



# PROJECT APPROACH AND COST (PAC)

## 62693 - SDG TURN OFF "HAVE A COUNTY REPRESENTATIVE CALL" IN MYBCW COUNTY DIRECT AGREEMENT

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### Statement of Confidentiality

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## 1 SCOPE OF WORK

The following document outlines the County Direct Agreement between San Diego County and Gainwell Technologies, as provided under the Separate Services and Products provision (Section 13) in the CalWIN Contract.

## 2 PROJECT RESOURCES FRAMEWORK

Throughout the lifecycle of this project, several County and Vendor resources will be utilized. Precise titles are not as important here as understanding the level of involvement and roles that are necessary to maximize the effectiveness of the defined project methodology and approach. It would be possible for one person to be involved with multiple roles.

### 2.1 VENDOR ROLES

|   |  |
|---|--|
| <b>Vendor Program Managers</b>          | Contractual and executive management representative for Gainwell |
| <b>Vendor Project Manager</b>           | Delivery oversight and the focal point to the County             |
| <b>Vendor Order Tracking Manager</b>    | Individual responsible for order placement and tracking          |
| <b>Vendor Lead Architect</b>            | Technical leadership of the project team                         |
| <b>Vendor Engineers and Consultants</b> | Lead technologists, subject matter experts, project workforce    |

### 2.2 COUNTY ROLES

|                               |  |
|-------------------------------|--|
| <b>County Project Sponsor</b> | Management representative for the County and designated project acceptor   |
| <b>County Project Liaison</b> | Project focal point for all Vendor resources   |
| <b>County Site Manager(s)</b> | Contact individual for each site. Assists with scheduling and site surveys. Familiar with site layout, workgroups, and able to obtain necessary technical/logistical information from groups within the County |

## 2.3 WCDS ROLES

|  |  |
|--|--|
| <b>WCDS Administrative Deputy Director</b> | Management representative for the County Direct requests |
| <b>WCDS Project Liaison</b>                | Project focal point for all WCDS communications          |

## PROJECT DELIVERABLE CHANGE LOG

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The Project Deliverable Change Log is used to reflect changes to this project deliverable throughout the deliverable management lifecycle.

| Version | Brief Description of Change                     | Date<br>(mm/dd/yyyy) | Author/ Contributor/<br>Reviewer |
|---------|---|----------------------|----------------------------------|
| 0.1.0   | Document Creation                               | 08/18/2022           | Dan Schirtzinger                 |
| 0.1.1   | Updated for System Test                         | 08/31/2022           | Venkatraghavan Chandran          |
| 0.1.2   | Updated Financials and sent for Internal Review | 08/31/2022           | Ingrid Mock                      |

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### 3 EXECUTIVE SUMMARY

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The Project Approach and Cost (PAC) combines the elements of the Definitions Document (DD) and Cost Feasibility Study (CFS). This document has been developed to define the project approach and incorporate the appropriate elements of cost. It includes the following major components:

- Scope including identified business requirements
- Cost (Price)
- Assumptions, Risks, Constraints
- Benefits
- Workarounds
- Alternatives, if applicable
- Critical Success Factors
- Training
- Quality Assurance Checklist
- Requirements Traceability Matrix
- Type of Change – Minimal Governance

Currently, a customer has the option to Have a County Representative Call them through their MyBCW portal. When the customer sends this request it triggers an e-mail. San Diego would like to know if this is something we can turn off in MyBCW. The customer will still have the “Contacts” tab to see our Call Center number.

## 4 PROJECT APPROACH AND SCOPE OF CHANGE

This section provides detailed information regarding the nature of the change, project outcomes, business drivers and other relevant information as defined in the following sections.

### 4.1 PROJECT STAKEHOLDERS

| Role  | Name        |
|---|-------------|
| Executive Sponsor   | Ingrid Mock |
| Deputy Director   | Ingrid Mock |
| Product Owner   | Ingrid Mock |
| Project Manager   | Ahmad Ilyas |
| SMEs  | Cori Evans  |
| Project Management Office<br><i>For projects with cloud related changes</i> | N/A         |

### 4.2 BUSINESS PROBLEM OR BUSINESS DRIVERS

Currently, a customer has the option to “Have a County Representative Call” them through their MyBCW portal. When the customer sends this request it triggers an e-mail. San Diego would like to know if this is something we can turn off in MyBCW. The customer will still have the “Contacts” tab to see our Call Center number.

### 4.3 CURRENT FUNCTIONALITY, IF APPLICABLE

The MyBCW Portal has a tab and option to allow customer to select the option to request a County Representative call them, and an area to input information for a call back.

### 4.4 REQUIRED FUNCTIONALITY

With the proposed changes, San Diego County would no longer have the option for customers to select the “Have a County Representative Call” tab from the MyBCW page. This tab would entirely be hidden from view and prevent customers from utilizing that feature entirely.

#### 4.4.1 Population Impacted

| Eligibility Programs | Population Impacted and a Description of the Effect | % of Population or Cases Impacted |
|----------------------|---|-----------------------------------|
| N/A                  |   |                                   |



#### 4.4.2 Counties Impacted

| County    | Population Impacted and a Description of the-Effect   | % of Population Impacted |
|-----------|---|--------------------------|
| San Diego | San Diego County MyBCW Agents would no longer receive messages from MyBCW to return calls to customers. | 100%                     |

#### 4.4.3 County Staff Impacted

| County Position               | Population Impacted and a Description of the Effect   | % of Population Impacted |
|-------------------------------|---|--------------------------|
| County Representative Workers | They will no longer receive emails requesting a call back from this particular functionality in MyBCW Portal. | 100%                     |

#### 4.4.4 Workgroups Impacted

| County Position | Population Impacted and a Description of the Effect | % of Population Impacted |
|-----------------|---|--------------------------|
| N/A             |   |                          |

