



***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)***

***Attachment 1 - Contractor Assumptions***

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

**1. General Assumptions**

- The CalSAWS Customer Service Center Project includes a remote work solution that would provide County staff with the ability to work remotely with full functionality of the call control panel (“CCP”).
- The CalSAWS Customer Service Center Solution requires the Consortium’s CalSAWS Statewide self-service portal to be updated with URLs the CalSAWS Customer Service Center Solution’s click-to-call and click-to-chat functionality. The CONSORTIUM’s vendor will be responsible for implementing such changes to the CalSAWS Statewide self-service portal in accordance with the schedule for the CalSAWS Customer Service Center Project. Delays in implementing these URLs within the CalSAWS Statewide self-service portal will result in delays to customers receiving the ability to access the click-to-call and click-to-chat functionality via the CalSAWS Statewide self-service portal. This Schedule 15 does not include scope associated with implementing requirements necessary to support the Consortium’s CalSAWS Statewide self-service portal.
- The 58 CalSAWS Counties will be responsible for completing several tasks and milestones in order to comply with the project schedule. Examples of such tasks and milestones include, but are not limited to, the following: finalize call types; finalize IVR call flow and survey questions; deploy equipment and software for agents; finalize agent processes; complete model office script development; group workers/agents into teams; train workers on processes. CONTRACTOR will work with the Counties to confirm the schedule for County-owned tasks and milestones for the CalSAWS Customer Service Center Project.
- The QA/QM solution will record 100% of the call audio and 25% of the agent desktop screens for training and quality purposes.
  - Call recordings and screen recordings stored in the CalSAWS Customer Service Center Solution’s QA/QM tool will be configured to expire after 90 days.
  - If a County would like to keep a recording past the 90-day retention period, that County will be responsible for downloading the call and/or screen recording files via the WFM/QA/QM vendor-provided API before the

expiration period. The CONTRACTOR will provide the Counties with a script for downloading the audio files through an API end point. The CONTRACTOR assumes the Counties will have the necessary software to run the script provided.

- The CCP solution deployed for the CalSAWS Customer Service Center Project will leverage the Accenture Unified Agent Portal (“UAP”) software. Pursuant to the Master Software License Agreement dated October \_\_\_, 2020, the CONSORTIUM will be provided with a point-in-time instance of the UAP software for use for the CalSAWS Customer Service Center Solution. The CONSORTIUM must agree to the Master Software License Agreement for the UAP in order to leverage the UAP for the CalSAWS Customer Service Center Solution.
- The Consortium will be responsible for facilitating interactions with external stakeholders and other Consortium vendors that are required to enable the project schedule for the CalSAWS Customer Service Center Project. CONTRACTOR will collaborate with Consortium vendors (e.g. AWS, WFM/QA/QM vendor, contact center reporting vendor), as necessary, to implement the CalSAWS Customer Service Center Solution.
- The responsibility of aligning the CalSAWS Customer Service Center Solution’s technology capabilities to the Counties’ business processes will fully reside with the Counties. The Counties will be responsible for development of business processes, operating procedures, and performance management metrics.
- The price for this Schedule 15 does not include any additional facilities for staff who will support the CalSAWS Customer Service Center Project. If facilities are required beyond the existing capacities of the C-IV Application Development Facility in Rancho Cordova, California (the “Northern location”) or the LRS Project Management Office in Norwalk, California (the “Southern location”), then an Amendment to the CalSAWS M&O Extension would be required to add prices associated for such additional facilities.
- This Schedule 15 includes certain scope that CONTRACTOR would perform onsite at CONSORTIUM and County locations (e.g. UCD sessions, training sessions, Model Office sessions, and post go-live enhanced deployment support). In the event that

conditions do not permit CONTRACTOR, at CONTRACTOR'S sole discretion, to safely perform such scope onsite at the CONSORTIUM and County locations, CONTRACTOR will work with the CONSORTIUM and Counties to mutually determine alternative methods of performing such Work (e.g. virtual UCD sessions, training sessions, and model office sessions). For example, in the event that the COVID-19 pandemic does not adequately subside during the CalSAWS Customer Service Center Project, CONTRACTOR staff will not perform any Work onsite at CONSORTIUM and County locations.

## **2. AWS Assumptions**

- Automation of languages, dynamic menus, the Administration Page, and custom information and emergency messages is dependent upon the ability to source WAV files from Amazon S3 buckets by May 1, 2021. If Amazon does not deploy the capability to source files from Amazon S3 buckets by May 1, 2021, additional effort would be required to manually upload WAV files to the Amazon S3 buckets and result in schedule delays. An Amendment to this Schedule 15 would be required to update the scope, prices, and schedule for this Schedule 15 to support the manual upload of the WAV files.
- As of October 1, 2020, the Amazon Connect platform supports a maximum of three (3) lines per conference call (i.e. three-way conference calling). In order to utilize four-way conference calling for the telephonic signature solution, Amazon must deploy that capability by March 2021. If four-way conference calling capability is not available by March 2021, the Counties' customer service centers will not be able to conference in a fourth phone line to support a language translator (a "language line") for telephonic signature.
- Automation of IVR creation tasks such as creating queues, profiles, configuring storage, phone numbers and contact flows are subject to availability of Amazon's Connect Resource Management API that would provide the capability to manage resources in the Amazon Connect platform such as those listed above (e.g. queues, profiles, etc.). If Amazon does not deploy this API by May 1, 2021, additional effort would be required to implement automation of IVR creation tasks and result in

schedule delays. An Amendment to this Schedule 15 would be required to update the scope, prices, and schedule for this Schedule 15.

