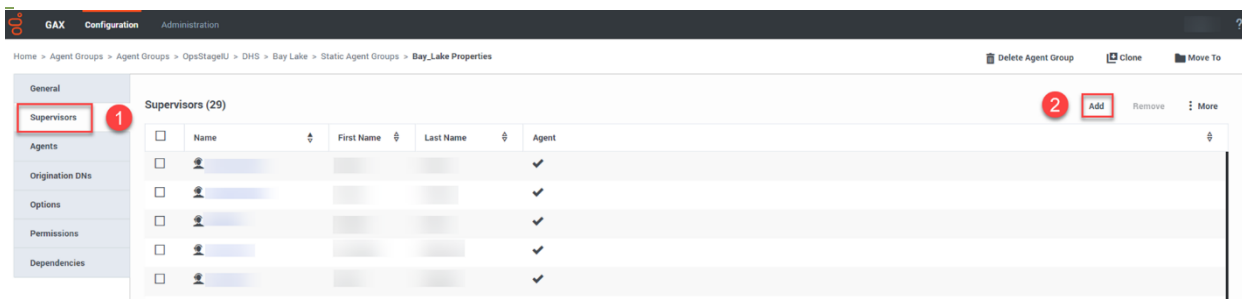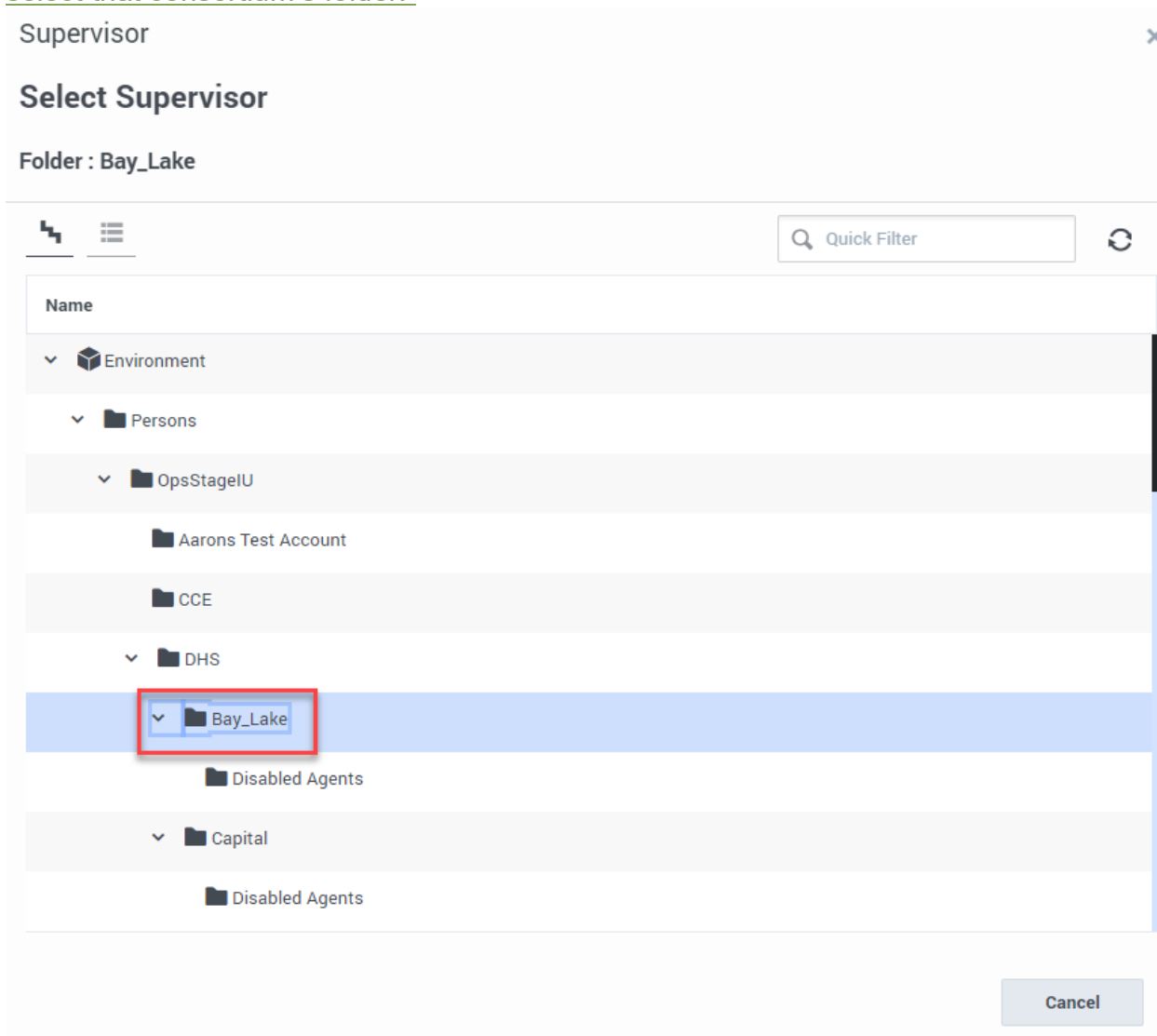5. Select the Static Agent Groups folder.
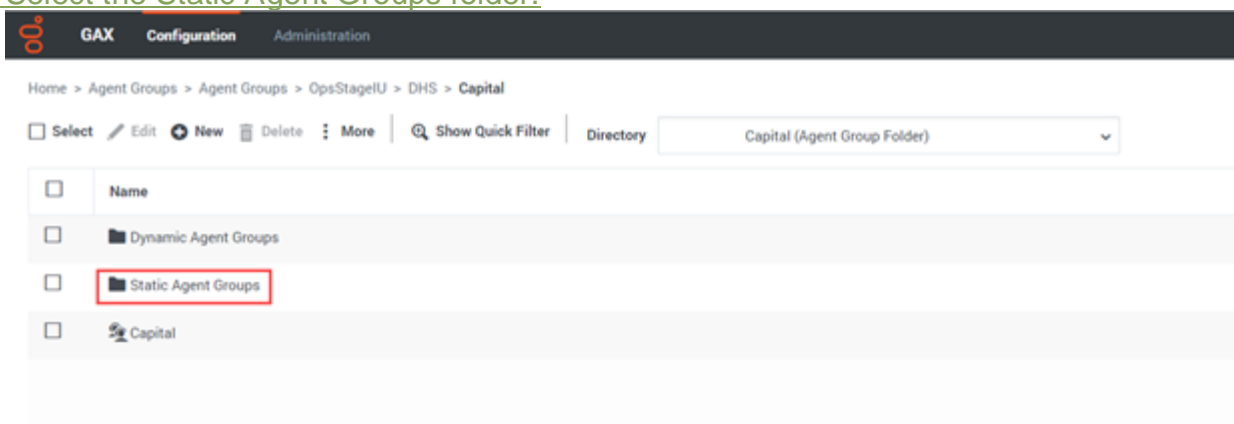
6. Select the umbrella group. The umbrella