

AUDIT REPORT TRACKING SYSTEM (ARTS)

SECTION I: SUMMARY INFORMATION			
Audit Title:	The Accuracy and Validity of 311 Data Could Be Improved	Audit Release Date:	06/10/2015
Department:	City Manager	Last Report Date:	First ARTS Report
Department Director:	Troy Schulte	This Report Date:	12/13/2016
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SECTION II: RECORD OF IMPLEMENTED RECOMMENDATIONS			
1. Implemented - 06/15/2015	4. Implemented - 06/15/15		
2. In Progress	5. Implemented - 07/01/15		
3. Implemented - 07/01/15			
SECTION III: SUMMARY OF IMPLEMENTATION EFFORTS			
Recommendation 1: In setting 311 goals, the city manager should ensure goals do not contradict legal and contractual limitations.			
<i>Status of Recommendation: Implemented</i>			
<p>The 311 PeopleSoft CRM system is not set up with set goals for completion, but rather each problem type has a Median Day timeframe set. This is based on the completion times for that problem type from the previous year. By using median day timeframes, departments can schedule priority work in a more efficient manner rather than being driven by a set time for completion.</p> <p>However, for the few problem types that have a time (ex: towing abandoned vehicles) determined by ordinance or contract, the system is now set up to reflect that specific time.</p> <p>The Auditor's Report indicated some departments still considered the timeframe set in the PS CRM system as an established goal so a module on how the Median Days are determined and set has been added to the PS CRM end user training provided to department users by the 311 Call Center.</p> <p>In setting up the EnerGov CRM system for 311 service requests, fields related to timeframes for completion will be labeled as an estimated timeframe and not as a set goal.</p>			
Recommendation 2: The city manager should establish a more consistent approach to defining and changing work group definitions of "closed."			
<i>Status of Recommendation: In Progress</i>			
<p>The 311 Call Center added additional information on resolving requests to the PS CRM end user training. The 311 staff also review closed service requests to ensure work is being completed before the requests are closed. Any requests closed without the work being completed are reopened with the actual creation date remaining the same.</p> <p>The "To Be Process" for EnerGov CRM outlines additional request statuses such as "On Hold" or "In Progress" that will help with processing and resolving requests appropriately.</p>			
Recommendation 3: The city manager should establish controls over the closing of 311 cases by performance management staff and the selective exclusion of data from analysis.			
<i>Status of Recommendation: Implemented</i>			
<p>The PS CRM system had two types of codes that were used for different reasons – one type was for service requests generated by customers (used the majority of the time) and the second type was for cases that served as a "place holder" and was generated by Performance Management and/or 311 Call Center staff. An example of this staff generated code was "Land Trust Lots" which was used to identify and label parcels with a continually open case that informed residents of the ongoing process the city was using to maintain the properties. Performance Management staff closed only these type of cases and excluded this data from performance reports as they did not reflect an actual request for service.</p> <p>Enhancements were made to the GIS map that eliminated the need for the "place holder" type of PS CRM cases so the Performance Management staff no longer needs to close cases or exclude CRM data from analysis allowing for better reporting especially in the 311 data in Open Data.</p>			

Recommendation 4: The city manager should ensure that 311 staff enter holidays in the city's 311 system timely.
<i>Status of Recommendation: Implemented</i>
The City holidays are entered into the PeopleSoft CRM system through December 31, 2018.
Recommendation 5: The city manager should minimize the number of cases assigned to the wrong group.
<i>Status of Recommendation: Implemented</i>
An upgrade to the PS CRM system was completed in July 2015. As part of the upgrade, improvements were made in the system that allowed for improved classification and assignment of service requests by both the 311 Call Center staff and department users.
SECTION IV: ADDITIONAL OUTCOMES
The 311 Call Center will be moving from the PS CRM system into the EnerGov CRM system before November 2017. These recommendations will be used in the design and implementation of the new CRM system.