- The CONSORTIUM will provide AWS compute resources and/or services for the CalSAWS Customer Service Center Project. CONTRACTOR's price for the CalSAWS Customer Service Center Project does not include such resources, nor services. The CONSORTIUM will be fully responsible for making such resources and services available for supporting the CalSAWS Customer Service Center Project, including the procurement and payment for such services from AWS. Because the CONSORTIUM's AWS Cloud account (and the CONSORTIUM's agreement with CDT for AWS) will be leveraged for the Project, it is assumed that such charges will be invoiced to the CONSORTIUM by CDT. As the CalSAWS Customer Service Center Project's requirements for AWS Cloud computing resources may change through the term of the project, the CONSORTIUM should include additional amounts in its annual project budget (the Implementation Advance Planning Document or "IAPDU") to account for planned changes to the requirements for the CalSAWS Customer Service Center Project's AWS Cloud computing resources.
- Amazon Web Services ("AWS") and the California Department of Technology ("CDT") will provide ability for Accenture to use AWS organizations to support the CalSAWS Customer Service Center Project.
- CDT is not a party to the CalSAWS M&O Extension but is providing services on behalf of the CONSORTIUM critical to the success of the CalSAWS Customer Service Center Project. It is the CONSORTIUM's responsibility to resolve issues related to CDT and/or the AWS Cloud to enable delivery of the CalSAWS Customer Service Center Project.
- AWS, CDT, and JHC Technology (the reseller CDT is using) will not disable services or take other actions/inactions that would prevent CONTRACTOR from delivering the CalSAWS Customer Service Center Project.
- **The compute resources outlined in Attachment 5** (CalSAWS Customer Service Center Compute Resource Specifications) for the period of February 2021 through April 2024 is based on information known by the CONTRACTOR as of October 1,

2020 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 the Work for this SOW progresses, the CONTRACTOR may identify additional compute resources or services (including AWS services) that are required for the CalSAWS Customer Service Center Project. In the event CONTRACTOR identifies additional compute resources or services required for delivering the CalSAWS Customer Service Center Project, CONTRACTOR will so advise the CONSORTIUM of such additional compute resources or services. The CONSORTIUM is responsible for making such resources available to the CONTRACTOR to support the delivery of the CalSAWS Customer Service Center Project, including the procurement and funding of resources. Delays in making such resources available will delay the delivery of Work and, in turn, push out the projected completion date. For compute resources and/or services required for delivering the CalSAWS Customer Service Center Project during the period of May 2024 through April 2025, CONTRACTOR and CONSORTIUM will jointly develop an estimate of such resources/services to support the CONSORTIUM’s annual IAPDU update.

- The price for the CalSAWS Customer Service Center Project excludes Software and Software Support. It is assumed that Software and Software Support required for the CalSAWS Customer Service Center Project will be purchased by the CONSORTIUM from CONTRACTOR’s affiliate, Proquire, LLC (“Proquire”).
- The CONSORTIUM will own or have right to use Software outright without any leasing/financing required.
- Attachment 4 (CalSAWS Customer Service Center Software Specifications) was based on information known by the CONTRACTOR as of April 1, 2022 and was replaced by the Amendment Thirty-One with the detailed CalSAWS Hardware and Software list which is captured in the living document "CalSAWS M&O Schedule Baseline" maintained on the CalSAWS SharePoint. As the Work for this SOW progresses, the CONTRACTOR may identify additional Software/licensing that is

required for the CalSAWS Customer Service Center Project. In the event that a change to the specifications is required – whether the change is planned (e.g. requested by the CONSORTIUM) or unplanned – to support the delivery of the CalSAWS Customer Service Center Project, including the procurement and funding of those Software/licensing items. As the CalSAWS Customer Service Center Project’s requirements for Software/licensing may change through the term of the CalSAWS Customer Service Center Project, the CONSORTIUM should include additional amounts in its annual project budget (the IAPDU) to account for planned changes to the requirements.

