



***AMENDED, RESTATED AND REVISED  
LEADER REPLACEMENT SYSTEM  
AGREEMENT***

***Schedule 15 (Statement of Work for CalSAWS  
Customer Service Center Project) to Exhibit X  
(CalSAWS Maintenance and Operations (“M&O”)  
Extension),***

***Inclusive of  
Attachment 1 (Contractor Assumptions),  
Attachment 2 (CalSAWS Customer Service Center  
Pricing Schedule),  
Attachment 3 (CalSAWS Customer Service Center  
Functional Design Business Process Flows),  
Attachment 6 (CalSAWS Customer Service Center  
Solution Requirements)***

**CalSAWS Consortium,  
a California Joint Powers Authority**

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## **1. INTRODUCTION AND OVERVIEW**

For the purposes of this Schedule 15 to the Amended, Restated and Revised Leader Replacement System Agreement For A California Statewide Automated Welfare System ("Agreement") the meaning of all terms used in this Schedule 15 will have those meanings as set forth in the Agreement, unless otherwise specified herein. Furthermore, all Work performed pursuant to Schedule 15 will be subject to the terms and conditions of the Agreement, unless otherwise expressly stated in this Schedule 15. Section 1 (Introduction and Overview) describes the scope of Work CONTRACTOR will perform for the design, development, test, and implementation of the CalSAWS customer service center solution that will support the 58 CalSAWS Counties ("CalSAWS Customer Service Center Solution") and maintenance and operations ("M&O") associated with operating that solution for the CalSAWS System on a cloud-hosted architecture (collectively, the "CalSAWS Customer Service Center Project").

The CalSAWS Customer Service Center Project will modify the C-IV system's existing Amazon Web Services ("AWS") Connect-based customer service center solution ("C-IV Customer Service Center Solution") to support the 58 CalSAWS Counties and migrate Los Angeles County and the 18 CalWIN Counties to that solution. The CalSAWS Customer Service Center Project also includes modifications to the LRS System and the deployment of environments and services to support the CalSAWS Customer Service Center Solution. Schedule 15 also includes ongoing Production Operations services for maintenance and operations of the CalSAWS Customer Service Center Solution on the AWS cloud-hosted architecture through the Agreement's Initial Term.

### **1.1 SCHEDULE**

The term of this Scope of Work ("SOW") will commence on February 1, 2021 and continue through July 31, 2025.

## **2. SCOPE OF WORK**

This Section 2 describes the Work CONTRACTOR will perform under this SOW. Tasks 1 through 9 describe the Work CONTRACTOR will perform to design, develop, test, implement, maintain and operate the CalSAWS Customer Service Center Solution.

- 1. Task 1 – Project Management**
- 2. Task 2 – Design**
- 3. Task 3 – Build**
- 4. Task 4 – Automated Test**
- 5. Task 5 – System Test**
- 6. Task 6 – Training**
- 7. Task 7 – Model Office**
- 8. Task 8 – Enhanced Deployment Support**
- 9. Task 9 – Maintenance and Operations**

To accomplish the CalSAWS Customer Service Center Project, CONTRACTOR will work collaboratively with key stakeholders, including Users, and State, Federal, and other external agencies as necessary.

### **2.1 TASK 1: PROJECT MANAGEMENT**

The CONTRACTOR will provide resources responsible for the day-to-day management of the CalSAWS Customer Service Center Project. The CONTRACTOR resources will provide the following resources for managing the CalSAWS Customer Service Center Project:

- Project Manager

The Project Manager will be responsible for the day-to-day management and delivery of the design, development, testing, and maintenance and operations of the CalSAWS Customer Service Center Solution.

- IVR Lead

The IVR Lead will be responsible for the design, development, and deployment of AWS technologies (e.g. Connect, Lambdas, Kinesis, DynamoDB) and automated testing efforts required for the CalSAWS Customer Service Center Solution. The IVR Lead's responsibilities include the following:

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- Provide leadership on the delivery of the Amazon Connect solution, which includes providing guidance and management of the integration of services such as Connect, Lambda, and the API gateway;
- Create design and architecture documentation for the Amazon Connect instances and documentation for automated testing of certain components of the CalSAWS Customer Service Center Solution;
- Build automation to streamline Customer Service Center/IVR development;
- Manage the development of the CalSAWS Customer Service Center Solution's call control panel ("CCP"), which includes building data streaming and enabling agent teams within the CCP;
- Develop AWS Lambdas for IVR contact flows, agent events, and contact trace record ("CTR") event processors;
- Build and execute cloud formation templates for both account-level resources and Amazon Connect instance-level resources;
- Enable the implementation of services such as web chat and voice biometrics;

- **Technical Architecture Manager**

The Technical Architecture Manager is responsible for the day-to-day management of the design, development, testing, and maintenance and operations of the technical architecture of the CalSAWS Customer Service Center Solution. The Technical Architecture Manager's responsibilities include the following:

- Manage the design of the technical architecture for the Administration Page and External Party Access ("EAP") functionality;
  - Manage the development of the Administration Page to include single sign-on functionality;
  - Manage the user centered design effort for the design of the CCP and the Administration Page;
- **Application Development Leads**

The Application Development Leads will be responsible for the day-to-day management of the design, development, testing, and maintenance and operations of the Application Development-related tasks for the CalSAWS Customer Service Center Project. The Application Development Leads will oversee updates to the LRS/CalSAWS System's batch and online pages that are required for the CalSAWS Customer Service Center Project, including the development and validation of telephonic signature functionality.

Additionally, CONTRACTOR will provide one (1) part-time resource for work plan management. The CONTRACTOR will maintain a work plan for the CalSAWS Customer Service Center Project and provide CONSORTIUM with access to that work plan.

## **2.2 TASK 2: DESIGN**

The CONTRACTOR will create design documentation and update existing C-IV Customer Service Center Solution-related design documentation to address how the requirements for the CalSAWS Customer Service Center Solution will be implemented. Designs for requirements will be attached to System Change Requests ("SCRs") that will be implemented in the CalSAWS System for the CalSAWS Customer Service Center Project. The design documentation will include the following:

### **2.2.1 Subtask: Customer Service Center/IVR**

The CalSAWS Customer Service Center Project includes the creation of call flows, reports, work force management, quality assurance, quality management, call control panel ("CCP"), and regional contact centers ("RCCs") for Los Angeles County and the 18 CalWIN Counties and updating the existing solution for the 39 C-IV Counties to include new functionalities, as detailed below. The CONTRACTOR will perform the following tasks for the customer service center and IVR design:

- IVR Call Flows

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- Creation of customized call flows for Los Angeles County and the 18 CalWIN Counties will be based upon the following existing functionality from the C-IV Customer Service Center System:
  - Check benefit amounts for the following programs:
    - Medi-Cal
    - CalFresh
    - CalWORKs
    - Welfare-to-Work
  - Check the status of one of the following forms:
    - SAR 7
    - Balderas
    - 960x
  - Resend SAR 7 form
  - Authentication
  - Voice authentication enrollment
  - Courtesy callback
  - Post-call survey
  - Webchat
  - Change/request IVR PIN
  - Check office hours
  - Remote closure of customer service centers (“Remote Closure”)
  - Queues
- Customized call flows for the following new functionalities that will support the 58 CalSAWS Counties:
  - Additional languages
  - Administration Page
  - Telephonic Signature
  - External Party Access
  - Scheduled Callback
- Update design documentation for verbiage document template



