

WORK ORDER 05- ARPA – ROI (Design)

CalSAWS BenefitsCal
(Portal/Mobile) Work Order

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1.0 Work Order Submission & Approval Form

Work Order Number	04
Work Order Title	ARPA – ROI (Design)
Submitted Date	05/04/22
Originator	California Department of Social Services (CDSS) Request
Priority	<p>Select the estimated priority level of the requested Work Order:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Critical – is necessary to avoid potential project stoppage. <input checked="" type="checkbox"/> High – is necessary to avoid potential significant impact to the goals and objectives of the project. <input type="checkbox"/> Medium – is necessary to avoid potential impact to the operational efficiency of project execution. <input type="checkbox"/> Low – needs to be addressed, but the estimated impact to the project is minimal.
Detailed Description	<p>This work order includes enhancements that are required to complete the cutover and transition to BenefitsCal for a variety of stakeholder groups to have provide additional access permissions and controls to perform a variety of functions in BenefitsCal:</p> <ul style="list-style-type: none"> • Release of Information (ROI) - Design <p>These features were not part of the original project scope and contract and were identified as part of the inclusive User Centered Design process. The features would significantly advance the customer experience, give more control to customers to determine who and what case information may be accessed, and/or significantly advance the capabilities available to Assistors and CBOs who support customers to obtain and maintain their benefits.</p> <p>This additional effort is in accordance with Chapter 35, Statutes of 2018 (Assembly Bill (AB) 1811, Committee on Budget). Implementation of the features should increase the number of individuals enrolled and reduce the churn for individuals receiving benefits and align with the feedback being received from stakeholders including Consortium, Advocates, State partners and CBOs such as CBO referral code and Archetype-based applications.</p>
Review Date	

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Type of Work Order	<input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Time & Material
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2.0 Work Order Impact Analysis – Release of Information (Design)

Describe the changes required to support this Work Order by resource type and provide a brief description of work to be completed.

Design Impact	<ul style="list-style-type: none"> Analyze the new ROI form, work with counties, CBOs and Consortium for design concepts Conduct focus group sessions and synthesize outcomes for design inputs based on the new form Provide design prototypes and follow an iterative approach for the user experience New screens for customer to provide the ability to search for and select a CBO/Assister to release their information New screen Customer will be able to revoke the ROI for a given CBO/Assister Update Customer Dashboard to display CBOs where the ROI has been granted Work with system architects, security engineers on the feasibility and security of the proposed design Update the CBO Dashboard to display additional information for a given customer, if/where ROI is granted Digitize the ROI form on the BenefitsCal customer dashboard New API to transmit ROI consent data to CalSAWS Design 2 new API to send ROI updates and receive ROIs initiated on the CalSAWS system
Development	<ul style="list-style-type: none"> Provide design inputs from system architecture and framework standpoint Building proof of concepts to digitize the new form and CBO experience for the design phase
Testing	<ul style="list-style-type: none"> Participate to design sessions and provide inputs from testing standpoint for the new APIs and screen changes functionality Start working on the test scenario creation and scripting
Performance Testing	<ul style="list-style-type: none"> None
Training	<ul style="list-style-type: none"> None
Communications	<ul style="list-style-type: none"> Project manager to provide planning, communications and status updates
Security	<ul style="list-style-type: none"> Analyze proposed design and provide inputs from security standpoint
Software/Licenses	None
Deliverables	<ul style="list-style-type: none"> Updated DEL 02 – Workplan

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(New and Updated)	<ul style="list-style-type: none"> Updated DEL 03 – Requirements Traceability Matrix (RTM) Updated DEL 05 – General Systems Design (GSD)
Schedule	<ul style="list-style-type: none"> None
Other	<ul style="list-style-type: none"> CBO must have an active account within BenefitsCal to gain access Access will be granted to the CBO organization as a whole CBOs will not be able to request consent of a Customer: the action must be initiated by the Customer
Assumptions	<ul style="list-style-type: none"> Stakeholders will be available to attend all requirements and design sessions. The estimate is based on the high-level information received. The actual effort hours may change based on requirement verification session. County and Consortium will be the point for conducting the user acceptance testing. There will not be any change to the infrastructure ROI data display rules will vary by program, managed within CalSAWS Customer can select from a distinct list of ROI expiration rules for each ROI, and these will not vary by program CalSAWS will manage the rules about which data elements can display by program based on the ROI Design sessions for ROI display rules by program will be held by CalSAWS, since the rules will be managed in the CalSAWS system

2.1 Work Order Hours / Fees

Estimated hours required to support this Work Order by resource type and provide a brief description of work to be completed, if applicable summarized below:

Estimated hours required to support this Work Order by resource type and provide a brief description of work to be completed, if applicable summarized below:

Type	Description	Rate	Hours	Amount
Design	UX Analyst	\$164.70	1100	\$181,170.00
Design	User Centered Design Analyst	\$148.23	920	\$136,371.60
Design Architecture	App Dev Lead	\$137.25	270	\$37,057.50

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Type	Description	Rate	Hours	Amount
Project Mgmt.	Project Manager	\$126.27	220	\$27,779.40
Security Design	Security Engineer	\$142.74	120	\$17,128.80
DevOps	Cloud Engineer	\$131.76	85	\$11,199.60
Test Input	Test/QA Lead	\$109.80	161	\$17,672.31
Total				\$428,379.21

2.2 Payment Schedule (If Applicable)

This Work Order is fully funded by the unallocated funds for additional Services provided under the Agreement added in Amendment No. One in the amount of Five Million Dollars (\$5,000,000).

Payment Point	Description	Milestone Date	WAC Date	Invoice Submission Date	Cost
Design Related SDLC Activities	Submission of DEL 05 GSD Deliverable	09/02/22	09/06/22	09/09/22	\$428,379.21

Invoice submissions require WAC and approval from consortium. The milestone date, the WAC date and the invoice submission date will need project manager agreement.

Enter any deliverable(s) which will be created to support this Work Order. Deliverables listed below will be provided to support this Work Order and upon approval of the Work Order are considered to be part of **Section 5.2 – Portal/Mobile App Deliverables and Services.**

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#	Deliverable Title	Description	Deliverable Submission Date
1	DEL 02 Workplan	Updates to the workplan to include work required to implement this work order.	07/10/21
2	DEL 03 RTM	Updates to the Requirements Traceability Matrix to include new requirements to implement this work order.	09/02/21
3	DEL 05 GSD	Updates to the General System Designs to specify the new functionality to implement this work order.	09/02/21

2.3 Consortium Responsibilities

If applicable, specify work(s) which will be supported by the Consortium for this Work Order.

Work	Work Description
	<ul style="list-style-type: none">Review and approve deliverable updates.

3.0 Work Order Execution

IN WITNESS WHEREOF, the Consortium has caused this Work Order to be subscribed on behalf of the Consortium and Contractor has caused this Work Order to be subscribed on its behalf by its duly authorized officer, as indicated below.

DELOITTE CONSULTING LLP

Dated: _____

By: _____

Name: _____

Title: _____

CALSAWS CONSORTIUM

Dated: _____

By: _____
Michael Sylvester, Consortium Chair

By: _____
Kronick Moskowitz Tiedemann & Girard,
Consortium Legal Counsel

By: _____
John Boule, Consortium Executive
Director