- The CONTRACTOR will create security profiles and assign security rights for County supervisors to access the Amazon Connect Console.
- Data exchanged with Amazon Connect is protected in transit between the user’s web browser and Amazon Connect using industry-standard TLS encryption implemented by Amazon in its Amazon Connect platform

### **3. Design Assumptions**

- The Consortium’s vendor for the CalSAWS Statewide self-service portal will be responsible for providing all documentation and information for the Statewide Portal in order to complete design documentation for the CalSAWS Customer Service Center Project. Delays in providing the required documentation and/or information may result in delays to the CalSAWS Customer Service Center Project’s deployment schedule and require additional CONTRACTOR services to deliver the project. Any changes to the prices, schedule, and scope would require an Amendment to this Schedule 15.
- The CONTRACTOR will conduct user centered design (“UCD”) sessions to design the user interface for the following areas:
  - CCP
  - Administration Page
- The CONTRACTOR will work with the CONSORTIUM to identify candidate groups that will participate in each UCD activity session, schedule the UCD design sessions, and collect input which will be utilized to create the designs for the CCP and Administration Page.

- The Consortium will be responsible for identifying the users or County staff who will participate in the UCD sessions.
- The CONTRACTOR will conduct up to six (6) UCD sessions for each of the two areas that will be designed (e.g. CCP and Administration Page), and each UCD sessions will support up to fifteen (15) participants per session .

#### **4. Build Assumptions**

- Regarding automation, the estimate for the CalSAWS Customer Service Center Solution’s build effort is based on the automation of the following services:
  - AWS Lambda
  - Amazon DynamoDB
  - Amazon SQS
  - Amazon Kinesis
  - Amazon EventBridge
  - Amazon SNS
  - Amazon S3
  - AWS CloudTrail
  - Amazon SES
  - Amazon Connect
  - AWS Step Functions
  - AWS Account Alias
  - Amazon API Gateway
- CONTRACTOR’s Global Delivery Network (“GDN”) will perform certain build-related tasks for the CalSAWS Customer Service Center Solution’s Amazon Connect platform. Tasks that will be performed by the GDN include, but are not limited to the following:
  - Deploy and configure Amazon Connect instances
  - Create and execute CloudFormation templates
  - Build AWS Lambdas
  - Setup and configure Amazon DynamoDB
  - Update County call flow changes within Amazon Connect
  - Build automation for deploying AWS services



- Update the CCP to include additional functionality
- Build distribution code for the CCP
- Customer Service Center/IVR
  - Because AWS Polly (Amazon Connect’s text-to-speech solution) does not support the languages of Vietnamese, Cantonese, Farsi, Armenian, Tagalog, Cambodian, Hmong, and Lao, manual stitching will be required to create dynamic prompts for those languages. As an example, for the following prompt where the Dynamic Value is 1,054, three WAV files would be concatenated to allow the solution to play the Dynamic Value. The first, second, and third WAV files would play “one thousand”, “fifty,” and “four,” respectively.

“Your benefit balance is {Dynamic Value} dollars”
  - The CONTRACTOR will not import or migrate any existing data for Los Angeles County and the 18 CalWIN Counties’ solutions into CalSAWS Customer Service Center Solution. This includes but is not limited to: workforce management data, contact center/customer service center data, and County reporting/data warehouse data.
  - Call flow customization will be limited for Counties that opt out of the CalSAWS Customer Service Center Solution. Counties that opt out of the solution would be able to port their TFN numbers over to the CalSAWS Customer Service Center Solution or leverage a new phone number provided by the CalSAWS Project.
  - Counties will be responsible for creating work conditions during WFM Training, which include scheduling and agent work hours. Furthermore, Los Angeles County and the 18 CalWIN Counties will be responsible for creating work conditions for service levels, holiday dates, vacation planning, and team updates, as appropriate.
  - The Consortium’s vendor for the QA/QM tool, will provide a template that will be utilized to deploy all AWS resources required to support the QA/QM solution. The purpose of this template is to import the WFM/QA/QM real-

time and historical data from Amazon Connect to the WFM/QA/QM solution. Without that template, reporting data for the CalSAWS Customer Service Center Solution will not be available.

- The point of presence (“PoP”) Counties will be responsible for configuring and installing all necessary hardware and software to utilize the CalSAWS Customer Service Center Solution.
- The CONTRACTOR shall provide the ability for each County to pull their Contact Trace Records (“CTR”) data out of the CalSAWS System. The Counties will be responsible for running the script. In order to download CTR data, the County must configure the County-owned workstation prior to running the client-side API. Code will be provided in a template, and the user will be able to set a username and password / API token in the configuration file.
- Los Angeles County and the 18 CalWIN Counties will choose a maximum of five (5) questions per County for post-call survey (for those Counties that have opted into the Post Call Survey solution).
- The CONTRACTOR will leverage the security rights that will be deployed into the CalSAWS System as part of the effort to port the C-IV Customer Service Center Solution to the CalSAWS System. The link to the CCP application will use existing CCP security rights.
- The CONTRACTOR will leverage existing IVR web services and AWS Lambda functions for self-service functionality. This Schedule 15 does not include scope associated with modifying the following existing webservices with the Amazon Connect solution:
  - cancelAppointmentWebService
  - caseLookupWebService
  - changePINWebService
  - confirmAppointmentWebService
  - deleteVoiceprintWebService
  - generateFormWebService
  - getAppointmentInfoWebService