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- Create design documentation for obtaining language translations for additional languages
- Update design documentation for collecting post call survey questions to include Los Angeles County and the 18 CalWIN Counties
- Create design documentation to include the functionality for customers to initiate webchat and click-to-call from the Consortium's Statewide portal to communicate with a County worker
- Create design documentation to include the functionality for customer service center staff to work remotely
- Update design documentation for Remote Closure to include the functionality for Counties to call into the remote closure application to record an emergency and/or informational message to play in the IVR
- Update design documentation for the self-service program menu to include Los Angeles County and the 18 CalWIN Counties
- Reporting/Work Force Management (WFM)/Quality Assurance (QA)/Quality Management (QM)
  - Update existing design documentation related to customer service center reporting, WFM, and QA/QM to support Los Angeles County and the 18 CalWIN Counties
  - Update existing design documentation for the Inbound/Outbound Call Report to support Los Angeles County and the 18 CalWIN Counties
  - Create design documentation for the following ten (10) static reports that can be exported from the customer service center's reporting tool in Microsoft Excel format:
    - Agent Summary
    - Queue Summary
    - Contact Detail
    - Contact Routing Summary
    - Dialed Number Summary
    - Agent State Detail
    - Agent Offline Summary

- Agent Realtime
  - Queue Realtime
- Create design documentation for the webservice and process for Counties to export the contact trace record (“CTR”) data from each County’s Amazon Connect instance
- Create design documentation for the webservice for exporting County call recordings and metadata from the WFM/QA/QM tool
- Update design documentation for the Amazon Connect Console to include the new Counties
- Call Control Panel (“CCP”)
  - Update design documentation related to the CCP to include Los Angeles County and the 18 CalWIN Counties
  - Update design documentation related to the CCP to include 4-way conference calling functionality
  - Update the design documentation related to the CCP to include functionality for the Download Logs button to send backend CCP logs to an Amazon Simple Storage Service (“S3”) bucket
  - Update design documentation related to the CCP to include time of call
  - Update design documentation related to the CCP’s “Message of the Day Sender” feature to include role management
- RCC
  - Update existing design documentation related to the C-IV Counties’ RCCs to support Los Angeles County and the 18 CalWIN Counties
- CalSAWS Application Integration
  - Create the following additional webservices:
    - Up to one (1) webservice to support community-based organization (“CBO”) authentication
    - Up to one (1) webservice for telephonic signature metadata capture

- Up to one (1) webservice for telephonic signature to associate signature to form(s)
- Up to one (1) webservice for telephonic signature task creation
- Update existing webservices for the C-IV Customer Service Center System to support Los Angeles County and the 18 CalWIN Counties

### **2.2.2 Subtask: Environments**

- Create design documentation relating to the following environments for the CalSAWS Customer Service Center Solution:
  - One (1) production environment for each of the 58 Counties
  - Two (2) assembly test (AT) environments
  - Four (4) system test (ST) environments
  - Two (2) user acceptance testing/training environments
  - One (1) staging environment
  - One (1) CalSAWS application development environment which will support the above-mentioned environments for the CalSAWS Customer Service Center Solution

### **2.2.3 Subtask: Administration Page**

CONTRACTOR will design an Administration Page within the CCP that will allow County staff with the appropriate permissions to make changes to their customer service center as further detailed below. The designs for the business processes and functionalities associated with the Administration Page will be based on the process flows documented in Attachment 3 (CalSAWS Customer Service Center Functional Design Business Process Flows). The design of the Administration Page will include the following:

- Create design documentation for the data model, API, architecture and infrastructure required for supporting the Administration Page
- Create design documentation for the following features of the Administration Page:
  - Emergency Closure:

- Open the call center
- Close the call center
- Add a new queue hold message or delete an existing queue hold message
- Courtesy Callback:
  - Turn on courtesy callback
  - Turn off courtesy callback
- Scheduled Callback:
  - Turn on scheduled callback
  - Turn off scheduled callback
- Queue Limits:
  - Enter a queue limit
- After Call Work:
  - Set the After-Call Work
- Roll-on/off or Update Agent:
  - Add a new agent by completing following fields:
    - First name
    - Last Name
    - County E-mail
    - Windows Login ID
    - Team
    - Role
  - Update information for an existing agent based on one (1) or more of following fields:
    - First name
    - Last Name
    - County E-mail
    - Windows Login ID
    - Team
    - Role
  - Delete an existing agent

- Emergency Message:
  - Add a new message
  - Delete an existing message
  - Play a different message
- Informational Message:
  - Add a new message
  - Delete an existing message
  - Play a different message
- Supervisor Email Notification:
  - Set triggers for an email notification for the following metrics:
    - Number of calls waiting in queue
    - Longest wait time
    - After Call Work limit
    - Number of available agents
    - Agents in Rolled Over Not Ready (“RONA”) status
  - Create/Delete Team:
    - Add a new team
    - Delete an existing team
    - Disassociate users/agents from a deleted team

#### **2.2.4 Subtask: Outbound IVR Campaign**

The outbound IVR solution for the CalSAWS Customer Service Center Solution will include outbound call campaigns that will call a customer who has opted in to receive document reminders and appointment reminders. “Appointment reminders” are reminders for customers who have an upcoming scheduled appointment. “Document reminders” are reminders for customers who have a past due SAR 7 form. The CONTRACTOR will create design documentation for business processes and functionalities related to outbound IVR calling campaigns that will be based on those in Attachment 3 (CalSAWS Customer Service Center Functional

Design Business Process Flows). The CONTRACTOR will perform the following tasks related to design of the outbound IVR call campaign solution:

- Update existing design documentation for the C-IV Customer Service Center System's outbound IVR campaign to include:
  - Los Angeles County and the 18 CalWIN Counties
  - Reflect additional languages that will be implemented for the solution
  - Functionality for transferring a call to a County queue or phone number for appointment rescheduling
  - Functionality for the customer to receive an email notification if they opted in to receive emails, have a missing SAR7, and request for the SAR 7 form to be re-sent
  - Functionality to display County caller ID to the customer
- Create design documentation for the CalSAWS System to create a task when a customer cancels an appointment during an outbound IVR call Telephonic Signature

#### **2.2.5 Subtask: Telephonic Signature**

The Telephonic Signature solution for the CalSAWS Customer Service Center Solution would allow County staff to offer a customer the ability to sign forms verbally. The CONTRACTOR will create design documentation for Telephonic Signature-related business processes and functionalities based on the business process flows documented in Attachment 3 (CalSAWS Customer Service Center Functional Design Business Process Flows). The design will include the following functionalities:

- CalSAWS System Users can update a transcript of a customer's attestation and populate metadata fields while recording a customer's telephonic signature
- Creation of an auto-journal when a telephonic signature has been captured and creation of a task within the CalSAWS Application
- Customer Service Center agents can press a button in the CalSAWS application or the CalSAWS Customer Service Center Solution's CCP to initiate the

recording of a telephonic signature and end the recording. The recording will be stored as an individual file and associated with the customer's case and specific forms that were signed via the customer's attestation. Agents will have the ability to access, listen to, and download the recording from a customer's case via the CalSAWS application.