agent group should include all agents in the consortium or other Line of Business (LOB).
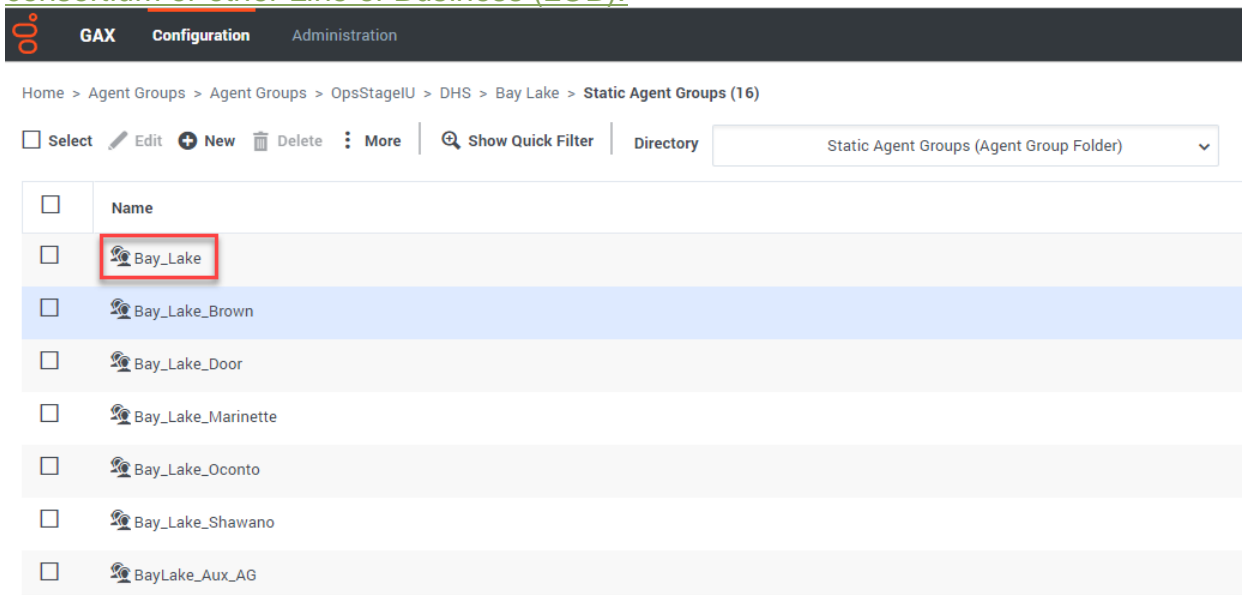
7. Select the Supervisors tab on the left, and then click **Add** on the right.