- getAppointmentsWebService
- getCalFreshProgramInfoWebService
- getCalWORKsProgramInfoWebService
- getCalWorksWorkerPhoneInfoWebService
- getDistrictOfficeWebService
- getDocumentInfoWebService
- getEBTPersonFromCaseByDOBWebService
- getMedicalProgramInfoWebService
- getSentFormsInfoWebService
- getWTWProgramInfoWebService
- loginWebService
- loginWebServiceSB
- loginWithSSNAndDOBWebService
- orderReplacementEBTWebService
- outboundResendFormWebService
- personLookupWebService
- predictReasonsToCallWebService
- requestPINWebService
- rescheduleAppointmentWebService
- resendFormWebService
- sendTextMessage
- setAppointmentReminderCompleteWebService
- setDocumentReminderCompleteWebService
- updateBvpInfoWebService
- updateCallerResponseForPredictionWebService
- updateIVRExitReasonForCallWebService
- validateIVRESignatureWebService
- validCaseCheck

- The CONTRACTOR shall configure each zip code used for County office hours to have a maximum of two (2) addresses: one address for cash assistance and the second address for medical assistance.
- The CONTRACTOR will leverage automation to build the customer service center configurations, such as routing profiles and queues. The CONTRACTOR will customize each unique County contact flow with the respective County. The automation build creates default configurations for queues and Counties will be responsible for making any customizations for routing profiles and queues.
- The maximum queue limit will be fifty (50) queues per County.
- Standard queue updates will typically require two (2) weeks for development and deployment, from the time that a County provides the final requirements for the requested queue update.
- CONTRACTOR will work with Counties during the design phase to outline the CalSAWS Project's process to implement minor call flow changes requested by the Counties. A "minor" call flow change is a change that does not exceed (10) verbiage changes or include the rearrangement of more than three (3) menu options. The addition of new queues or new self-service options are not in scope.
- **Environments Assumptions**
  - The CONTRACTOR will configure QA/QM for two (2) instances in the test environment. The purpose of these instances is to test and configure QA/QM requirements prior to deployment.
  - The CONTRACTOR will only configure up to ten (10) users in the test environment for the WFM tool. The purpose of configuring some users is to test WFM tool requirements prior to roll out.
  - The CONTRACTOR will configure reporting tool for two (2) instances in the test environment. The purpose of configuring these two (2) instances of the reporting tool is to test and configure reporting prior to roll out.
  - The CONTRACTOR will leverage the existing sandbox account and configuration to host the two (2) new assembly test environments. This

Schedule 15 does not include scope for creating a new account and configuration for these services.

- The CONTRACTOR will leverage the existing development account to host the four (4) new System Test environments. This Schedule 15 does not include scope for creating and configuring a new account for supporting these System Test environments.
- The CONTRACTOR will leverage the existing the "contactcenter-production" account for the RCC/IVR deployment. This Schedule 15 does not include scope for creating and configuring a new account for supporting the RCC/IVR deployment.
- Languages Assumptions
  - With regard to the voice biometrics/authentication solution:
    - The predefined English passphrase that will be used for the voice authentication solution is “my voice is my password, please verify me.”
    - Customers that call a County’s IVR System will be prompted with an option to record their voice saying the predefined passphrase. If the customer opts into the voice authentication functionality, the system will record the customer’s statement of that passphrase. Once the system has recorded the customer’s passphrase, the customer will be prompted to authenticate by stating that same predefined passphrase each subsequent time that customer calls the IVR.
    - In order to configure and deploy the Nuance-based voice biometrics solution for the following languages, the Counties will be responsible for providing 300 speakers (150 male speakers and 150 female speakers) to create a Nuance Background Model for each of the thirteen (13) languages listed below. Each speaker will need to record a total of six (6) sessions – three (3) sessions per day for two (2) days - for each of the following languages:
      - Farsi
      - Vietnamese

- Mandarin
  - Armenian
  - Tagalog
  - Russian
  - Korean
  - Cambodian
  - Hmong
  - Cantonese
  - Arabic
  - Lao
  - Portuguese
- The C-IV Customer Service Center Solution's existing Nuance Background Models for English and Spanish will be leveraged for the CalSAWS Customer Service Center Solution.
- The IVR, voice biometrics, and Post Call Survey solutions will support the following fifteen (15) languages:
  - English
  - Spanish
  - Farsi
  - Vietnamese
  - Mandarin
  - Armenian
  - Tagalog
  - Russian
  - Korean
  - Cambodian
  - Hmong
  - Cantonese
  - Arabic
  - Lao
  - Portuguese