#### 4.4.5 Programs Impacted

| Program                           | Y/N | Description of the Affect |
|-----------------------------------|-----|---------------------------|
| Adoption Assistance Program       | N   | No Expected Impact.       |
| Approved Relative Caretaker (ARC) | N   | No Expected Impact.       |
| CalWORKs/RCA                      | N   | No Expected Impact.       |
| CalFresh                          | N   | No Expected Impact.       |
| CAPI                              | N   | No Expected Impact.       |
| Child Care                        | N   | No Expected Impact.       |
| CMSP                              | N   | No Expected Impact.       |
| County Specific                   | N   | No Expected Impact.       |
| Employment Services               | N   | No Expected Impact.       |
| Foster Care                       | N   | No Expected Impact.       |
| General Assistance/General Relief | N   | No Expected Impact.       |
| KinGap                            | N   | No Expected Impact.       |

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| Program          | Y/N | Description of the Affect |
|------------------|-----|---------------------------|
| Medi-Cal         | N   | No Expected Impact.       |
| Other (specify): | N   | No Expected Impact.       |

#### 4.4.6 Related Impacts

| Proposals and Projects | Description of Potential Impacts to Counties |
|------------------------|--|
| N/A                    |  |
| County Direct          |  |
| N/A                    |  |
| Service Requests       |  |
| N/A                    |  |

#### 4.4.7 Affected Groups

This section contains the Affected Groups for this project identified at the time of submission of this deliverable. This section will not be changed if there are changes identified in future phases of the project. If there is a Technical System Design (TSD), this deliverable will contain the final Affected Groups for this project.

| Application Services                  |                     |
|---------------------------------------|---------------------|
| Group                                 | Effect Description  |
| Data Access Services (DAS)            | No Expected Impact. |
| Rules Engine (includes Corticon)      | No Expected Impact. |
| Group – Eligibility                   | Effect Description  |
| Authorization                         | No Expected Impact. |
| Benefit Issuance/Foster Care Issuance | No Expected Impact. |
| Benefit Recovery – BV                 | No Expected Impact. |
| EDBC – ARC                            | No Expected Impact. |
| EDBC – CalWORKs                       | No Expected Impact. |
| EDBC – CAPI                           | No Expected Impact. |
| EDBC – CalFresh                       | No Expected Impact. |

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|   |                           |
|---|---------------------------|
| EDBC – Foster Care/KinGap                     | No Expected Impact.       |
| EDBC – GA/GR                                  | No Expected Impact.       |
| EDBC – Medi-Cal                               | No Expected Impact.       |
| EDBC – Other                                  | No Expected Impact.       |
| EDBC – RCA                                    | No Expected Impact.       |
| Error-Prone                                   | No Expected Impact.       |
| Kiosk   | No Expected Impact.       |
| Mass Update                                   | No Expected Impact.       |
| Redetermination – RRR                         | No Expected Impact.       |
| Simulation                                    | No Expected Impact.       |
| Wrap-up                                       | No Expected Impact.       |
| <b>Group – Input, Interfaces, and Inquiry</b> | <b>Effect Description</b> |
| ACCESS CalWIN/IVR/VRU/FRTS                    | No Expected Impact.       |
| Alerts & Tracking                             | No Expected Impact.       |
| Application Architecture                      | No Expected Impact.       |
| Application Registration                      | No Expected Impact.       |
| Appointment Scheduling                        | No Expected Impact.       |
| Case Assignment                               | No Expected Impact.       |
| Client Referral                               | No Expected Impact.       |
| CalWIN Web Application (CWA) – Inquiry        | No Expected Impact.       |
| Contact CalWIN                                | No Expected Impact.       |
| Data Collection                               | No Expected Impact.       |
| Employment Services                           | No Expected Impact.       |
| General System                                | No Expected Impact.       |
| Hearings                                      | No Expected Impact.       |
| History Maintenance                           | No Expected Impact.       |

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|   |  |
|---|--|
| Identity and Access Management  | No Expected Impact.  |
| Index Clearance   | No Expected Impact.  |
| Inquiry   | No Expected Impact.  |
| Inter-County Transfer (ICT)   | No Expected Impact.  |
| Interfaces  | No Expected Impact.  |
| Interfaces – Floating Views   | No Expected Impact.  |
| Interfaces – OSB  | No Expected Impact.  |
| Interfaces – Summary View   | No Expected Impact.  |
| Providers   | No Expected Impact.  |
| Reference Tables Maintenance (App Svcs)   | No Expected Impact.  |
| Security (App Svcs)   | No Expected Impact.  |
| Traffic Log   | No Expected Impact.  |
| <b>Group – Information Reporting</b>  | <b>Effect Description</b>  |
| Business Intelligence   | No Expected Impact.  |
| Client Correspondence <ul style="list-style-type: none"> <li>a. Notices</li> <li>b. Triggers</li> <li>c. Reason Code</li> <li>d. Exstream including Enterprise Content Management (ECM)</li> <li>e. Translations Required?</li> <li>f. Impact to CC Maintenance Modules?</li> </ul> | <ul style="list-style-type: none"> <li>a. No Expected Impact.</li> <li>b. No Expected Impact.</li> <li>c. No Expected Impact.</li> <li>d. No Expected Impact.</li> <li>e. No Expected Impact.</li> <li>f. No Expected Impact.</li> </ul> |
| Fraud Referral Tracking System (San Diego County Only)  | No Expected Impact.  |
| Management Reporting <ul style="list-style-type: none"> <li>a. Extracts</li> <li>b. Detail</li> <li>c. Summary</li> </ul>   | <ul style="list-style-type: none"> <li>a. No Expected Impact.</li> <li>b. No Expected Impact.</li> <li>c. No Expected Impact.</li> </ul>   |
| Periodic Reporting  | No Expected Impact.  |