8. Scroll through the list to find the consortium you want to add the supervisor to, and select that consortium's folder.

Supervisor   ✕

Select Supervisor

Folder : Bay_Lake

Name
∨ 📦 Environment
∨ 📁 Persons
∨ 📁 OpsStageIU
📁 Aarons Test Account
📁 CCE
∨ 📁 DHS
∨ 📁 Bay_Lake
📁 Disabled Agents
∨ 📁 Capital
📁 Disabled Agents

Quick Filter

Cancel

9. Select the agent to be made a supervisor.

Supervisor ✕

Select Supervisor

Folder : Bay_Lake

Name		First Name	Last Name		Agent	
👤					✔	
👤					✔	
👤					✔	
👤					✔	
👤					✔	
👤					✔	
👤					✔	
👤					✔	
👤					✔	
👤					✔	

Cancel

10. Notice the number of supervisors increased by one. Click **Apply** to save the changes.

8.1.6.2 Removing a Supervisor from a Static Agent Group

- 8.1.6.2 Removing a Supervisor from a Static Agent Group (Video instructions available: Removing a Supervisor from a Static Agent Group)

To remove a supervisor from a static agent group:
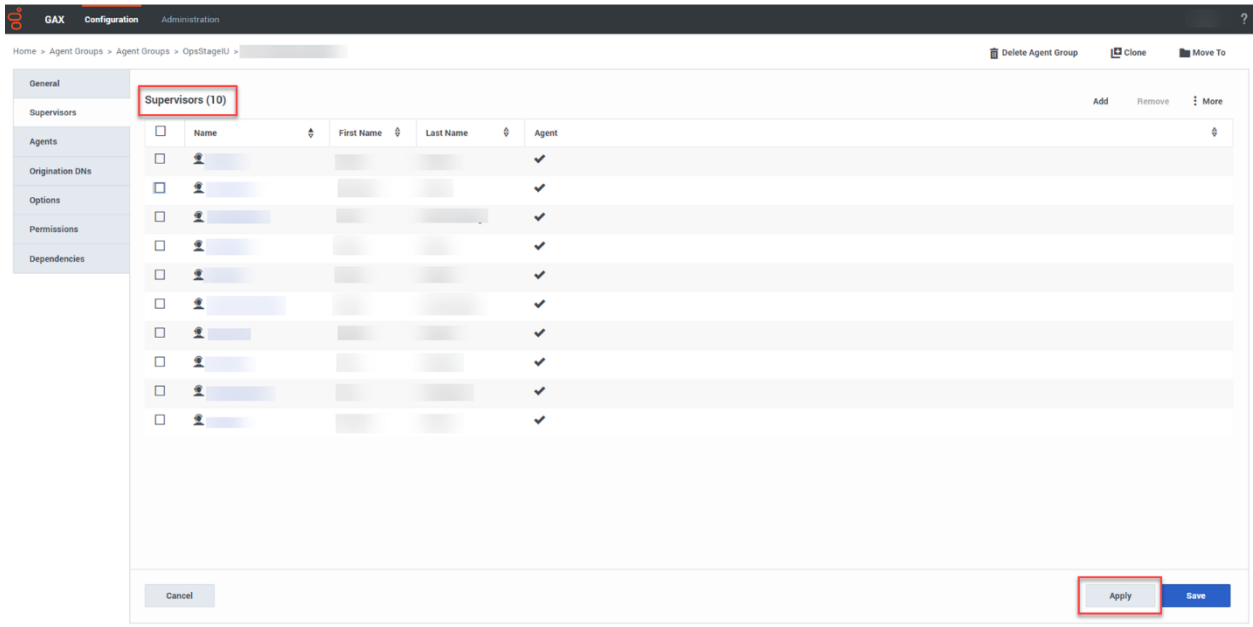
1. Follow instructions one through six found in SECTION 8.1.6.1 ADDING A SUPERVISOR TO A STATIC AGENT GROUP.
2. From the Supervisors tab, check the checkbox next to the name of the Supervisor to be removed, and click **Remove**.
   Note   Be sure to select the appropriate agent group.
3.
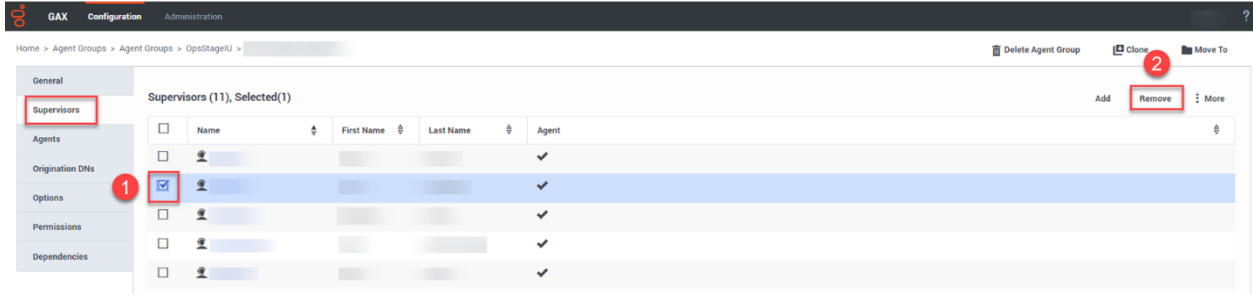
4. Notice the number of Supervisors decreased by one. Click **Apply** to save the changes.
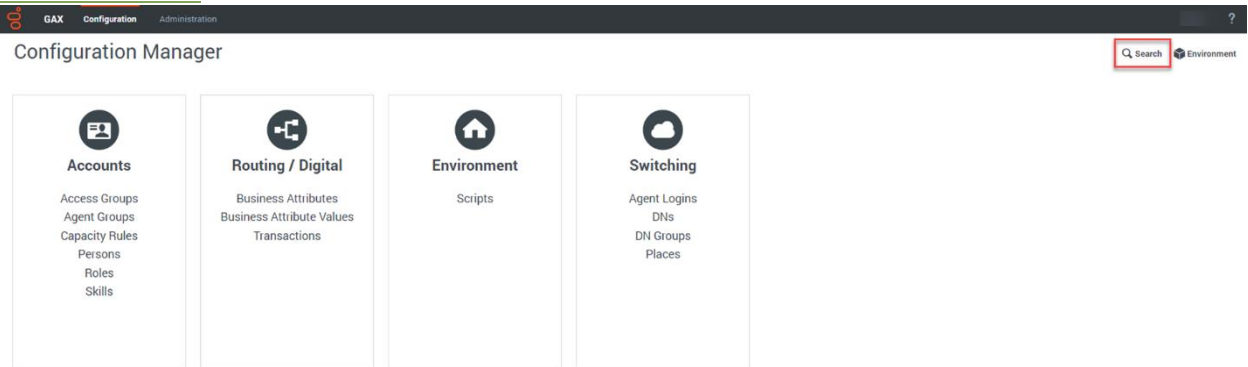
8.1.7 Quick Agent Search in Platform Administration

8.1.7 Quick Agent Search in Platform Administration (Video instructions available: Quick Agent Search in Platform Administration)

Searching for an agent can be done different ways. Below is the quickest way to search for an agent.

To search for an agent from the Configuration Manager home page:

1. Click **Search**.

2. Enter the agent's Genesys username in the Name/Number field and select **Person** from the Type drop-down menu. Click **Search**.
   If the agent's Genesys username is unknown, click **Advanced Search** to expand the search options.
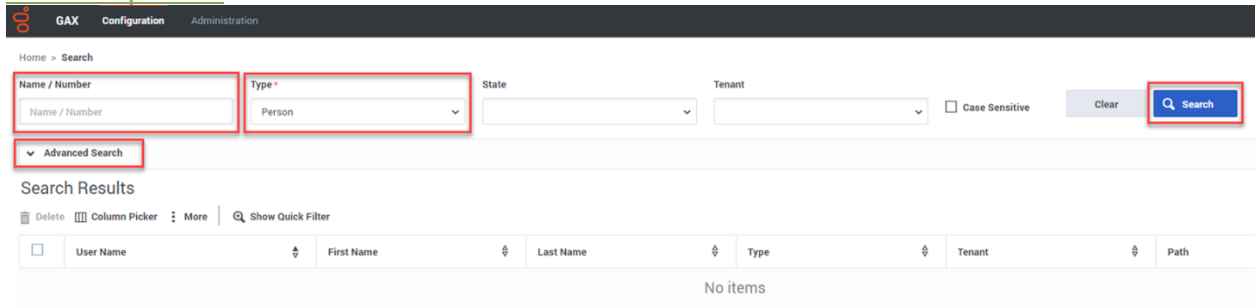
3. Using the Advanced Search options, search for the agent by their First Name, Last Name or both. "Person" must be selected from the "Type" drop-down menu. Then click

the **Search.**

Note   Spelling of the Genesys username, first name and last name must be exact for search results to work properly.

8.1.8 Editing General Agent Information

8.1.8 Editing General Agent Information (Video instructions available: Editing General Agent Information)
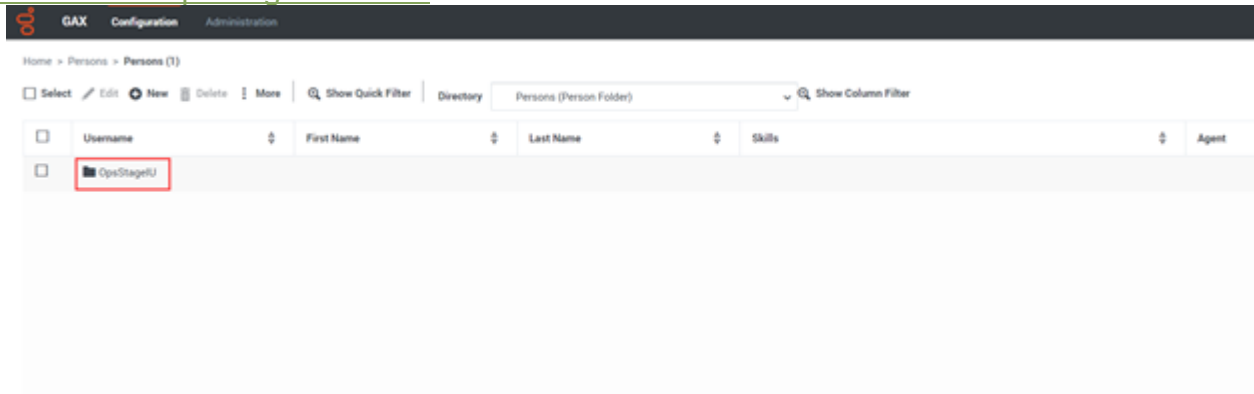
To change an agent's username, first name, last name, email address, password and external ID follow the steps below:

1. Select the Persons link on the Configuration Manager home page.

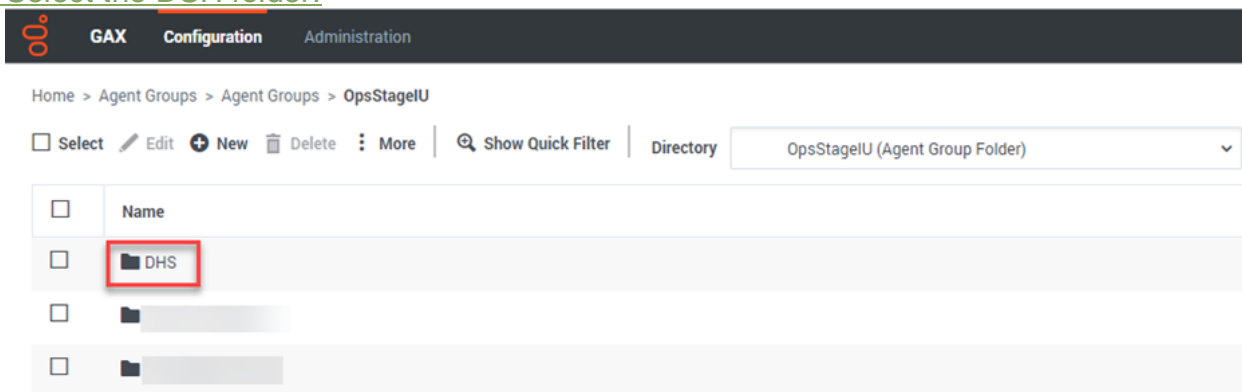   Note   To conduct a quick search of an agent, see
   SECTION 8.1.7 QUICK AGENT SEARCH IN PLATFORM ADMINISTRATION