- Designated County staff will have the ability to select a single generated document or multiple documents and associate a recording to those selected document(s).
- County worker located at an office outside of a customer service center will have the ability to enter a phone number (and phone number extension, if applicable) into the CalSAWS application to initiate the Telephonic Signature solution to make a call to that specified phone number and commence the process for recording a customer's attestation.

#### **2.2.6 Subtask: External Party Access**

The External Party Access solution for the CalSAWS Customer Service Center Solution will allow authorized external parties (e.g. CBOs, other providers, County agencies) to contact a specific Customer Service Center agent by calling a specific phone number within the IVR system and authenticating with a PIN, and the IVR will transfer the call to the destination/Customer Service Center agent. The design for the External Party Access solution will be based on business processes and functionalities that are documented in Attachment 3 (CalSAWS Customer Service Center Functional Design Business Process Flows). The External Party Access Design will include the following:

- Contact flows
- Unique PINs that will be assigned and managed by the Counties via the CalSAWS application. The PINs will be used by the external parties for identification and authentication purposes.
- Authorized representatives will include CBOs, other providers, and County agencies

### **2.2.7 Subtask: Scheduled Callback**

The CalSAWS Scheduled Callback solution will allow a customer to request a scheduled callback if that customer is calling outside of the County's configured hours of operation or if a County's queue limit has been reached. The design for the Scheduled Callback solution will be based on business processes and functionalities that are documented in Attachment 3 (CalSAWS Customer Service Center Functional Design Business Process Flows). The design for Scheduled Callback will include the following:

- Contact flows
- Up to fifteen (15) queues for supported languages
- Counties will have the ability to offer up to eight (8) timeslots per day, of which the customer can select one timeslot for the scheduled callback

### **2.2.8 Subtask: User Centered Design**

The CONTRACTOR will integrate user centered design ("UCD") into the design process for the CCP and the Administration Page. Integration of UCD into the design process will include:

- Facilitating and scheduling User Design Sessions
- Integrating UCD session feedback into design documents

The CONTRACTOR will work with representatives of the 58 CalSAWS Counties via the Consortium's CalSAWS IVR/Contact Center committee to obtain confirmation and approval of the overall design. The Consortium's CalSAWS IVR/contact center committee will approve the overall design for the CalSAWS Customer Service Center Solution. Build activities will commence following the committee and the Consortium's Change Control Board's approvals of the design; approval by the CONSORTIUM's SCR Planning Group ("SPG") is not required for SCRs related to the CalSAWS Customer Service Center Project.



### **2.2.9 Subtask: API Integration**

The CONTRACTOR will design application programming interfaces (“APIs”) and integration points for the third-party customer relationship management (“CRM”) tools that interface with the LRS/CalSAWS System for Los Angeles County. These APIs and integration points will enable the Consortium’s CRM tools to search cases by additional fields (e.g. notices of action or “NOAs” and tasks). The design for APIs and integration points for the third-party customer CRM tools will include:

- Update API documentation for Case API
- Update API documentation for Program API
- Update API documentation for Task API
- Update API documentation for Imaging API
- Create documentation for File Service API

## **2.3 TASK 3: BUILD**

The CONTRACTOR will perform configuration and build activities for the following functional areas for the CalSAWS Customer Service Center Solution, as further described below.

### **2.3.1 Subtask: Automation**

The CONTRACTOR will deploy AWS services required to support the CalSAWS Customer Service Center Solution through automation. To build the automation, the CONTRACTOR will perform the following tasks:

- Enable DevOps; refactoring
  - Create repositories for storing templates
  - Set up Jenkins in accounts
  - Create an Active Directory security group to be configured with Jenkins
  - Validate and smoke test Jenkins access
  - Refactor deployment templates for AWS Lambda functions
  - Finalize pipeline design for AWS Lambda functions
  - Create generic CloudFormation template for AWS Lambda functions

- Create CloudFormation templates for network (security group), event source, IAM policy, AWS services
- Create input and output JSON files for Lambda (post deploy test)
- Create properties files, Groovy modules, component pipelines for AWS services
- Create automation to update the reporting tool S3 folder with County specific queue ARNs in JSON
- Create pipelines folders
- Build component pipelines for reporting, WFM, and QA/QM
- Update Amazon S3 bucket CloudFormation template to handle both regular CCP and non-CCP buckets
- Build generic DynamoDB template
- Build generic templates for Kinesis, Firehose, SQS, and API gateways
- Refactor AWS Lambda functions that support the WFM/QA/QM tool
- Build Utility component pipeline
  - Build Groovy modules for User Management and Teams
  - Create properties file for Utility component
  - Build component pipeline for Utility
- Build common component pipeline
  - Build common Groovy modules
  - Create common module properties
- Build Common Apigee pipeline
  - Build Apigee Groovy modules
  - Build Apigee pipelines

### **2.3.2 Subtask: Customer Service Center/IVR**

The CalSAWS Customer Service Center and IVR build will include building customized call flows, customizations for the CCP, and regional contact centers (“RCCs”) required to support Los Angeles County and the 18 CalWIN Counties and updating the 39 C-IV Counties’ customer service center solution to include new functionalities. CONTRACTOR will perform the following build activities:

- Call Flows/IVR
  - Build customized call flows for Los Angeles County and each of the 18 CalWIN Counties, which will leverage existing functionality from the C-IV Customer Service Center Solution:
    - Check benefit amounts for the following programs:
      - Medi-Cal
      - CalFresh
      - CalWORKs
      - Welfare-to-Work
    - Check the status of one of the following forms:
      - SAR7
      - Balderas
      - 960x
    - Resending a SAR 7 form
    - Authentication
    - Voice authentication enrollment
    - Courtesy callback
    - Post-call survey
    - Webchat
    - Change/request IVR PIN
    - Check office hours
    - Remote Closure
    - Queues
  - Create one verbiage document per instance
  - Coordinate with voice talent vendor for recording of prompts
  - Process audio files and prompts provided by voice talent vendor
  - Validate naming convention of audio files
  - Collect post-call survey questions from Los Angeles County and the 18 CalWIN Counties