- The CONTRACTOR shall provide voice biometrics reporting on an ad-hoc basis.
- Translations related to the Customer Service Center Solution will be approved by the Consortium.
- In the event of a language discrepancy between the provided translations and the input provided by the Consortium's voice talent vendor, the CONSORTIUM will resolve the discrepancy.
- Schedule 15 does not include scope associated with implementing languages beyond the above-mentioned fifteen (15) languages.
- Administration Page Assumptions
  - The Administration Page will support one (1) level of security permissions.
  - The CONTRACTOR assumes the actions performed via the Administration Page can be directly done by the County without involvement from the CalSAWS Project.
  - A County will not be able to add agents beyond that County's WFM/QA/QM and reporting tools' licensing limits. Each agent will require one named user license for each tool used for the CalSAWS Customer Service Center Solution.
  - For Administration Page functionality, there will be a 1-minute cool down period between changes for the same feature (i.e. if a County worker changes a queue's limit, that worker must wait at least one (1) minute before changing the limit for the same queue).
  - When a customer service center is closed using the Emergency Closure functionality, that customer service center must be re-opened using this Administration Page feature, calling the emergency closure phone number, or by contacting CalSAWS help desk.
  - Custom queue hold messages, emergency messages, and informational messages will be played through text-to-speech technology, not professional voice talent. AWS Polly – AWS Connect's text-to-speech technology – supports the following languages:
    - English

- Spanish
- Mandarin
- Russian
- Korean
- Arabic
- Portuguese

For languages that are not supported by Amazon Polly, Counties may record their own message with County-provided translators for that message to be used as a queue hold message, emergency message, or informational message.

- Queue hold messages, emergency messages, and informational messages will have a 260-word limit, which is approximately 120 seconds of audio.
- For queue hold messages, emergency messages, and informational messages there will be a maximum of ten (10) messages to be saved and played.
- Up to 60 seconds of queue music will be played between each queue message. The duration of the queue music will be determined during the design phase of this project.
- For the ‘Roll On/Off’ or ‘Update Agent’ functionality, the County will not be able to add a new agent if doing so would exceed the licensing limit for the County
- For a County eligibility worker that is already rolled on to the CalSAWS application, the ‘Roll On/Off’ or ‘Update Agent’ feature is for rolling that worker on as a customer service center agent. The ‘Roll On/Off’ or ‘Update Agent’ functionality will roll agents onto AWS Connect, WFM, QA/QM, and the Customer Service Center’s reporting system.
- An existing County worker/agent’s username/account name cannot be changed as it models the CalSAWS System’s account. In order to associate a worker/agent with a different username/account name, the County must first roll off that County worker/agent and then roll on the same agent/worker with a new username/account name.
- For emergency messages and informational messages, only one (1) message can be played to a customer at any given time.



- When an emergency message is changed or selected using the Emergency Message feature, the change will persist unless changed again.
- For the Create/Delete Team functionality, there will be a maximum of 250 teams a County can have at one time. When a team is deleted, users who were in that team are then disassociated from the deleted team.
- Supervisor email notifications will be an optional self-service feature for Counties that would like to set notifications.
  - The email notifications would be sent to all email addresses entered to receive the notification.
  - The email will support plain text only.
  - There will be no queueing of emails.
- SAML 2.0 based authentication will be leveraged for identity management of the Administration Page.
- After Call Work will support up to 7,200 seconds.
- Outbound IVR Campaign Assumptions
  - One (1) outbound account will be provided per each of the six (6) CalSAWS governance regions due to API call limitations.
  - Existing outbound campaign prompts from the C-IV Customer Service Center Solution will not be modified. These existing prompts will be used across all Counties for the CalSAWS Customer Service Center's outbound IVR call campaigns.
  - Appointment reschedule calls will be configured to appear as "Unauthenticated" when the call is transferred to an agent.
  - For outbound call reminders, the system assumes it the call connection was successful if it reaches voicemail.
  - For document reminders, the document sent to the customer will be the document the customer initially received and is past due.
  - The outbound IVR solution can only display phone numbers (i.e. caller ID) that are part of the CalSAWS Amazon Connect account. In order for the solution to display a County's phone number, a County can port its toll-free

phone number over to CalSAWS Amazon Connect or leverage a new phone number provided by the CalSAWS Project.

- The task that is created when a customer cancels an appointment will be managed through the CalSAWS System.
- For Counties that opt out of the CalSAWS RCC solution, the inbound IVR solution will transfer Medi-Cal referral calls from Covered California's customer service center to an external number.
- **Telephonic Signature Assumptions**
  - The Telephonic Signature solution will leverage the electronic signature solution that will be implemented for the CalSAWS System as part of the CalSAWS Design, Development, and Implementation ("DD&I") Project.
  - County workers who work outside of a customer service center location are required to have access to a phone with conference call capability in order to use the Telephonic Signature functionality.
  - The County workers located outside of a customer service center location will require access to a desk phone that supports 4-way conference calling for a telephonic signature call to support a language line. Additionally, County workers must have the appropriate hardware and software in order to access and listen to voice recordings for Telephonic Signature.
  - The verbal confirmation from the customer for telephonic signature will be standardized across all Counties for data analysis purposes.
  - The telephonic signature solution will support a recording of a customer's verbal attestation of up to 60 seconds in length.
  - Within the CalSAWS System, County workers will have the ability to modify the Attestation field and metadata fields.
  - The threshold for the quality standards of the transcribed attestation for telephonic signature will be determined during the detailed design phase.
  - Telephonic Signature attestation transcriptions will be supported in English and Spanish only. Counties will need to manually enter the transcription for all other languages.
- **External Party Access Assumptions**