   , then proceed with step number five.
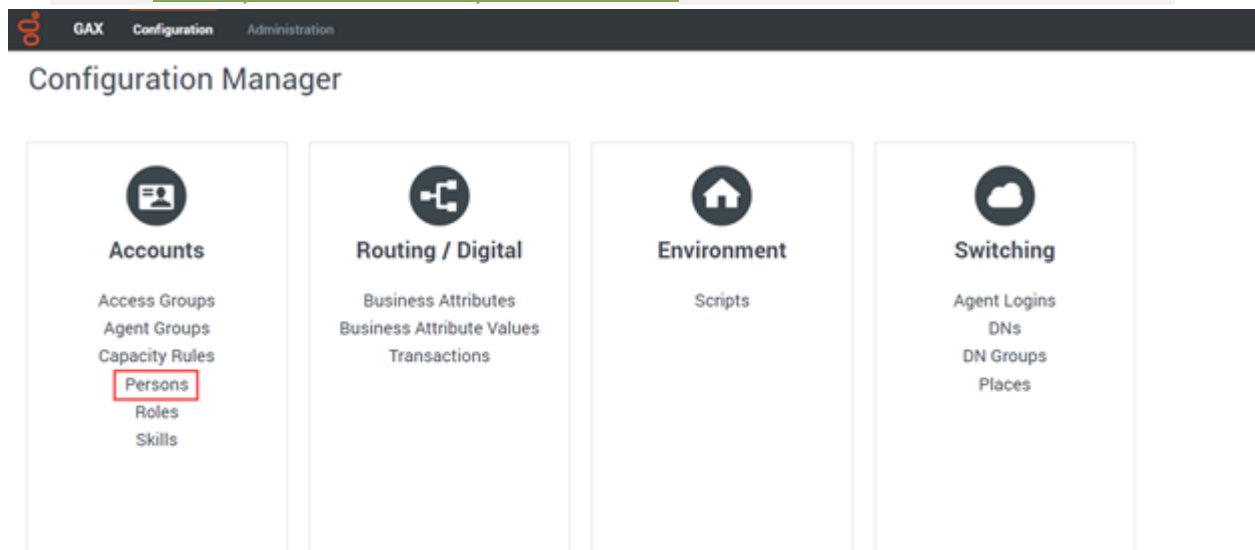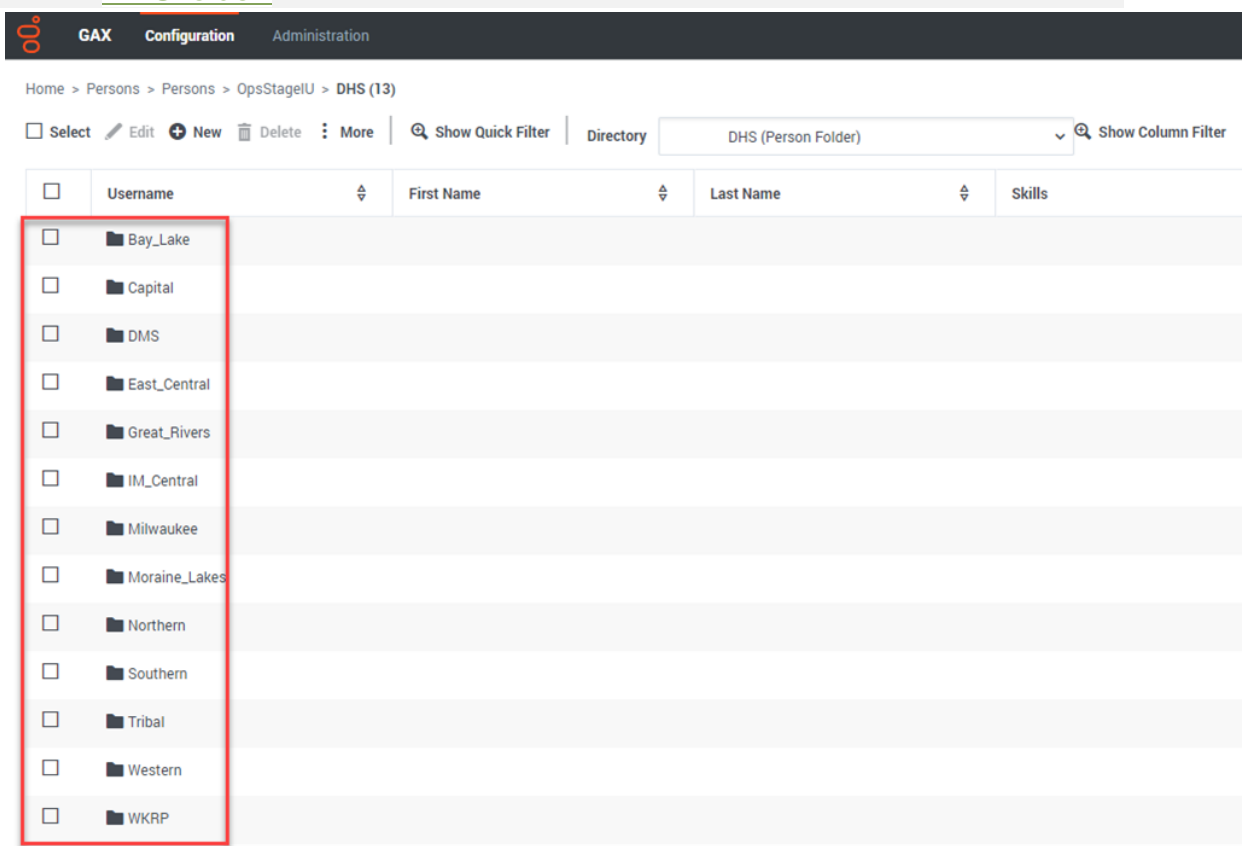