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| Group – DBA   | Effect Description   |
|---|--|
| CalWIN Database – SQL Server  | No Expected Impact.  |
| Case Copy/Replication (DBA)   | No Expected Impact.  |
| CIS (County Information Server) <ul style="list-style-type: none"> <li>a. CIS Data base schéma changes</li> <li>b. RT changes</li> <li>c. MR Extract changes</li> </ul>                       | <ul style="list-style-type: none"> <li>a. No Expected Impact.</li> <li>b. No Expected Impact.</li> <li>c. No Expected Impact.</li> </ul>   |
| Database Objects (DBA) <ul style="list-style-type: none"> <li>a. Database tables/columns</li> <li>b. Conversion SQLs</li> <li>c. Code SQL reviews</li> <li>d. Production SQL packs</li> </ul> | <ul style="list-style-type: none"> <li>a. No Expected Impact.</li> <li>b. No Expected Impact.</li> <li>c. No Expected Impact.</li> <li>d. No Expected Impact.</li> </ul>                                 |
| Reference Tables Maintenance (DBA) <ul style="list-style-type: none"> <li>a. New RTs</li> <li>b. Columns</li> <li>c. Rows</li> <li>d. Logic</li> <li>e. Refresh SYS TST</li> </ul>            | <ul style="list-style-type: none"> <li>a. No Expected Impact.</li> <li>b. No Expected Impact.</li> <li>c. No Expected Impact.</li> <li>d. No Expected Impact.</li> <li>e. No Expected Impact.</li> </ul> |
| Group – Customer Experience   | Effect Description   |
| MyBenefits CalWIN   | Minor Code Changes.  |
| MyBenefits CalWIN Mobile App  | No Expected Impact.  |
| General   |  |
| Group – Quality   | Effect Description   |
| Technical Writer  | No Expected Impact.  |
| Testing – System  | System Test will test and validate that MyBCW will no longer display the option for San Diego County customers to select “Have a County Representative call”.  |
| Testing – Integration   | No Expected Impact.  |
| Operations  |  |
| Group – Operations  | Effect Description   |

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|  |  |
|--|--|
| Batch & Production Support   | No Expected Impact.  |
| Capacity Planning  | No Expected Impact.  |
| Configuration Management   | No Expected Impact.  |
| System DBA Support   | No Expected Impact.  |
| Engineering  | No Expected Impact.  |
| Management   | No Expected Impact.  |
| Middleware & SW Support  | No Expected Impact.  |
| Network Services <ul style="list-style-type: none"> <li>a. CalWIN on PREM Changes</li> <li>b. Cloud Related Network Changes</li> </ul>   | <ul style="list-style-type: none"> <li>a. No Expected Impact.</li> <li>b. No Expected Impact.</li> </ul>   |
| Cloud <ul style="list-style-type: none"> <li>a. Security</li> <li>b. Monitoring and Performance</li> <li>c. Disaster Recovery</li> <li>d. Storage and Capacity Planning</li> </ul> | <ul style="list-style-type: none"> <li>a. No Expected Impact.</li> <li>b. No Expected Impact.</li> <li>c. No Expected Impact.</li> <li>d. No Expected Impact.</li> </ul> |
| Security   | No Expected Impact.  |
| Storage  | No Expected Impact.  |
| Tuxedo   | No Expected Impact.  |
| UNIX/Linux Services  | No Expected Impact.  |
| Windows Services   | No Expected Impact.  |

## 5 CRITICAL SUCCESS FACTORS

| Critical Success Factor | Description of Expected Measurable Result   |
|-------------------------|---|
| No Emails Sent          | San Diego no longer receives emails from the "Have A County Representative Call" functionality. |

## 6 TRAINING

| Training Artifact                                    | Training Type | High-Level Description of Training |  |  |
|--|---------------|------------------------------------|--|--|
| Release Notes and Highlights                         | Documentation | N/A                                |  |  |
| Online User Manual (OLUM)                            | Manual Update | N/A                                |  |  |
| Best Practice Guides (BPG)/User Guides (UG)          | Manual Update | N/A                                |  |  |
| Systems Operation Plan 35-19 County Responsibilities | Manual Update | Y/N                                | New or Changing County Responsibilities due to the following Project Change: | Description – Detail actions for any Yes |
|  |               | N                                  | Reference Table  |  |
|  |               | N                                  | CalWIN Security Overview   |  |
|  |               | N                                  | Maintenance CalWIN User Accounts   |  |
|  |               | N                                  | Mobile/Portal User Support   |  |
|  |               | N                                  | Business Intelligence User Accounts  |  |
|  |               | N                                  | Employment Services  |  |
|  |               | N                                  | Providers  |  |

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| Training Artifact | Training Type   | High-Level Description of Training |                        |  |
|-------------------|---|------------------------------------|------------------------|--|
|                   |   | N                                  | Case Assignments       |  |
|                   |   | N                                  | Appointment Scheduling |  |
|                   |   | N                                  | Benefit Issuance Setup |  |
| Other             | <ul style="list-style-type: none"> <li>• Documentation and County Calls</li> <li>• Additional County Calls</li> <li>• Scenario Workflows</li> <li>• Renewal Workflow Charts</li> <li>• Medi-Cal Renewal Guide</li> <li>• As defined during BSM</li> </ul> | N/A                                |                        |  |



## 7 ASSUMPTIONS

### 7.1 GENERAL ASSUMPTIONS

This section documents the known assumptions (as of the submission of this document) associated with the delivery of the proposal/project. The following table provides a list of the assumptions:

| Assumption Identifier | Assumption Category | Assumption Description  |
|-----------------------|---------------------|---|
| 1.0                   | Timing              | The actual release date is established by the PCB. This PAC's Target Release is valid based on an approval by Gainwell by __/__/____ to begin the project. If the approval date is not met, then the Targeted Release will be reassessed during the Project Initiation phase based on the actual time that the project was authorized to begin. |
| 2.0                   | County Direct       | County Direct Service Requests will not impact the M&O and the Counties Change Requests of the Systems for the Counties.  |
| 3.0                   | Staff               | Adequate staffing will be available to define the scope, requirements, design, development, testing, and deployment.  |
| 4.0                   | Technical           | No infrastructure software, hardware, and network upgrades or additions have been scoped as part of this change. They will need to be addressed in a separate change or the estimates; both cost and schedule, on this change will need to be revised to include any such changes.  |
| 5.0                   | Technical           | No new environments will be added or setup as a result of this change.  |
| 6.0                   | Technical           | No cloud environment created or impacted as a result of this change.  |
| 7.0                   | Technical           | This solution will be delivered in two phases. The first phase will be delivered for San Diego County only. The second phase will be delivered for the remaining CalWIN Counties.   |