- The CONTRACTOR assumes one (1) global call flow will be shared across all Counties for the External Party Access IVR solution that will transfer calls to the appropriate County instance. The scope of Schedule 15 does not include scope associated with implementing County-specific customizations for External Party Access.
- Voice talent WAV files will be used for the External Party Access solution.
- The External Party Access solution will provide the Counties with the ability to create new PINs, update existing PINs, or delete existing PINs for would be used by external parties for identification and authentication purposes. The Non-Case Person PINs for external parties will only be available on the Authorized Representative Detail page.
- The External Party Access solution will only support the English language only.
- **Scheduled Callback Assumptions**
  - Scheduled call backs will occur on the next County business day.
  - Time slots for scheduled callbacks will be standardized across all Counties.
  - A County will have a maximum of eight (8) time slots for scheduled callback.
  - There will be one (1) queue per supported language for the Scheduled Callback solution.
- **CRM API Assumptions**
  - Los Angeles County's customer service center will be updated to utilize the CalSAWS APIs. The existing customer service center/Lagan services will no longer be utilized or available.
  - The CONTRACTOR will update CalSAWS APIs to support the CRM solution for Los Angeles County's customer service center.
  - The updated APIs for Los Angeles County's CRM solution may be leveraged for use by other Counties. Schedule 15 does not include scope associated with updating and implementing those APIs for use by Counties other than Los Angeles County.
  - Schedule 15 does not include scope associated with modifying the EBT API and Journal API for Los Angeles County's customer service center. The

Journal API will include the date, type, category, short description, and long description.

- Since the CalSAWS APIs will be utilized by other external partners, additional data elements may be included in the response that will need to be filtered by the API consumer. The fields in the API response message will not be customized for each API consumer.
- Journal records may exceed ten (10) based on pagination framework for the Journal API.
- Search notices of action (“NOAs”) will utilize the Documents API. When searching for NOAs, there is no scan date for NOAs.
- The CalSAWS file service API would be used to view documents from the CalSAWS System.
- When viewing imaged records/forms, the person name and CIN will only be available for person-level forms.
- For imaging records, “folder type” will not be a data element in the CalSAWS System’s imaging solution. Additionally, the imaging URL will not be to a link to a specific form. It will be linked to a location in the imaging solution that will provide access to the form.
- This Schedule 15 does not include scope associated with enabling single sign-on between the CRM solution (Salesforce) and any CalSAWS applications (including imaging).
- Los Angeles County will use internet facing end points to access the APIs.
- New automated regression scripts will be developed for the file service API. These automated scripts will be limited to validating that the file is transferred and that the file name is correct. The content of the file will not be validated.
- The current functionality to send an outbound message to close a ticket when a task is closed will be removed. With the implementation of CalSAWS APIs for the existing CRM solution, the new customer service center/Salesforce implementation will retrieve task status using the task API.
- The estimated effort for designing, developing, testing, and implementing the updates to the APIs is based on the information provided via CalSAWS

Enhancement Request (“CER”) CA-219144. After the requirements for the requested API updates have been finalized, CONTRACTOR will reevaluate the required effort and work with the CONSORTIUM to determine the mutually agreed upon release date(s) for the related SCR (CA-219333) in State Fiscal Year 2021/2022 for the deployment of the above-mentioned updated APIs for the CRM solution. An amendment to this Schedule 15 may be required to incorporate additional scope and prices depending on the final set of requirements for the API updates.

**5. Automated Test Assumptions**

- The CONTRACTOR will use the CalSAWS Project’s existing automation tools to execute automated testing of the following functionalities:
  - IVR/Self-Service
  - Outbound IVR Campaign
  - External Party Access
  - Scheduled Callback
- Functionalities that will undergo automated testing will not be included in the manual testing effort.

**6. Training Assumptions**

- The training activities and scope for Schedule 15 are based on information known as known as of October 1, 2020. In the event that the Los Angeles County and the 39 C-IV Counties require different quantities of agents for their customer service centers for the deployment of the CalSAWS Customer Service Center Solution, the CONTRACTOR will work with the Consortium to assess whether any changes to the training activities and scope are required. Any requests to modify the scope of training activities will require re-evaluation and a possible Amendment to this Schedule 15 to incorporate the requested scope, price, and schedule changes.
- The 58 Counties will be responsible for providing ongoing training for County customer service center agents. This Schedule 15 does not include scope with delivering training following the one-time training effort for the 39 C-IV Counties and Los Angeles County.