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- Build functionality for customers to initiate webchat from the Consortium's CalSAWS Statewide self-service portal to communicate with a County case worker
- Build functionality for County Customer Service Center staff to work remotely
- Build functionality for Counties to call into the Remote Closure application to record an emergency and/or informational message to play in the IVR
- Update one (1) new batch job to read comma separated values ("CSV") file. The purpose of this batch job is to store data from the IVR S3 in the new table for voice biometrics functionality.
- Update eight (8) aggregate table batch jobs for the IVR
- Reporting, WFM, QA/QM
  - Update the Inbound/Outbound Call Report to include the Customer Activity metric
  - Build the functionality for Counties to configure their own reports, leveraging the Amazon Connect data that is available via the reporting tool
  - Build API Apigee gateway
  - Build the following ten (10) static reports and enable them to be exportable via Microsoft Excel:
    - Agent Summary
    - Queue Summary
    - Contact Detail
    - Contact Routing Summary
    - Dialed Number Summary
    - Agent state Detail
    - Agent Offline Summary
    - Agent Realtime
    - Queue Realtime

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- Build the functionality for Counties to export the Contact Trace Record (“CTR”) data from their County’s Amazon Connect instance
- Build a webservice to export County call recordings and metadata from the WFM/QA/QM tool
- Configure Amazon Connect Console for the County staff of Los Angeles County and the 18 CalWIN Counties to use the Amazon Connect Console to:
  - Configure routing profiles for their agents
  - View Amazon Connect’s real-time and historical agent and queue reports
  - Configure Quick Connects within Amazon Connect
- CCP
  - Build 4-way conference calling functionality for conference calls executed via the CCP
  - Add link to the CCP in the CalSAWS System
  - Build functionality to enable screen pops for the CalSAWS application and call log on incoming calls
  - Integrate API with Apigee
  - Build the following to be displayed to the customer service center agent on the CCP:
    - Agent status
    - Ready
    - After Call Work
    - Up to fifteen (15) “Not Ready” statuses
    - Useful links as chosen by the County
    - Queue statistics information for the queues in the agent’s routing profile
    - Agent statistics for the current day
    - Phone book which consists of County-configured Amazon Connect Quick Connects

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- One (1) button each for hold, transfer, consult, conference, mute, and end call
- “Message of the Day” panel where the agent can view global messages sent by a Message of the Day sender
- Update the Download Logs functionality that sends backend CCP logs to an Amazon S3 bucket
- Build the following to be displayed on a customer service center supervisor’s CCP in addition to information that would be displayed on a County customer service center agent’s CCP:
  - Team performance panel with assigned team(s), agents in the team(s), and the agents’ statuses
  - One (1) button each to monitor a live call, change an agent’s status to ready, change an agent’s status to “not ready,” and sign out an agent
- Build functionality in the Message of the Day application for a sender to input a message of up to 500 characters in a panel on their CCP, and have that message delivered to every agent’s CCP within a County’s customer service center
- Build the Transfer Notes feature which will display a message from the transferrer to the transferee when a call is transferred
  - Build screen pop functionality such as the Journal screen pop and CalSAWS application screen pop when an incoming call is received
  - Update the call banner that displays when an incoming call is received
  - Update time of call
  - Update Message of the Day functionality to include role management for senders
- Integrate the CCP’s ForgeRock security and single sign-on (“SSO”) with the CalSAWS System

- **RCC**
  - The CONTRACTOR will configure the inbound IVR that supports transfers from Covered California's customer service center to route calls to the appropriate County queues. The IVR will:
    - Capture the tracker ID, County code, and language code
    - Offer the Courtesy Callback option to a caller
    - Provide a voicemail option for transfers outside of regular hours of operation and holidays
  - The CONTRACTOR will configure the Inbound IVR that supports transfers from Covered California's customer service center to automatically route calls between Counties in the event the intended County is unavailable due to the following reasons:
    - Holiday
    - Logged Out
    - Closed for emergency

### **2.3.3 Subtask: Environments**

The CONTRACTOR will build and configure properties of the following environments to support the CalSAWS Customer Service Center Solution and IVR:

- One (1) production environment for each of the 58 Counties
- Two (2) assembly test (AT) environments
- Four (4) system test (ST) environments
- Two (2) user acceptance testing/training environments
- One (1) staging environment
- One (1) CalSAWS application development environment which will support the above-mentioned environments for the CalSAWS Customer Service Center Solution

### **2.3.4 Subtask: Administration Page**

The Administration Page within the CCP will allow County staff with the appropriate permissions to make changes to their County's customer service center

based on the business process flows documented in Attachment 3 (CalSAWS Customer Service Center Functional Design Business Process Flows). The CONTRACTOR will perform the following tasks for the Administration Page:

- Build the data model to support the Administration Page
- Build nine (9) REST API/Amazon Lambda functions for integrating with AWS Connect APIs
- Configure APIs (via Apigee) and Amazon Lambdas functions to support the Administration Page
- Create single page app skeleton
- Build nine (9) React components for the Administration Page
- Integrate Administration Page's security with the LRS/CalSAWS System's ForgeRock solution
- Setup and configure DynamoDB
- Create security roles for the Administration Page
- Build "Emergency Closure" functionality for two (2) options:
  - Open customer service center
  - Close customer service center
- Build "Queue Hold Messages" functionality:
  - Add a new message or delete an existing message
  - Allow messages up to a length of 260 words
  - Allow up to ten (10) messages to be saved and played
  - Play 60 seconds of queue music between each queue message
- Build "Courtesy Callback" functionality based on two (2) options:
  - Turn on Courtesy Callback
  - Turn off Courtesy Callback
- Build "Scheduled Callback" functionality based on two (2) options:
  - Turn on Scheduled Callback
  - Turn off Scheduled Callback
- Build "Queue Limits" functionality:
  - Build functionality for County staff to specified queue limit
  - Build queue limit range of up to 50 queues



- Build ‘After Call Work’ functionality:
  - Build functionality for County staff members to change After Call Work limit
- Build “Roll-on/off or Update Agent” functionality and process for three (3) options:
  - Add a new agent
  - Update an existing agent
  - Delete an existing agent
- Build the following six (6) fields for agents:
  - First name
  - Last name
  - County e-mail
  - Windows login ID
  - Team
  - Role
- Build “Emergency Message” functionality:
  - Add a new message
  - Delete an existing message
  - Play a different message
- Build “Informational Message” functionality:
  - Add a new message
  - Delete an existing message
  - Play a different message
- Build “Supervisor Email Notification” functionality for supervisors to receive notifications based on the following metrics:
  - Number of calls waiting in queue
  - Longest wait time
  - After call work limit
  - Number of available agents
  - Agents in RONA status

- Build “Create/Delete Team” functionality based on the following two (2) options:
  - Add a new team
  - Delete an existing team

### **2.3.5 Subtask: Outbound IVR Campaign**

The outbound IVR solution for the CalSAWS Customer Service Center Solution will include outbound calling campaigns that will call a customer who has opted in to receive document reminders and appointment reminders. “Appointment reminders” are reminders for customers who have an upcoming scheduled appointment. “Document reminders” are reminders for customers who have a past due SAR 7 form. The CONTRACTOR will build the outbound IVR campaign solution to include the following:

- Document reminders for the following documents:
  - Missing SAR7s
    - Allow the customer to request the form to be resent to them.
    - Allow the customer to receive an email if the customer signs up for email notifications
  - Balderas
  - 960x
- Appointment reminder for upcoming appointments, which will allow the customer to choose the following options:
  - Confirm appointment
  - Cancel appointment. The CalSAWS System will create a task when the customer selects this option

The CONTRACTOR will implement functionality from the 39 C-IV Counties’ existing outbound IVR campaign solution Los Angeles County and the 18 CalWIN Counties. The CONTRACTOR will perform the following tasks:

- Configure the Amazon S3 bucket to store document reminder campaign info file

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- Configure Amazon EventBridge trigger so that once an object is uploaded to Amazon S3, that object will be sent to the Amazon Simple Queue Service (“SQS”)
- Configure the AWS CloudTrail to record call activity and deliver log files to Amazon S3 bucket
- Configure the Amazon S3 bucket for AWS CloudTrail logs
- Configure the Amazon SQS to support the existing functionality that would be implemented for Los Angeles County and the 18 CalWIN Counties
- Configure the queue for failed messages
- Build the AWS Lambda to read the data and store in Dynamo DB
- Configure Amazon Simple Notification Service (“SNS”) to send email notifications regarding failed messages
- Deploy the AWS Lambda to handle the failed cases
- Build Amazon EventBridge to trigger the call scheduling
- Update remote AWS Key Management Service (“KMS”) key policy
- Deploy three (3) AWS Step Functions to orchestrate the outbound calls
- Deploy six (6) AWS Lambda functions for calls scheduling invoked by AWS Step Functions
- Deploy three (3) tables in Dynamo DB to store processed files info, call schedule statuses, and call results statuses
- Deploy two (2) AWS Lambda functions for document reminders and resending forms
- Deploy the Amazon Connect instance and contact flows
- Upload prompts and validate contact flows
- Deploy Amazon EventBridge to trigger the Amazon Lambda function that will write the call results to CalSAWS System
- Deploy the AWS Lambda function that will generate the call results CSV file
- Configure the Amazon S3 bucket to store the exported call results file
- Create Amazon S3 policy template

- Deploy two (2) AWS Lambda functions for appointment reminders and appointment cancellations

The CONTRACTOR will build new outbound IVR campaign functionality for 58 Counties by performing the following tasks:

- Build the Outbound Campaign call to display County caller ID
  - Create a DynamoDB table to store the County Instance Number and County Code
  - Update the AWS Lambda call for outbound API call with source phone number to be County number
- Build the functionality for the CalSAWS System to create a task when a customer cancels their appointment during a CalSAWS outbound IVR campaign call
  - Update existing rest API Endpoint to create a new task when customer chooses to cancel the appointment
  - Create new AWS Lambda which invokes the new REST API Endpoint
- Build the outbound IVR campaign solution to support additional languages
  - Configure script for automation for uploading prompts to instances
  - Update the text-to-speech (“TTS”) speech synthesis markup language (“SSML”) for existing languages supported by the C-IV Customer Service Center System and for additional languages
  - Update script for automating updates to contact flows with prompt Amazon Resource Name (“ARN”)
  - Update verbiage spreadsheet to include additional languages
- Build the functionality for the outbound IVR campaign call to transfer to a County queue or phone number for appointment rescheduling
  - Build the Landing Contact flow for each County’s customer service center and claim a new phone number

- Build the functionalities for a customer to receive an email notification when that customer has a missing SAR 7 form (if that customer has opted in to receive email notifications) and for a customer to request a SAR 7 form to be re-sent.
  - Create a new endpoint to check if the customer opted for email and send email notification
  - Update the existing batch job PI00M300 to send the document reminders for QR7 and Balderas documents
  - Update the existing batch job PI00M301 to send the document reminders for QR7 and Balderas documents
  - Update the existing batch job PI00M302 to send the document reminders for QR7 and Balderas documents
  - Create BPCR/BSCR for new job for Call Results codes
  - Code values for Call Results
  - Implement data base change request (“DBCR”) for new data elements for inbound/outbound IVR report for voice biometrics
  - Create a job that retrieves the CSV file from the IVR System for voice biometrics

### **2.3.6 Subtask: Telephonic Signature**

The CalSAWS Customer Service Center Solution will include a solution for telephonic signature. The telephonic signature solution will leverage the C-IV System’s existing electronic signature solution and will allow a County worker to offer a customer the ability to sign forms verbally. The CONTRACTOR will perform the following tasks for building the telephonic signature solution:

- Update the Electronic Signature page within the CalSAWS System to allow a County worker to listen to a customer’s telephonic signature
- Implement a code table change request (“CTCR”) to add an option to the Electronic Signature page for telephonic signature
- Configure page mapping for the Electronic Signature page
- Implement a DBCR for the Electronic Signature page

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- Create a webservice to have Amazon Connect call a County worker to sign the forms when the field of “Contact Center Worker” is set to “no” for a telephonic signature
- Create webservice to open the softphone for a worker to sign the forms when the field of “Contact Center Worker” is set to “yes” for a telephonic signature
- Build functionality to allow a designated County worker to update a transcript of an attestation and fill out metadata fields while that worker is recording the customer’s telephonic signature
  - Create the contact flow for telephonic signature in the Statewide instance
  - Update the existing AWS Lambda that supports electronic signature functionality to allow multiple documents to be returned
  - Create an AWS Lambda to send speech to text to the attestation field
  - Upload the Rights and Responsibilities prompts
- Build the functionality to create an auto-journal when a telephonic signature has been captured and create a task within the CalSAWS System
  - Create an AWS Lambda function to auto-journal for telephonic signature functionality
  - Create a new webservice endpoint for auto-journaling
  - Create a new AWS Lambda function to create tasks
- Build the functionality to allow a Customer Service Center agent to press a button in the CalSAWS application or the CCP to indicate the start of a telephonic signature and again to indicate the end. The recording will be stored as an individual file and associated with the case and specific forms that were signed. This recording can be accessed, listened to, and downloaded from the case in the CalSAWS application.
  - Create an AWS Lambda function to send metadata to the Telephonic Signature page
  - Update the CCP to include a “Telephonic Signature” button and “Capture Code” field

- Create an AWS Lambda to send the Capture Code to and from the CCP and to start the telephonic signature application
- Build the functionality to allow a designated County worker to select a single generated document or multiple documents to associate the signature to
- Build the functionality for the Telephonic Signature solution to call a non-customer service center worker after that worker enters their phone number (and phone number extension, if applicable) via the CalSAWS application

### **2.3.7 Subtask: External Party Access**

The External Party Access (“EPA”) solution within the CalSAWS Customer Service Center Solution will allow authorized external parties (e.g. CBOs, other providers, and County agencies) to call a specific phone number, authenticate with a PIN, and be transferred to the call's destination County agent. The CONTRACTOR will perform the following tasks for building the External Party Access solution:

- Build global contact flow
- Build an EPA queue transfer contact flow
- Claim EPA transfer numbers and store them in Amazon DynamoDB
- Build API gateway and AWS Lambda function to check Holiday DynamoDB table before transferring the call
- Build API gateway and AWS Lambda function to check for hours of operation, emergency, and technical issues before a call is transferred
- Build AWS Lambda function that uses the GetCurrentMetricData API to check if customer service center agents are online in a different account before transferring the call
- Add contact flow prompts
- Integrate and support API with Apigee
- Build a solution to include unique PINs – assigned and managed by the County in the CalSAWS application – to be used by the external parties for identification and authentication purposes
  - Build AWS Lambda function that validates user input (PIN)

- Build AWS Lambda function that checks the PIN in the CalSAWS database and validates if the User is a CBO
- Build REST Apigee endpoint to check for PIN
  - Update the Authorized Representative Detail page to display the IVR PIN with the ability to reset the PIN
  - Update the Resource Detail page to display the IVR PIN with the ability to reset the PIN
  - Update page mapping for the Resource Detail page and Authorized Representative Detail page
  - Create tables to support External Party Access
  - Update the batch job to support External Party Access

### **2.3.8 Subtask: Scheduled Callback**

The Scheduled Callback solution within the CalSAWS Customer Service Center Solution will allow a customer to request a scheduled callback if they are calling outside of the County's configured hours of operation or if the County's maximum queue limit has been reached. The CONTRACTOR will perform the following tasks for building the Scheduled Callback solution:

- Build contact flows
- Build new Amazon DynamoDB table(s)
- Build and deploy up to three (3) new AWS Lambda functions
- Configure up to fifteen (15) queues to include supported languages as listed in Attachment 1 (Contractor Assumptions)
- Build the functionality for Counties to offer up to eight (8) timeslots per day for the customer to choose from
- Build the functionality to offer the customer to pick one of the available scheduled call back timeslots

### **2.3.9 Subtask: API Integration**

The CONTRACTOR will build application programming interfaces ("APIs") and integration points for the third-party customer relationship management ("CRM") tools that interface with the LRS/CalSAWS System for Los Angeles County.



These APIs and integration points will enable the Consortium's CRM tools to search cases by additional fields (e.g. notices of action or "NOAs" and tasks). The CONTRACTOR will perform the following tasks to update existing LRS/CalSAWS APIs and integration points for the third-party customer CRM tools:

- Update the Case API to include worker information
- Update the Program API to include Redetermination and Periodic reporting dates
- Update the Task API to allow for the storage of ticket number and retrieval of task by ticket number
- Update the Documents API to return the address and meta data for documents generated from by the LRS/CalSAWS System and document ID to view document in Amazon S3
- Update imaging API to include a URL to the CalSAWS imaging solution
- Update automated regression testing for Case API
- Update automated regression testing for Program API
- Updated automated regression testing for Task API
- Update automated regression testing for Documents API
- Update automated regression testing for Imaging API
- Add automated regression testing for File Service API
- Update Task Detail page to remove automation to send message to Lagan to close a task

## **2.4 TASK 4: AUTOMATED TEST**

The CONTRACTOR will execute automated testing of SCRs for implementing requirements for the CalSAWS Customer Service Center solution, including testing functionalities for the IVR, RCC, outbound IVR campaign, External Party Access, and Scheduled Callback. The CONTRACTOR will perform the following tasks related to automated testing:

#### **2.4.1 Subtask: Develop Automated Test Plan**

The CONTRACTOR will develop and code automated test scripts for the CalSAWS Customer Service Center Solution, which will include the following tasks:

- Design frameworks and pipeline for utilizing the CalSAWS Project's existing tools for automated testing
- Update the CAT Framework to support testing of the CCP and the Administration Page
- Configure test pipeline
- Design test scripts/test scenarios for:
  - IVR/self-service
    - RCC
  - Outbound Campaign
  - External Party Access

#### **2.4.2 Subtask: Execute Automated Test Plan**

The CONTRACTOR will execute the above-mentioned automated test plan for the CalSAWS Customer Service Center Solution, which will include the following tasks:

- IVR/Self-Service
  - Create dataset template for Cyara
  - Run execution and fix/rerun test cases in Cyara for automated testing
  - Support English, Spanish, and additional languages for automated testing
  - Develop Groovy Framework for Cyara Test Cases Execution
  - Build and execute test scripts for the following items within the IVR system:
    - Welcome Menu
    - General Menu
    - Program Menu
    - Collect Zip Code

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- Office Information
- Info
- New Applicant Menu
- New PIN Request
- Holiday Message
- Emergency Message
- Max Queue
- Login Menu
- Collect Case
- Office Closed
- Collect PIN
- Self Service Menu
- Dynamic menu for obtaining benefit information, which will support the following programs:
  - Medi-Cal
  - CalFresh
  - CalWORKs
  - WTW
- Dynamic menu for Document Request, which will support the following:
  - SAR 7
  - Gen 2000
  - TMC
- Dynamic Menu for document status, which will support the following options:
  - Change PIN
  - EBT/BIC Replacement options
  - Appointment Menu
  - Agent Service Menu
  - Login Menu
  - Collect SSN

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- Collect DOB
  - Self Service Menu
  - Option for no input or no match from customer
- Voice Login Menu
  - Voice Enrollment Menu
  - Voice Enrollment
  - Voice Verification
  - Courtesy Callback
  - Post Call Survey
  - Remote Admin
- Outbound IVR Campaign:
  - Create Test Data for Outbound Configuration
  - Execute and fix/rerun test cases
  - Build and execute test scripts for the following items:
    - Welcome menu
    - Appointment reminder
    - Confirm appointment
    - Cancel appointment
    - Document reminder
    - Resend document
    - Collect case
    - Case validation
    - Collect PIN
    - Login results
    - Collect DOB
    - Report validation
    - Non-CSC reporting flag
    - End Call
    - Email notification
- External Party Access:

- Create test cases
- Build and execute test scripts for the following items:
  - Welcome Menu
  - Collect PIN
  - Login results
  - Holiday/emergency/hours of operation
  - Validate if agents are online
  - Transferring to County IVR/queue
- Validate County customer service center agent answers the call
- Scheduled Callback:
  - Set up Scheduled Callback test data using Cyara
  - Build and execute test scripts for the following:
    - Menu to offer Scheduled Callback
    - Scheduled callback offered for after-hours and holidays
    - Scheduled callback offered for maximum queue condition
  - Validate updates to scheduled callback table in Amazon DynamoDB
  - Validate callback occurs at the scheduled time
  - Validate CCP agent conditions are configured to receive scheduled callback
  - Validate reporting for scheduled callback

#### **2.4.3 Subtask: Develop and Execute Performance Test Plan**

The CONTRACTOR will develop and execute a performance test plan of the CalSAWS Customer Service Center Solution via Cyara. Cyara is an automated testing platform currently used by the CalSAWS Project to run the following functionality: places calls into the IVR; listens for messages; utilizes speech to task functionality; and compares outcomes to test cases. The CONTRACTOR will leverage automated test scripts created as a part of the automated testing effort for performance testing. Performance testing will set measurable targets for performance indicators including:

- Capacity

- AWS Lambda function execution time
- Page loading
- Throughput
- Scalability

## **2.5 TASK 5: SYSTEM TEST**

The CONTRACTOR will develop and execute system testing of SCRs for implementing requirements for the CalSAWS Customer Service Center Solution.