### 7.2 DELIVERABLE ASSUMPTIONS

The following is a list of deliverables to be completed during the delivery of this project.

| Included (Yes/No) | Deliverable Name   | Deliverable Assumption/Exception |
|-------------------|--|----------------------------------|
| Yes               | Project Plan and Work Plan (PWP) – the Work Plan is the PPM schedule | Workplan PPM Schedule            |

| Included (Yes/No) | Deliverable Name   | Deliverable Assumption/Exception |
|-------------------|--|----------------------------------|
| Yes               | Functional Business Requirements (FBR) – includes requirements and Acceptance Criteria from ALM  |                                  |
| Yes               | Technical Specifications Document (TSD)  |                                  |
| Yes               | System Test Plan (STP) – includes reference to test scripts in ALM   |                                  |
| Yes               | System Test Results (STR) – includes reference to test runs and artifacts in ALM   |                                  |
| No                | Training Documentation – includes updates to BPGs, User Guides, and any training materials. The Training Documentation for the Release Project will include the Release Notes, Release Highlights, Technical Specifications Worksheet, and OLUM updates. | N/A                              |
| No                | Delivery Documentation – includes delivery documentation such as updates to Reference Table changes and the RRS Worksheets   |                                  |
| Yes               | Post Implementation Report (PIR)   |                                  |

## 8 CONSTRAINTS

The following table provides a list of the known business and technical constraints at the time of the submission of this document.

| Constraint ID | Type of Constraint | Constraint Description |
|---------------|--------------------|------------------------|
| 1.0           | N/A                |                        |

## 9 BENEFITS

| Is there a cost if the change is not implemented? | YES | NO |
|---|-----|----|
|   |     | X  |

## 10 RISKS

This section documents high-level risks identified during the Business Strategy Meeting(s). If a risk identified in the proposal phase is still open when the project is triggered, the risk will be entered into the project in PPM. Throughout the project lifecycle, the project management team will maintain a list of risks in the Project and Portfolio Management (PPM) tool for the project. This list of risks will be reviewed and updated during the course of the project.

The following table summarizes the risks associated with this proposal at the time of submission of this document.

| ID  | Risk Title | Brief Description of Risk Impact | Overview of the Risk Response Strategy |
|-----|------------|----------------------------------|--|
| N/A |            |                                  |  |

## 11 ALTERNATIVE APPROACHES, IF APPLICABLE

This section includes a listing of any alternative approaches, if applicable, implementation alternatives and BENDS.

### 11.1 ALTERNATE APPROACH OVERVIEW IDENTIFIED DURING BSM/ROM PHASE, IF APPLICABLE

N/A

### 11.2 IMPLEMENTATION ALTERNATIVES

Implementation Alternatives Definition:

1. **Full Automation** – The application is modified to implement the change. Example: Counties are required to un-tick the time on aid clock for child support reimbursement. Full automation would provide a means to receive and record total child support collected, identify the months that would be affected, and un-tick the clock due to child support reimbursement when appropriate.
2. **Partial Automation** – A portion of the change is implemented by modifying CalWIN. This strategy is used in combination with other strategies such as Adaptation of Application or Manual Implementation. Example: Counties are required to un-tick the time on aid clock for child support reimbursement. Partial automation provides users with the ability to un-tick the clock in CalWIN for prior months using a reason of child support. **Note:** There would be a manual process to identify the applicable months.
3. **No Automation** – A non-automated method, such as a paper process, is used to implement the change. Example: Counties are required to un-tick the time on aid clock for child support reimbursement. A manual process is used to identify the month in which child support reimbursement was received and the clock should be un-ticked.

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| Alternatives                 | N/A | Benefit* | Negative Impacts |
|------------------------------|-----|----------|------------------|
| 1. Full Automation           |     |          |                  |
| 2. Partial Automation        |     |          |                  |
| 3. No Automation<br>(Manual) |     |          |                  |

### 11.3 BUSINESS ENVIRONMENT DESIGN STRATEGY (BENDS)

| BENDS<br>Required<br>(Y/N) | Brief Description of BENDS<br>Need | Responsible Party<br>for BENDS<br>Development | Comments |
|----------------------------|------------------------------------|---|----------|
| N                          |                                    |   |          |
| County                     | Contact                            |   |          |
| N/A                        |                                    |   |          |

## 12 EXECUTIVE FINANCIAL SUMMARY

### 12.1 FINANCIAL SUMMARY

The following outlines the cost (price) associated with the scope of changes for this request in the pricing format. This represents a fixed price unless otherwise noted. This price will expire 90 days from submission and may require revision if the project inception is delayed. Once a project is started, invoicing will, however, occur based on the billing table shown in Appendix C.

| Work   | Cost Subtotals | Cost Totals |
|--|----------------|-------------|
| <b>Project Planning: Project Plan and Work Plan (PWP)</b><br><i>(Includes: Initiation of the project, Project Plan and Work plan creation through formal approval, project management oversight through planning phase.)</i>   | \$1,310        |             |
| <b>Requirements Analysis: Functional Business Requirements (FBR)</b><br><i>(Includes: Document creation through to formal approval, any JAD, JRP, etc., project management oversight through FBR phase.)</i>   | \$3,889        |             |
| <b>Design: Technical System Design (TSD)</b><br><i>(Includes: Design, Design Walkthrough and Design document creation through to formal approval, project management oversight through the TSD phase.)</i>   | \$2,650        |             |
| <b>Test Planning: System Test Plan (STP)</b><br><i>(Includes: Test Plan document creation through to formal approval, code and unit test, unit test walkthrough, system test script creation, regression test script updates, and refinement through formal approval, project management oversight through Test Plan phase.)</i>   | \$19,916       |             |
| <b>Testing: System Test Results (STR)</b><br><i>(Includes: Integrated test, system test, and regression test execution and the capture of test results, development of test results documentation through formal approval, development of training and delivery document through to formal approval, project management oversight through the implementation phase.)</i> | \$9,288        |             |
| <b>Post Implementation Report (PIR):</b><br><i>(Includes: Development and delivery of the post-implementation report deliverable.)</i>   | \$1,068        |             |
| <b>County Direct only UAT and Release Level Support Price</b><br><i>(State assumptions of price)</i>   | \$0            |             |
| <b>Gainwell Effort Subtotal</b>  |                | \$38,122    |
| <b>Other</b> <i>(List Hardware, Software, etc.)</i>  | \$0            |             |
| <b>Operational Support</b> <i>(Ongoing, post-Release)</i>  | \$0            |             |