- Customer Service training is required for agents and supervisors of Los Angeles County and will support up to a cumulative total of 1,498 Los Angeles County staff.
- QA training, WFM training, and reporting tool training are required for Los Angeles County supervisors/ managers only and will support up to a cumulative total of 163 supervisors/ managers per each type of training.
- AWS Platform training is required for agents and supervisors of the 39 C-IV Counties and Los Angeles County and will support a cumulative total of 4,622 staff across the 40 Counties.
- Administration Training is required for supervisors and managers of the 39 C-IV Counties and Los Angeles County, and will support up to a cumulative total of 463 supervisors/managers across the 40 Counties.
- Regarding training for the 18 CalWIN Counties:
  - This Schedule 15 does not include any scope associated with delivering training to workers of the 18 CalWIN Counties. CONTRACTOR will plan, host and conduct Train-the-Trainer (“TTT”) sessions that will be attended by the Consortium’s training vendor. To enable successful deployments of the CalSAWS Customer Service Center Solution for the 18 CalWIN Counties, the CONSORTIUM’s training vendor will be responsible for fully delivering training for the following six (6) functional modules to the 18 CalWIN Counties:
    - Customer Service Training
    - QA Training
    - WFM Training
    - Reporting Training
    - AWS Connect Platform Training
    - Administration Training
  - Furthermore, the Consortium’s training vendor must deliver the above-mentioned training modules per the following specifications:
    - Customer Service training and AWS Platform training is required for agents and supervisors of the 18 CalWIN Counties and will support up to a cumulative total of 3,765 CalWIN County staff.

- QA training, WFM training, reporting and Administration Training are required for supervisors/managers only and will support up to a cumulative total of 760 supervisors/managers per each type of training.
- CONTRACTOR will conduct TTT sessions for the six (6) above mentioned training modules, up to a cumulative total of 128 hours across those TTT sessions.
- CONTRACTOR will conduct TTT sessions relating to model office, up to a cumulative total of 140 hours across those TTT sessions.
- CONTRACTOR will provide up to 32 hours of support for addressing questions related to the training modules for the CalWIN Counties, following the initial delivery of the TTT sessions. Support beyond the 32 estimated hours may require an Amendment to this Schedule 15.
- Accenture is not a party to the agreement between the Consortium and its training vendor contracted to deliver training for the 18 CalWIN Counties. The Consortium is fully responsible for managing the training vendor and enabling the complete and timely delivery of the above-mentioned training to the 18 CalWIN Counties in order to enable the delivery of the CalSAWS Customer Service Center Project, in accordance with the project schedule. Delays in fully delivering the training modules to the 18 CalWIN Counties per the project schedule and the above-mentioned specifications will result in delays to deploying the CalSAWS Customer Service Center Solution and may require additional CONTRACTOR services to deliver the project. Any changes to the prices, schedule, and scope would require an Amendment to this Schedule 15.

## **7. Model Office Assumptions**

- The CONTRACTOR will assist Counties with Model Office through the following:
  - Development of customer interaction inventory
  - Test environment preparation for testing model office interaction scenarios
  - Facilitation of execution of up to twelve (12) Model Office test scenarios

- The Counties will be responsible for provisioning the following which are required for Model Office:
  - Computers, headsets, and microphones for Model Office participants (of models and specifications specified by the Consortium/CalSAWS Project)
  - Wi-fi/internet connectivity
  - Connectivity to the CalSAWS network
  - Model Office business case scripts for agents
  - Facilities for Model Office sessions
- The Counties will be responsible for developing material for these Model Office sessions based on their business processes.
- UAT is not included in the scope of this project. Model Office will serve as an opportunity for County workers to use the CalSAWS Customer Service Center application.
- Change management activities are not included in the scope of this Schedule 15. The County will be responsible for development and delivery of Agent, Supervisor, and Business Process Training, change management and communication in support of the CalSAWS Customer Service Center Solution deployment.
- Regarding Model Office testing for the 58 Counties, each Model Office session will support up to twenty (20) agents. CONTRACTOR will conduct up to a maximum of 355 Model Office sessions across the 58 Counties. The Counties will be responsible for providing the facilities required to support the Model Office sessions, including but not limited to furniture, equipment (e.g. computers, headsets, and microphones), software, internet connectivity, connectivity to the CalSAWS network.
- The Counties will provide resources/staff required to execute the Model Office Test scenarios and plans. It is assumed that at least two (2) dedicated representatives from each of the Counties will be fully engaged to execute each Model Office scenario.
- Model Office testing will leverage the C-IV Customer Service Center Solution's production instance of Amazon Connect, call routing, QA/QM, WFM, and reporting environments with application integration (computer telephony integration or "CTI") screen pops integrated with the C-IV PRT application environment. Data preparation



and maintenance will not be required within the C-IV PRT environment to support Model Office efforts.

- Business process changes as a result of Model Office testing will not alter the technology deployment schedule for the CalSAWS Customer Service Center Project. Modifications to business processes post Model Office testing will be reviewed and may require an amendment to this Schedule 15 to incorporate additional scope, prices, and schedule changes. Changes would be developed and implemented following the completion of the technology deployment. Any technology defects (where the solution built conflicts with the design) found during Model Office will be logged/shared in the templates used for the Model Office script testing and addressed using the standard project protocols.
- The reporting, quality monitoring, and workforce management solutions for the Customer Service Center are used by County Customer Service Center management and operations personnel to administer the customer service center. Contractor will set up accounts for reporting, quality monitoring, and workforce management for County customer service center management and operations personnel. CONTRACTOR will also assist those personnel in their initial setup and use of those tools. This will generally occur during Model Office and post go-live enhanced support periods.