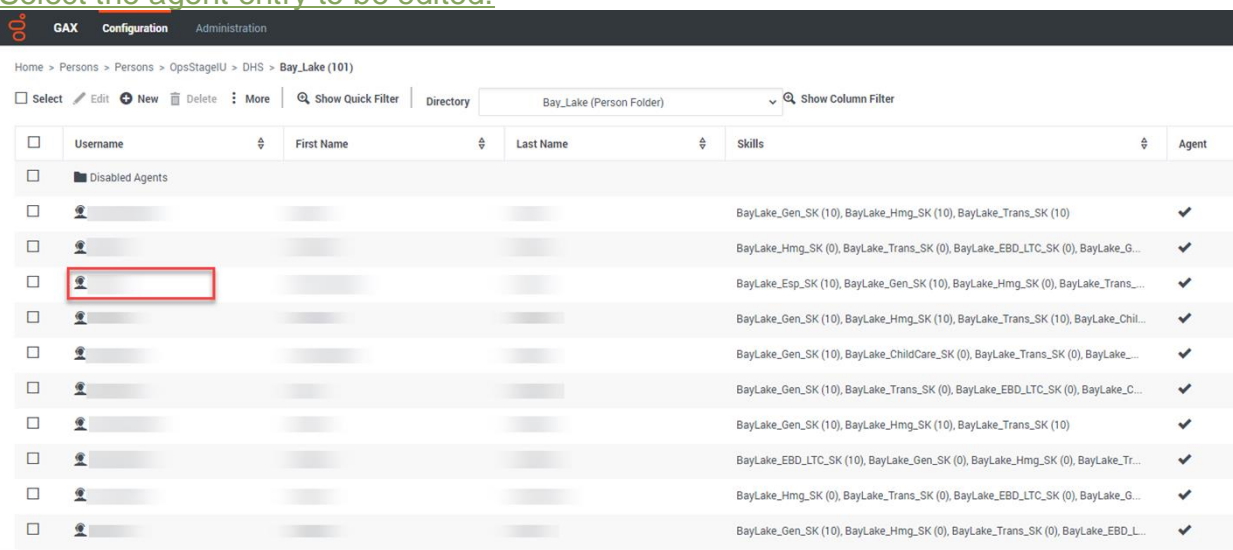2. Select the OpsStageIU folder.

3. Select the DSH folder.

4. Select the DMS folder or the consortium folder the agent is in (Capital, Northern, Milwaukee, etc.).

   Note   All other lines of business not related to Income Maintenance are in the DMS folder.

5. Select the agent entry to be edited.

6. From the General tab, edits can be made only to the following fields:
    o Username
    o First Name and Last Name
    o Email Address
    o Password and Confirm Password
    o External ID

The Username is the local username and is case sensitive. The External ID is the agent's WAMS ID. The External ID and Local ID must always match. Before changing the External ID in Configuration Manager the agent first needs to go through the necessary steps to change their WAMS ID, see SECTION 2.3 FORGOTTEN CREDENTIALS.