PROJECT APPROACH AND COST (PAC) 62693 - SDG Turn off "Have a County Representative Call" in MyBCW

| Work  | Cost Subtotals | Cost Totals |
|---|----------------|-------------|
| <u>Non-Effort Subtotal</u>  |                | \$0         |
| <u>Grand Total</u>  |                | \$38,122    |
| <u>CalHEERS B Release Level Support</u> <i>(Included in grand total)</i>  |                | N/A         |
| <u>CalSAWS AWS Cost</u> <i>[Not included in grand total – aligns to the Technical Budget Committee Review (TBCR)]</i> |                | N/A         |

ROM was waived for this proposal by WCDS; therefore, the 25% cost variance is not applicable.

## 12.2 TARGETED RELEASE TIMEFRAME

The following is the targeted release timeframe based on the current schedule, scope, and budget. This timeframe may need to be revised if the project inception is delayed.

| Suggested Target Release ID | Suggested Target Release Date | Comments and Rationale for Target Release |
|-----------------------------|-------------------------------|---|
| TBD                         |                               |   |

## 13 QA CHECKLIST

### 13.1 AREAS OF IMPACT CHECKLIST

| Question  | Y/N             | Notes  |              |    |               |    |                             |     |   |  |
|---|-----------------|--|--------------|----|---------------|----|-----------------------------|-----|---|--|
| 1. Does CalWIN do this today?   | N               |  |              |    |               |    |                             |     |   |  |
| 2. Would this change be the same for all eligibility programs? If 'No', what eligibility programs are impacted?   | N               | Strictly impacts the MyBCW Portal.                                   |              |    |               |    |                             |     |   |  |
| 3. Would this change be the same for all employment services programs? If 'No', what employment services programs are impacted?   | N               | Strictly impacts the MyBCW Portal.                                   |              |    |               |    |                             |     |   |  |
| 4. Would there be any changes to how the windows currently look?  | N               | At most, it would simply hide a tab that this feature is located on. |              |    |               |    |                             |     |   |  |
| 5. Would the new information need to be collected on a new or existing window?<br><br>• If yes, has confidentiality been assessed?<br>Follow the confidentiality guidelines listed:<br><table><tr><th>New Information</th><th>Security On</th></tr><tr><td>Child window</td><td>No</td></tr><tr><td>Search window</td><td>No</td></tr><tr><td>Contains Client Information</td><td>Yes</td></tr></table> | New Information | Security On  | Child window | No | Search window | No | Contains Client Information | Yes | N |  |
| New Information   | Security On     |  |              |    |               |    |                             |     |   |  |
| Child window  | No              |  |              |    |               |    |                             |     |   |  |
| Search window   | No              |  |              |    |               |    |                             |     |   |  |
| Contains Client Information   | Yes             |  |              |    |               |    |                             |     |   |  |
| 6. Would the change affect the functionality of the window's icons?   | N               |  |              |    |               |    |                             |     |   |  |
| 7. Do any interface partners receive this information? If Yes, note which partners.   | N               |  |              |    |               |    |                             |     |   |  |
| 8. Are any Management Reports impacted by this change? If yes, which ones and what would change?  | N               |  |              |    |               |    |                             |     |   |  |
| 9. Does the change affect Business Intelligence? If yes, which page and what would change?  | N               |  |              |    |               |    |                             |     |   |  |
| 10. Would the existing correspondence be affected or would new correspondence be required? If so, verify that correspondence is identified in the impacts.  | N               |  |              |    |               |    |                             |     |   |  |

| Question   | Y/N | Notes |
|--|-----|-------|
| 11. Does this change how eligibility is determined?  | N   |       |
| 12. Would the new information need to display on the CalWIN Web application?                   | N   |       |
| 13. Are there end-user references to Food Stamps in the system components impacted by this CR? | N   |       |
| 14. Were the WCDS Guiding Principles for Standardization considered in developing this change? | Y   |       |
| 15. Is there an impact to County Direct services?  | N   |       |
| 16. Will this require changes to the Software Report?  | N   |       |

## 13.2 DELIVERABLE CHECKLIST

| QA Activity  | Requirement Verified/Not Verified | Notes |
|--|-----------------------------------|-------|
| The correct deliverable template is used.  | Verified                          |       |
| No sections were removed from deliverable.   | Verified                          |       |
| Check the title page for the title, project reference, sponsor, owner, version, and date.                    | Verified                          |       |
| Headers/footers are correct.   | Verified                          |       |
| Table of Contents updated.   | Verified                          |       |
| Sections/fields are completed (except the Approval section) or N/A entered if the section is not applicable. | Verified                          |       |
| Template instructions removed.   | Verified                          |       |
| Correct any obvious formatting inconsistencies.  | Verified                          |       |
| Perform grammar/spell check.   | Verified                          |       |
| If any clarifications needed, enter comments via Comment Log.  | Verified                          |       |



| QA Activity   | Requirement Verified/Not Verified | Notes |
|---|-----------------------------------|-------|
| If there were any QA comments requiring rework, re-review deliverable after updates are made. |                                   |       |

## 14 REQUIREMENTS TRACEABILITY MATRIX

The following table list Business Requirements included in the scope of this Project Approach and Cost. If there are existing business requirements that are being modified or retired, the source for these business requirements is ALM. If the business requirement is new, the ALM reference information is N/A.