### **2.5.1 Subtask: Develop and Execute System Test Plan**

The CONTRACTOR will generate test plans for functionalities that require manual effort such as IVR/self-service, outbound IVR campaign, and telephonic signature.

- The system test effort for the IVR will include testing the following tasks:
  - Validate that the Inbound/Outbound Report provides the following information:
    - Date
    - Case number
    - Case name
    - Person name
    - Language
    - Worker
    - Answered/unsuccessful
    - Type
  - Validate the generation of call log screen pops on incoming calls
  - Validate the integration points for the Consortium's third-party CRM tools
- The system test effort for the outbound IVR calling campaign solution will include the following tasks:
  - Validate opt-in/opt-out functionality for Los Angeles County and the 18 CalWIN Counties

- The system test effort for the telephonic signature solution will include the following tasks:
  - Validate contact flows in Statewide instance for Telephonic Signature
  - Validate the electronic signature AWS Lambda function allows multiple documents to be returned
  - Validate the Attestation field in the CalSAWS application is populated with the transcription from the call
  - Validate recording metadata is sent to the CalSAWS System
  - Validate that an auto-journal is created in the CalSAWS application
  - Validate the webservice endpoint for auto-journaling
  - Validate tasks are created
  - Validate a worker can play a telephonic signature recording
  - Validate that the CCP includes a “Telephonic Signature” button and Capture Code field
  - Validate the Capture Code is sent to and from the CCP to start the Telephonic Signature application
  - Validate the functionality for a customer to connect to a non-customer service center worker via the CalSAWS application when the telephonic signature option is selected
  - Validate the functionality for a customer to connect to a customer service center worker via the CalSAWS application when the telephonic signature option is selected
  - Validate that a worker, a customer, the language line, and the telephonic signature line can be conferenced together on a single call concurrently for 4-way conference calling
  - Validate the Rights and Responsibilities prompts have been uploaded
  - Validate the page mapping for the Electronic Signature page within the CalSAWS System

## **2.6 TASK 6: TRAINING**

The CONTRACTOR will be responsible for developing a training plan to outline the training processes, communication methods, and timelines required to support implementation of the CalSAWS Customer Service Center solution. The CONTRACTOR will create six (6) training modules to train Los Angeles County on the functionalities of the CalSAWS Customer Service Center Solution. Additionally, the CONTRACTOR will provide training to the 39 C-IV Counties on new functionalities and tools that are beyond those of the current C-IV Customer Service Center System. The six (6) training modules will include the following:

- Customer Service Training - Execution of Customer Service Training will include up to seventy-five (75) training sessions. Each session will be up to eight (8) hours long and support up to twenty (20) County workers.
- QA Tool Training - Execution of QA Tool Training will include up to seventeen (17) training sessions. Each session will be up to eight (8) hours long and support up to ten (10) County workers.
- WFM Tool Training - Execution of WFM Tool Training will include up to seventeen (17) training sessions. Each session will consist of three (3) days of training, up to eight (8) hours per day (for a maximum of 24 hours of training for each of the 17 sessions). Each session will support up to ten (10) County workers.
- Reporting Tool Training - Execution of Reporting Tool Training will include up to seventeen (17) training sessions. Each session will be up to eight (8) hours long and support up to ten (10) County workers.
- AWS Connect Platform Training - Execution of AWS Connect Platform Training will include up to 157 training sessions. Each session will be up to eight (8) hours long and support up to twenty (20) County workers.
- Administration Training - Execution of Administration Training will include up to forty-seven (47) training sessions. Each session will be up to eight (8) hours long and support up to ten (10) County workers.



The CONTRACTOR will prepare for the six (6) above-mentioned training modules by updating ten (10) existing training presentation materials and creating up to five (5) additional presentation materials for new functionality and “work from home” processes. The CONTRACTOR will perform the following tasks regarding the preparation of training presentation materials:

- Customer Service Training:
  - Modify one (1) existing Customer Service Training presentation
  - Review materials, gather feedback, and incorporate feedback
- QA Tool Training:
  - Modify one (1) existing QA Tool Training presentation
  - Review materials, gather feedback, and incorporate feedback
- WFM Tool Training:
  - Modify one (1) existing WFM Tool Training presentation
  - Review materials, gather feedback, and incorporate feedback
- Reporting Tool Training:
  - Modify two (2) existing reporting tool training presentations
  - Review materials, gather feedback, and incorporate feedback
- AWS Platform Training, which will include the components:
  - High-level overview of AWS Connect platform:
    - Update existing content by including additional information regarding the impact of the AWS Connect deployments on the customer service centers
    - Review materials, gather feedback, and incorporate feedback
  - Features of AWS Connect platform:
    - Gather information and create content for self-service for additional features that will be deployed as part of this project
    - Review materials, gather feedback, and incorporate feedback
  - CCP overview of AWS Connect platform:
    - Review and modify existing material with updated screenshots
    - Create two (2) new handouts material and update five (5) existing “work from home” handouts.

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- Review materials, gather feedback, and incorporate feedback
  - Telephonic Signature overview of AWS Connect platform:
    - Gather information and outline training
    - Review materials and gather feedback
- Administration Training will include the following components (AWS Console, Administration Page, Call Routing, and External Party Access):
  - AWS Console portion of Administration Training includes the following tasks:
    - Gather information and outline training
    - Develop PowerPoint material
    - Review materials and gather feedback
  - Administration Page portion of Administration Training of AWS Platform Training Prep includes the following tasks:
    - Gather information and outline training
    - Develop PowerPoint material
    - Review materials, gather feedback, and incorporate feedback
  - Call Routing portion of Administration Training of AWS Platform Training Prep includes the following tasks:
    - Review, modify, and consolidate three (3) existing PowerPoint Decks
    - Review materials, gather feedback, and incorporate feedback
  - External Party Access portion of Administration Training of AWS Platform Training Prep includes the following tasks:
    - Gather information and outline training
    - Develop PowerPoint Material
    - Review materials, gather feedback, and incorporate feedback
- The CONSORTIUM will be responsible for performing peer reviews on the training materials.
- The CONTRACTOR will prepare internal and external training teams on the training materials for training modules. In order to accomplish that, the

CONTRACTOR will plan, host, and conduct Train-the-Trainer (“TTT”) sessions for the Consortium’s third-party vendor responsible for delivering training to the 18 CalWIN Counties. CONTRACTOR will provide training materials such as training guides and tips for those TTT sessions

- Provide materials such as training guides and tips for County instructors/trainers.