## **8. Network Assumptions**

- Los Angeles County and the 18 CalWIN Counties will continue to leverage their Point of Presence (“PoP”) network model for the CalSAWS customer service centers.
- To utilize the CalSAWS Customer Service Center Solution and enable a customer service center’s connectivity to the CalSAWS network, CTI, and routing calls to the IVR, each PoP County will be responsible for establishing data connectivity between the PoP site and the County’s customer service center site. Additionally, the PoP Counties will be responsible for implementing the infrastructure required to support their customer service centers, including but not limited to: conducting network bandwidth assessments and maintain quality of real-time voice communications; implementing and provisioning network infrastructure and connectivity; procurement, installation, and configuration of infrastructure equipment.

- The backhaul of Amazon Connect traffic over the CalSAWS network required routing changes that if configured, the Counties' Amazon Connect traffic (not just CalSAWS) would traverse the CalSAWS WAN.
- The PoP Counties will be responsible for all procurement, deployment and configuration of all local equipment and software required for utilizing the customer service center technology. Additionally, the PoP Counties will be responsible for network and desktop changes required to support the deployment of the CalSAWS Customer Service Center technology.

**9. Enhanced Deployment Assumptions**

- This Schedule 15 does not include scope associated with enhanced deployment support for the 39 C-IV Counties.

**10. Hardware and Software Assumptions**

- This Schedule 15 does not include scope associated with the purchase, installation nor set up of any local equipment and software required to support the Counties' customer service centers. The Counties will be responsible for the provisioning and installation of such equipment and software for their customer service centers.
- The following are the minimum system requirements for County workstations using the CCP. In order for CCP functionality to work, the Counties' workstations must meet the following requirements:
  - Browser: Amazon Connect and the CalSAWS application will only support certain web browsers. In order for the Counties to leverage the CCP's screen-pop functionality (which opens a browser with the CalSAWS application), the Counties must deploy a browser that is commonly supported by both Amazon Connect and the CalSAWS application.
  - Network: At least 100 Kbps bandwidth per connected workstation
  - Memory: At least 2 GB RAM
  - Processor (CPU): At least 2 GHz
- PoP Counties are responsible for the following:
  - Installation of a version of a browser that is commonly supported between the CalSAWS application and Amazon Connect

- Installation of the screen agent in order to utilize screen recording capabilities of the QA/QM solution.
- Grant access to the following applications on all County customer service center workstations:
  - Webchat
  - Amazon Connect Console
  - QA/QM/WFM tool URL
  - Reporting tool URL
  - .signin.aws.amazon.com
  - .console.aws.amazon.com
  - .awsapps.com
  - .cloudfront.net
- The Counties will be responsible for adding the following URLs as browser shortcuts in order to meet the application requirements:
  - Reporting tool URL
  - QA/QM/WFM tool URL
  - CalSAWS application URL
  - Call Log URL
  - CCP URL
- The Counties will be responsible for setup of their customer service center facilities including, but not limited to: furniture, electricity, HVAC, and data/electrical cabling.

## **11. Maintenance and Operations Assumptions**

- Monthly recurring Production Operations are based on supporting a maximum of 6,049 concurrent workers/agents across nineteen (19) customer service centers for Los Angeles County and the 18 CalWIN Counties. Any requests to support additional agents beyond the 6,049 concurrent workers/agents will require a re-evaluation and possible Amendment to this Schedule 15 to incorporate the required scope and price changes required to support those additional agents.
- The following CalSAWS Performance Requirements set forth in Schedule 7 (Statement of Requirements) to Exhibit X will apply to the CalSAWS Customer

Service Center Solution's CCP, as determined by Consortium's CalSAWS CSC Requirements, once it has been ported/deployed into the production LRS System/CalSAWS System:

- Daily Peak Usage Hours Availability (Performance Requirement #5)
- Daily Prime Business Hours Availability (Performance Requirement #6)
- Monthly Deficiency Notification Response Time (Performance Requirement #3)
- Monthly Helpdesk Call Back Response Time (Performance Requirement #4)
- Certain Security Management Performance Requirements (Performance Requirement #17, Performance Requirement #18, Performance Requirement #19)

CalSAWS Performance Requirements other than those listed above will not apply to the customer service center solution. CalSAWS Performance Requirements for the core CalSAWS application will continue to apply to functionality that is deployed to the CalSAWS application under the scope of Schedule 15.

The collection, analysis, and reporting of performance requirements for the CalSAWS Customer Service Center Solution will follow the processes documented in the Performance Management Plan of the CalSAWS Maintenance and Operations (M&O) Services Plan Deliverable.