### 14.1 NEW MODIFIED OR RETIRED REQUIREMENTS

This table includes a list of Business Requirements impacted by this change that are known at the time of submission of this PAC. The source for these Business Requirements is ALM if there are existing Business Requirements that are being modified or retired.

| Line Number | Business Requirement  | ALM Source Project | ALM Requirement Reference | The Scope of Change for ALM Requirement |
|-------------|---|--------------------|---------------------------|---|
| 1           | MyBCW must no longer display the option for San Diego County customers to select "Have a County Representative call". | Self Service       | N/A                       | New                                     |

Any additional requirements identified during the development of the PAC are identified in the following table.

| Line Number | Business Requirement (During PAC phase) | ALM Source Project | ALM Requirement Reference | The Scope of Change for ALM Requirement |
|-------------|---|--------------------|---------------------------|---|
| N/A         |   |                    |                           |   |

### 14.2 IMPLEMENTED REQUIREMENTS NOT MODIFIED

This table includes a list of Business Requirements impacted but not modified by this change known at the time of submission of this PAC. The source for these business requirements is ALM. Implemented requirements are included to help define business process areas impacted by the change yet do not have direct requirements changes.

| Line Number | Business Requirement | ALM Source Project | ALM Requirement Reference |
|-------------|----------------------|--------------------|---------------------------|
| N/A         |                      |                    |                           |

## 15 ACCEPTANCE SIGNOFF

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Acceptance Signoff for this deliverable (63039) is captured in the Project and Portfolio Management (PPM) tool via the Deliverable Management process.

## 16 APPENDIX A – DESIGN NOTES

This Appendix includes design notes related to Reference Table (RT) Only changes.

### 16.1 CIS CHECKLIST

| Will the Implementation of the Project be reasonably expected to:                                | Y/N? | If Y, then specify the impact description |
|--|------|---|
| 1. Change the way the data is being saved, deleted, updated or stored in any table?              | N    |   |
| 2. Change the cardinality of any table relationships?  | N    |   |
| 3. Create new tables?  | N    |   |
| 4. Create new columns in existing tables?  | N    |   |
| 5. Change column attributes in existing tables?  | N    |   |
| 6. Obsolete existing tables?   | N    |   |
| 7. Obsolete existing columns?  | N    |   |
| 8. Change the use of existing columns?   | N    |   |
| 9. Change the way data in a column is calculated (for calculated fields)?                        | N    |   |
| 10. Update existing records to accommodate the change?   | N    |   |
| 11. Change the meaning of existing RT values?  | N    |   |
| 12. Use hard-coded values entered in the databases that are not based on reference table values? | N    |   |
| 13. Change the standard retention of data in any table?  | N    |   |
| 14. Require change to existing queries used to produce CalWIN management reporting extracts?     | N    |   |

| Will the Implementation of the Project be reasonably expected to:                                       | Y/N? | If Y, then specify the impact description |
|---|------|---|
| 15. Require change to existing queries used to retrieve and display data on CalWIN screens?             | N    |   |
| 16. Affect the CIS daily and/or monthly file delivery process and timing?                               | N    |   |
| 17. Change the format or structure of the CIS daily or monthly files?                                   | N    |   |
| 18. Change CIS daily or monthly file names at any level in the compression?                             | N    |   |
| 19. Affect the standard Oracle-based CIS load process?  | N    |   |
| 20. Affect the typical growth of the database size?   | N    |   |
| 21. Are there Reference Table changes?  | N    |   |
| 22. Are tables being added to the CIS Subject Area?   | N    |   |
| 23. CIS Deliverables (DDL/DML, RT Views, and PDM) and CIS Training Manual package generated or updated? | N    |   |

## 16.2 DATABASE CHANGES

The Database Services team completes this section. Complete the Database Changes table only for **approved** exceptions to the PAC usage criteria that include database changes. Otherwise, enter N/A.

| Table | Column | Data Type | Service | Window ID | Window Title | Window Field | Calculated Field Detail * |
|-------|--------|-----------|---------|-----------|--------------|--------------|---------------------------|
| N/A   |        |           |         |           |              |              |                           |

## 16.3 REFERENCE TABLES

The following RT sections only need to be completed for RT Only and COLA RT changes. Full project Reference Table information will continue to be documented in the FBR (if available at the time) and TSD per the typical process.

The following six sections are completed for each reference table affected by the change.

In the event that this proposal is accepted and becomes a project:

- The RT Documentation template for each reference table affected by the change is also completed as part of the design deliverables.
- For existing tables, complete the reference request spreadsheet [RRS] for EACH reference table affected by the change as part of the design deliverables.
- For new tables, the RRS will be generated during the construction phase.

### 16.3.1 Table Information

```
SELECT
'TABLE NAME - ' || REFR_TBL_PHY_NM || CHR(13) || CHR(10) ||
'LOGICAL NAME - ' || REFR_TBL_LGCL_NM || CHR(13) || CHR(10) ||
'SHORT DESC - ' || REFR_TBL_DESC || CHR(13) || CHR(10) ||
'MAINT LEVEL - ' || DECODE(MAINT_LVL_CD,
        'C','COUNTY', 'N','CONSORTIUM',
        'B','BOTH CONSORTIUM AND COUNTY',
        'S','SYSTEM') || CHR(13) || CHR(10) ||
'LEAD TRACK - ' || SUBSYS_NM || CHR(13) || CHR(10)
FROM RT_REFR_TBL A, RT_SUBSYS B
WHERE REFR_TBL_PHY_NM = 'RT_XXX'
AND A.MAINT_SUB_SYS_CD = B.SUBSYS_CD(+);
```

|                   |     |
|-------------------|-----|
| Table Name        | N/A |
| Logical Name      | N/A |
| Short Description | N/A |
| Maint. Level      | N/A |
| Lead Subsystem    | N/A |

### 16.3.2 County-Updatable Columns and Default Values

```
SELECT
B.COL_LGCL_NM || ' - ' || B.COL_PHY_NM
FROM RT_REFR_TBL A, RT_COL B
WHERE A.REFR_TBL_PHY_NM = 'RT_XXXX'
AND A.REFR_TBL_ID = B.REFR_TBL_ID AND B.COL_UPD_SW = 'Y';
```