## **2.7 TASK 7: MODEL OFFICE**

The CONTRACTOR will develop a Model Office Plan which will include communication with the counties, timelines, and support material for the implementation of the CalSAWS Customer Service Center solution. The CONTRACTOR will be responsible for working with the counties to schedule and execute Model Office activities. The purpose of Model Office is to provide customer service agents the ability to utilize the CCP and have a mock customer service center experience. The CONTRACTOR is responsible for the following tasks for Model Office:

- Facilitating the model office sessions with the Counties
- Resolve any technical or application issues
- Provide direction and training to staff throughout the process

## **2.8 TASK 8: ENHANCED DEPLOYMENT SUPPORT**

The CONTRACTOR will provide two (2) weeks of enhanced deployment support for Los Angeles County and each of the 18 CalWIN Counties. The CONTRACTOR will perform the following tasks for enhanced deployment support:

- Provide up to one (1) resource for two (2) weeks to support, triage, and resolve issues escalated by County workers. The resource will be located on-site in Los Angeles County and the 18 CalWIN Counties’ customer service centers.

- The above-mentioned resource will work with the CalSAWS Project's Level 3 Support staff to resolve open issues related to the CalSAWS Customer Service Center Solution.
- Capture and document lessons learned from each County's go-live for use in future customer service center deployments for the CalSAWS Customer Service Center Project.

## **2.9 TASK 9: MAINTENANCE AND OPERATIONS**

### **2.9.1 Subtask: Production Operations**

Production Operations services for central support are required for maintaining and operating the CalSAWS Customer Service Center Solution for Los Angeles County and the 18 CalWIN Counties following its production deployment for the first go-live wave. Production Operations charges include support of the AWS Connect-based contact center system and management and administration of the accompanying third-party manufacturer Hardware and Software through the term of the CalSAWS Customer Service Center Project.

- Provide Level 3 support for the CalSAWS Customer Service Center Solution for Los Angeles County and the 18 CalWIN Counties:
  - Production Operations are based on supporting:
    - A maximum of 10,214 concurrent workers/agents across nineteen (19) customer service centers.
  - CONTRACTOR will provide Level 3 support for the CalSAWS Customer Service Center Solution:
    - Analyze, investigate, diagnose, and resolve tickets reported by the CalSAWS Project's Level 1 support staff
    - Work with CalSAWS Project's Level 1 support staff to coordinate the investigation and resolution of tickets
  - CONTRACTOR will perform regular maintenance tasks and upgrades for the CalSAWS Customer Service Center Solution:
    - Install and configure software updates and patches
    - Monitor production and development infrastructure

- Monitor the CalSAWS Customer Service Center Solution's application
- Support centralized and County-unique IVR call flows and minor call flow changes
- Support third-party applications for reporting, work force management, and quality assurance

**3. ATTACHMENT 1 CONTRACTOR ASSUMPTIONS**

Attachment 1 attached hereto includes CONTRACTOR assumptions associated with the delivery, maintenance, and operations of the CalSAWS Customer Service Center Solution. The CONTRACTOR's performance of the CalSAWS Customer Service Center Project, at the pricing included in Attachment 2 (CalSAWS Customer Service Center Pricing Schedule), is dependent on the assumptions in Attachment 1, this SOW, and the CalSAWS M&O Extension. In the event the assumptions are incomplete or inaccurate, the Parties will enter into an appropriate Amendment to the CalSAWS M&O Extension for such Work to address any incremental prices or timeline changes incurred by CONTRACTOR or in connection with such Work.

**4. ATTACHMENT 2 CALSAWS CUSTOMER SERVICE CENTER PRICING SCHEDULE**

Attachment 2, CalSAWS Customer Service Center Pricing Schedule, attached hereto includes the CONTRACTOR payments for the CalSAWS Customer Service Center Project. The milestone payment table in Attachment 2a (CalSAWS Customer Service Center Project – Milestones (One-time Services)) of Attachment 2 (CalSAWS Customer Service Center Pricing Schedule) outlines the payment schedule for one-time services for the design, development, and implementation of the CalSAWS Customer Service Center Solution. Ongoing Production Operations charges for maintenance and operations of the CalSAWS Customer Service Center Solution will be invoiced per the rates and schedule in Attachment 3 (CalSAWS Customer Service Center Project – Production Operations) of Attachment 2 (CalSAWS Customer Service Center Pricing Schedule).

**5. ATTACHMENT 3 CALSAWS CUSTOMER SERVICE CENTER  
FUNCTIONAL DESIGN BUSINESS PROCESS FLOWS**

Attachment 3 attached hereto, provides an outline of the estimated processes to be implemented as part of the CalSAWS Customer Service Center Project. This documentation will serve as an input into the design documentation that will address how the requirements for the CalSAWS Customer Service Center solution will be implemented.

**6. ATTACHMENT 4 CALSAWS CUSTOMER SERVICE CENTER  
SOFTWARE SPECIFICATIONS**

Attachment 4 outlined software/licensing required for the execution of the CalSAWS Customer Service Center Project and was replaced by the Amendment Thirty-One with the CalSAWS Hardware and Software list which is captured in living document "CalSAWS M&O Schedule Baseline" maintained on CalSAWS SharePoint. The budget for hardware and software required for delivering scope of this SOW are reflected in Schedule 5 of the Attachment 2 (CalSAWS M&O Pricing Schedules) to Schedule 1 (Statement of Work for CalSAWS Maintenance and Operations ("M&O") Project) to Exhibit X. Delays in making such software/licensing available will delay the delivery of the CalSAWS Customer Service Center Project and, in turn, delay the projected completion date.

**7. ATTACHMENT 5 CALSAWS CUSTOMER SERVICE CENTER  
COMPUTE RESOURCE SPECIFICATIONS**

Attachment 5 attached hereto provided a list of estimated compute resources required in the CONSORTIUM's AWS Cloud for execution of the CalSAWS Customer Service Center Project and was replaced by the Amendment Thirty-One with Compute Resource Specifications for Schedule 15 to Exhibit X (Statement of Work for CalSAWS Customer Service Center Project) that are included in Attachment 5 (CalSAWS M&O Compute Resource Specifications) to the Schedule 1 to Exhibit X (Statement of Work for CalSAWS Maintenance and Operations ("M&O") Project). As changes become necessary or refinements are developed, these will be discussed with the CONSORTIUM. As outlined in Attachment 1, Contractor Assumptions, the CONSORTIUM must make the resources identified

in Attachment 5 (CalSAWS M&O Compute Resource Specifications) to the Schedule 1 to Exhibit X (Statement of Work for CalSAWS Maintenance and Operations (“M&O”) Project) available to support the delivery of CalSAWS Customer Service Center Project. Delays in making such resources available will delay the delivery of the CalSAWS Customer Service Center Project and, in turn, push out the projected completion date for the CalSAWS Customer Service Center Project .

**8. ATTACHMENT 6 REQUIREMENTS FOR CALSAWS CUSTOMER SERVICE CENTER SOLUTION**

Attachment 6 attached hereto includes the CONSORTIUM’s requirements for the CalSAWS Customer Service Center Solution, upon which this Statement of Work and the pricing are based. If modifications to the requirements are requested, the Parties will enter into an appropriate Amendment to the CalSAWS M&O Extension for such Work to address any incremental costs prices or timeline changes incurred by CONTRACTOR or in connection with such Work.