Any changes made to the agent's password will reset their local password, not their WAMS password. Enter the password in both fields and check the checkbox, "Force Password Reset on Next Login." Provide the agent with the newly created temporary password and inform them the temporary password is only valid the first time they log in. The first time the agent logs in with the temporary password they will be forced to create a new password of their choice. See SECTION 10.1 SETTING A LOCAL PASSWORD for specific instructions on how to set a local password.

Note   Do not touch the Employee ID, this is assigned individually to each agent by the system when their profile is created. All other fields not mentioned above **must** be left untouched.

7. After making desired changes, click **Apply**.

9.2 Historical Reporting

9.2.1 Running Reports (Video instructions available: Running Reports)

9.2.2 Creating Subscriptions (Video instructions available: Creating Subscriptions)

- 9.2.2.1 Email Subscription

- 9.2.2.2 History List Subscription

9.2.3 Editing Subscriptions (Video instructions available: Editing Subscriptions)

9.2.4 Unsubscribing from Subscriptions (Video instructions available: Unsubscribing from Subscriptions)

9.2.5 Recommended Queue and Agent Reports

- 9.2.5.1 Agent Performance Report V2.0

- 9.2.5.2 Queue Statistics_Adjusted

- 9.2.5.3 Queue Statistics_Adjusted_CB

- 9.2.5.4 Queue Voicemail Counts

9.2.5.4 Queue Voicemail Counts

The Queue Voicemail Counts report displays a count of all calls sent to voicemail. It is not a count of the number of voicemail recordings.

This report can be found in Historical Reporting: Shared Reports > Custom > Queue Voicemail Counts

- Selections for this report require choosing a "pre-set date filter" and the "queue" from the Index section of the page.
- When choosing a queue make sure it has "vm" in the queue name.
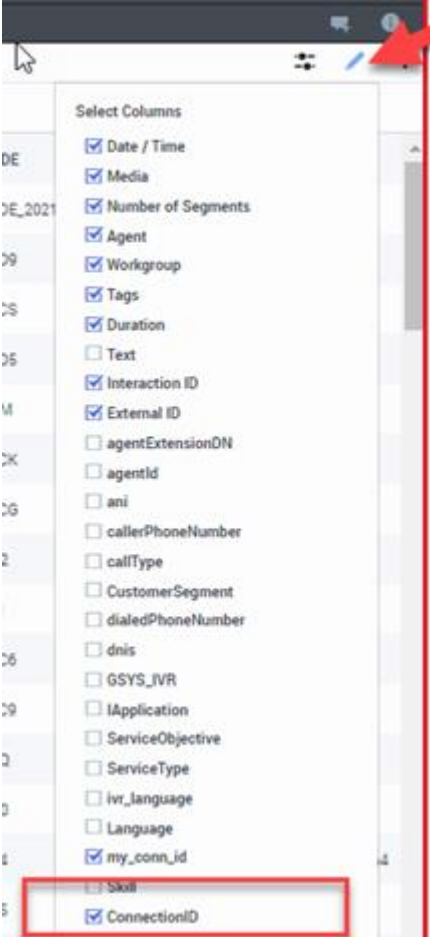- This report can be subscribed to or run daily.

Tenant	Media Type	Queue	Interaction Type	Day	Routed to VM
Environment	Voice	_fraud_vm_vq	Inbound	2023-09-06	123

Statistics Definitions

Statistic Name	Description	Format
Tenant	Defaults to Environment	Text
Media Type	Defaults to Voice	Text
Queue	Queue name	Text
Interaction Type	Inbound or Outbound	Text
Day	Date of statistics	yyyy-mm-dd
Routed to VM	Total calls that were sent to voicemail	Count

11.3 Recording Search Troubleshooting

(Video instructions available: Recording Search Troubleshooting)

Issue	Description	Resolution
No Connection ID in search results	Connection ID column doesn't appear.	• Add the Connection ID by clicking "Select Columns" icon
Unknown Connection ID	Don't have Connection ID to search	• Search by Agent and date
Missing Recording	Can't find recording in "Interaction Recording" search or the ECF.	• There is a delay while recordings are indexed of approximately 20 minutes. • If the telephonic signature is missing in the ECF, see Section 7.2.3 Telephonic Signature Recording Missing in the ECF.