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| County Updateable Column Name | Row Key Value | Value<br>(PRD Value when updating existing data, Default value when completely new rows) | Counties<br>(All or county codes when value is county specific) | RT Query Date<br>(or indicate N/A when 'Completely new row') |
|-------------------------------|---------------|--|---|--|
| N/A                           |               |  |   |  |

### 16.3.3 Action Information

| Actions to Be Taken on the Table |  | Explanatory Notes |
|----------------------------------|--|-------------------|
| 1                                | If inserting or updating rows, give <i>an</i> approximate number of rows to be inserted or updated.  | N/A               |
| 2                                | If a new table is to be created, list the key fields and the attributes pertinent to the functionality being requested.  | N/A               |
| 3                                | If an existing table is having its structure changed (new column, change existing column length or type, change the primary key, etc.), describe the structure change.   | N/A               |
| 4                                | If data is going to be inserted or updated, specify the effective begin date to be used for the new rows.  | N/A               |
| 5                                | The standard for RTs is: <ul style="list-style-type: none"> <li>All updates will be accompanied by a change of effective begin date.</li> <li>No updates will be done by overlaying / overwriting existing records or data.</li> <li>If a deviation from this standard is planned, note that in the FBR along with the reasons for the deviation.</li> </ul> | N/A               |
| 6                                | If any data conversion will be needed, note the requirement. Generally, data conversion is only needed if key values are being replaced.   | N/A               |
| 7                                | If any SQLs will need to be created for the counties to execute – for example, to identify impacted cases – indicate the need.   | N/A               |

|   | Actions to Be Taken on the Table   | Explanatory Notes |
|---|--|-------------------|
| 8 | <p>If the counties will need to take any action in conjunction with this change request, note the requirement. (Some examples of county actions would include: making updates to consortium/county tables, scheduling an extra batch job run, running SQLs to identify the impacted cases, etc.) <b>Note if these changes are required for the User Acceptance Testing (UAT) release, for the Production release, or both. This information must also be included in the Release Notes prior to the release.</b></p> | N/A               |
| 9 | <p>For RTs that have "year" or "date" fields other than effective begin and end dates, and those date fields are used in the program logic to select the appropriate RT row, make a note of the special logic and document if/how this affects the RT change, the coding, and/or the testing.</p>  | N/A               |

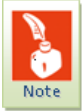
## 16.3.4 Structure Information

- RT structure changes are typically not permitted in the Project Approach and Cost (PAC) Process. In rare instances, an exception can be approved allowing a structure change to be completed with a PAC. If a structural change was approved, this structure information section will be completed. If there are no structure changes planned for this project, this section will be indicated as N/A.

| Column Action<br>(Add Change Delete) | Key Column<br>(Yes/No) | Physical Column Name (24 Characters Maximum) | Logical Column<br>(Attribute Name - 50 Characters Maximum) | Column Description for RT Help<br>(4000 Characters Maximum)                  | Candidate Data Type / Length | Null/Not Null | Display Order | County Update-able<br>(Yes/No) |
|--------------------------------------|------------------------|--|--|--|------------------------------|---------------|---------------|--------------------------------|
| N/A                                  | No                     | USR_SELECT_SW                                | User Select Switch   | Yes/No switch signifying if the user can select the entry.                   | CHAR(1)                      | Not Null      |               | No                             |
| N/A                                  | No                     | EFF_BGN_DT                                   | Effective Begin Date                                       | Date from which the information in the instance of this entity is effective. | DATE                         | Not Null      |               | No                             |
| N/A                                  | No                     | EFF_END_DT                                   | Effective End Date   | Date up to which the information in the instance of the entity is effective. | DATE                         | Null          |               | No                             |



### 16.3.5 Data Information



Only Consortium rows can be added or updated. Some reference tables are only maintained by the Counties; some reference tables have rows maintained by the Consortium and also rows maintained by the Counties. In order to verify that a particular row is a Consortium row, do any one of the following:

1. Execute the following SQL to retrieve the county maint. Switch for the table rows. If the switch value is Y, only the counties can maintain the data; if the value is N, it is a consortium row and you can update it.

```
SELECT A.REFR_TBL_PHY_NM, B.CNTY_MAINT_SW, B.DATA_KEY,
       B.ROW_DATA
FROM RT_REFR_TBL A, RT_DATA B
WHERE A.REFR_TBL_ID = B.REFR_TBL_ID
AND A.MAINT_LVL_CD = 'B'
AND A.REFR_TBL_PHY_NM = 'RT_NCMP_GDCS_RSN';
```

2. Access the reference table in CubeD and click the download button to download the data in a spreadsheet. Check the County Value column on the Reference Table Data tab.
3. Access the reference table in the CalWIN application and view the data. Check the CNTY VAL SW column.

#### Updated Rows Table:

| Row Action<br>(Change, Delete) | Key Value<br>(if composite key specify all key column values) | Column Name and/or Row Key | Old Value | New Value |
|--------------------------------|---|----------------------------|-----------|-----------|
| N/A                            |   |                            |           |           |

#### New Rows Table:

If the RT has county specific columns with differing values across county please copy this following table section for each county with differing values. If there are no county updateable columns or all counties have the same values, then please use 'All Counties' and only one table section is needed.

#### All counties/county name (code)

| Value 1 | Value 2 | Value n | County Action |
|---------|---------|---------|---------------|
| N/A     |         |         |               |

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| Pgm Cd | Actn Cd | Rsn Cd | NOA Rsn Cd | EDBC Sw | Usr Selct Sw | Eff Bgn Dt | Eff End Dt |
|--------|---------|--------|------------|---------|--------------|------------|------------|
| N/A    |         |        |            |         |              |            |            |

#### 16.3.6 Program List

| Program Name | Action Required<br>("No Action", "Recompile", or "Changed") |
|--------------|---|
| N/A          |   |

### 16.4 CLOUD ARCHITECTURE DESIGN

Full Project Cloud Architecture information will continue to be documented in the FBR (if available at the time) and TSD per the typical process. For CalSAWS projects, these updates are also subject to CalSAWS Governance.

## 17 APPENDIX B – HOURS SUMMARY

This Appendix includes the summary of hours upon which the Financial Summary was based. The hours allocated in each area will be further refined during the creation of the work plan and are therefore subject to change.

| ITEM                                   | HOURS        |
|--|--------------|
| Project and Work Plan (PWP)            | 9.2          |
| Functional Business Requirements (FBR) | 27.3         |
| Technical System Design (TSD)          | 18.6         |
| Coding and Unit Testing (CUT)          | 91.4         |
| System Test Plan (STP)                 | 48.4         |
| System Test Results (STR)              | 65.2         |
| Training Documentation (TRN)           | 0            |
| Delivery Documentation                 | 0            |
| Post Implementation Report (PIR)       | 7.5          |
| CalHEERS Release B                     | 0            |
| <b>TOTAL*</b>                          | <b>267.6</b> |

*\*Footnote: 35.4 contingency hours are included in the estimated total.*

## 18 APPENDIX C – BENEFIT LINES

This Appendix includes the financial summary used to enter the Benefit Lines in PPM.

The following outlines the cost (price) associated with the scope of changes for this request in the billing format. This represents a fixed price unless otherwise noted. This price will expire 90 days from submission and may require revision if the project inception is delayed.

| Work   | Cost Subtotals | Cost Totals |
|--|----------------|-------------|
| <b>Project Plan and Work Plan (PWP) (10% of total price)</b><br><i>(Includes: Initiation of the project, Project Plan and Work plan creation through formal approval, project management oversight through planning phase.)</i>  | \$3,812        |             |
| <b>Functional Business Requirements (FBR) (20% of total price)</b><br><i>(Includes: Document creation through to formal approval, any JAD, JRP, etc., project management oversight through FBR phase.)</i>   | \$7,624        |             |
| <b>Technical System Design (TSD) (20% of total price)</b><br><i>(Includes: Design, Design Walkthrough and Design document creation through to formal approval, project management oversight through the TSD phase.)</i>  | \$7,624        |             |
| <b>System Test Plan (STP) (20% of total price)</b><br><i>(Includes: Test Plan document creation through to formal approval, code and unit test, unit test walkthrough, system test script creation, regression test script updates, and refinement through formal approval, project management oversight through Test Plan phase.)</i>   | \$7,624        |             |
| <b>System Test Results (STR) (20% of total price)</b><br><i>(Includes: Integrated test, system test, and regression test execution and the capture of test results, development of test results documentation through formal approval, development of training and delivery document through to formal approval, project management oversight through the implementation phase.)</i> | \$7,624        |             |
| <b>Post Implementation Report (PIR) (10% of total price)</b><br><i>(Includes: Document creation through to formal approval, project management oversight through Post Implementation Phase.)</i>   | \$3,812        |             |
| <b>County Direct only UAT and Release Level Support Price</b><br><i>State assumptions of price:</i>  | \$0            |             |
| <b>Gainwell Effort Subtotal</b>  |                | \$38,122    |
| <b>Other</b> <i>(List Hardware, Software, etc.)</i>  | \$38,122       |             |
| <b>Operational Support</b> <i>(Ongoing, post-Release)</i>  | \$0            |             |

## PROJECT APPROACH AND COST (PAC) 62693 - SDG Turn off "Have a County Representative Call" in MyBCW

| Work                       | Cost Subtotals | Cost Totals |
|----------------------------|----------------|-------------|
| <u>Non-Effort Subtotal</u> |                | \$0         |
| <u>Grand Total</u>         |                | \$38,122    |

## 19 PROJECT COSTS

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Please see Appendix C for detailed project costs.

## 20 COST ASSUMPTIONS

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The following assumptions were made by the Vendor, or developed in conjunction with the County, for the creation of this document. Any decisions made by the County that may modify these assumptions may affect the cost, schedule or outcome of this project.

The Consortium will provide payment for this Change Request on behalf of San Diego County as the functionality added will be made available to all 18 counties.

## 21 PAYMENT SCHEDULE – TERMS AND CONDITIONS

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The Consortium will be invoiced upon completion of the services. Payment is due within thirty days.



PROJECT APPROACH AND COST (PAC) 62693 - SDG Turn off "Have a County Representative Call" in MyBCW    Type text here

## 22 COUNTY DIRECT APPROVAL

The Consortium agrees to the terms and conditions detailed in this County Direct Agreement.

|                            |   |       |          |
|----------------------------|---|-------|----------|
| Proposal<br>Number - Title | 62693 - SDG Turn off "Have a County Representative Call" in MyBCW | Total | \$38,122 |
|----------------------------|---|-------|----------|

|   |           |
|---|-----------|
|  | 9/22/2022 |
| County Authorized Signature   | Date      |
| Mirna Lopez   |           |
| Approver's Name   |           |
| CalWIN Manager-San Diego  |           |
| Approver's Title  |           |
| County of San Diego - HHSA   Self-Sufficiency Services                            |           |
| Approver's Division/Department  |           |
| Office: 619-338-2884   Cell: 619-694-7977   |           |
| Approver's Phone Number   |           |

|   |           |
|---|-----------|
|  | 9/26/2022 |
| Business Office Review  | Date      |
|  | 9/26/22   |
| Gainwell Technologies Authorized Signature  | Date      |
| Dawn Wilder, Account General Manager  |           |
| Approver's Name - Title   |           |
| 1 (626) 625-0691  |           |
| Approver's Phone Number   |           |

PROJECT APPROACH AND COST (PAC) 62693 - SDG Turn off "Have a County Representative Call" in MyBCW

CalSAWS Authorized Signature

*Holly Murphy*

Date 10/4/2022

CalSAWS Executive Director or Designee

Approver's Name - Title

Holly Murphy, CalSAWS PMO Director

Approver's Phone Number

916-549-5696

PROJECT APPROACH AND COST (PAC) 62693 - SDG Turn off "Have a County Representative Call" in MyBCW

Template Version Number: 11.0

Template Effective Date 08/20/2021