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CalSAWS CalWIN Implementation Support Services (ISS) Work Order

CalSAWS – CalWIN Implementation Support Services (ISS) Project
Work Order

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1.0 Work Order Submission & Approval Form

Work Order Number	3
Work Order Title	San Diego County – Additional Business Support
Submitted Date	8/1/2023
Originator	County of San Diego
Priority	<p>Select the estimated priority level of the requested Work Order:</p> <p><input type="checkbox"/> Critical – is necessary to avoid potential project stoppage.</p> <p><input checked="" type="checkbox"/> High – is necessary to avoid potential significant impact to the goals and objectives of the project.</p> <p><input type="checkbox"/> Medium – is necessary to avoid potential impact to the operational efficiency of project execution.</p> <p><input type="checkbox"/> Low – needs to be addressed, but the estimated impact to the project is minimal.</p>
Detailed Description	<p>The County of San Diego ("County"), as a member of the California Statewide Automated Welfare System (CalSAWS) Consortium, a party to Amendment No. Two of the CalWIN Implementation Services Agreement by and between CalSAWS Consortium and Deloitte Consulting LLP, dated as of September 10, 2021, the terms of which are incorporated by reference and attached to this County Purchase order ("County Purchase"), has requested configuration-related business support from Deloitte Consulting LLP associated with the CalSAWS project. This request requires charges for Deloitte Consulting LLP to provide such support to the County, which are further described in this County Purchase order.</p> <p>Configuration Verification and Working sessions were held with San Diego County March 15, 2023, through March 24, 2023. Configuration documents, including the CalSAWS Configuration Guide and Configuration Templates were used to document county decisions regarding CalSAWS configurations. The areas of Configuration covered during these sessions included:</p> <ul style="list-style-type: none"> • Core CalSAWS Configuration • Task Management Configuration • Document Routing Rules • Max Caseload Split • Authorizations and Thresholds • Security

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Enhanced support will be provided to San Diego County Social Services Agency in the following areas:

- Configuration-Related Business Support – provide support for pre- and post-Go Live configuration in San Diego. This includes research, planning and documentation, as it relates to County-led configuration activities. These items may include:
 - Core CalSAWS configuration
 - Task management configuration - research where tasks are landing and determine if adjustments are needed
 - Document routing rules
 - Max caseload split
 - Authorizations and thresholds
 - Security
 - Data Cleanup – provide support to clean up data that migrated from CalWIN that is not relevant to day-to-day business in CalSAWS
 - Process Review – review county process to validate configuration documented during verification and working sessions meets business need
 - Resource Planning – assist county in determining ongoing needs for configuration and task management support. For example, Task Committee, Security Committee, etc.
 - Additional Configuration needs related to Automated Actions and Document Routing Rules
 - Task Banks and Get Next Functionality

Assumptions:

- Resources will support the project onsite at a County of San Diego office location with up to 12 trips onsite. Trips are assumed to be up to 4 days in duration. When not onsite, assistance to the County will be delivered in a hybrid environment, as agreed upon with San Diego County.
- County leadership and staff will be able to allocate resources to support discovery sessions and review and provide feedback on materials produced.
- A kick-off event confirming understanding, scope and outputs will be conducted within one week of anticipated work initiation.
- Resources will start as soon as possible (expected July 2023). The parties have agreed to Deloitte providing the following resources: one Analyst and one OCM Manager (limited hours per week, remote) until hours in Section 2.1 below are utilized or the Agreement expires.
- County leadership will reserve the right to approve or disapprove Contractor's Staff.
- County project team will provide configuration-related business support as agreed upon with the County
- County will continue to follow established processes for gathering information from the Consortium, such as reaching out to

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	<p>Regional Managers for Q&A or best practices from other Counties.</p> <ul style="list-style-type: none">• Configuration support will be focused on CalSAWS. Business support activities will be focused on systems interacting with CalSAWS.	
Review Date	8/1/2023	
Type of Work Order	<input type="checkbox"/> Fixed Fee	<input checked="" type="checkbox"/> Time & Material

CalSAWS – CalWIN Implementation Support Services (ISS) Project**Work Order****2.0 Work Order Impact Analysis**

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

Design Impact	N/A
Development	N/A
Testing	N/A
Training	N/A
Communications	N/A
Performance	N/A
Software/Licenses	N/A
Deliverables (New and Updated)	N/A
Schedule	N/A
Implementation Support Services	Providing additional support to the County will provide resource planning for other County configuration activities to better serve customers and clients. It will enable San Diego County personnel to focus on priority pre- and post- Go Live activities with support from the analyst resource.

2.1 Work Order Hours

Enter estimated hours required to support this Work Order by resource type and provide a brief description of work to be completed.

Type	Description	Rate	Hours	Amount
OCM	OCM Manager	\$231.72	214	\$49,588.08
BPR	Senior Business Analyst	\$191.23	1080	\$206,528.40

CalSAWS – CalWIN Implementation Support Services (ISS) Project**Work Order****2.2 Payment Schedule (If Applicable)**

This Work Order is fully funded by the unallocated funds for additional Services provided under the Agreement added in Amendment No. Two in the amount of Eight Million Dollars (\$8,000,000).

Payment Point	Description	Submission Date	Cost
Monthly	Monthly report summarizing activities completed for the month associated with the three areas of support and total hours expended	Monthly	Variable based on hours
Total Charges:			\$256,116.48

Enter any new deliverable(s) which will be created to support this Work Order.

#	Deliverable Title	Description	Submission Date
N/A	N/A	N/A	N/A
N/A	N/A	N/A	N/A

2.3 Consortium Responsibilities

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

Work	Work Description
N/A	N/A

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3.0 County Work Order Approval

This County Work Order is accepted as allowing Deloitte Consulting LLP to proceed.

CERTIFICATION BY COUNTY:

By submitting this County Work Order, County certifies that its request for goods or services pursuant to this County Work Order is consistent with County's procurement requirements and procedures and that County is seeking goods and services to be utilized primarily in connection with the Project rather than goods or services to be utilized primarily in connection with non-Project related County operations.

County Counsel

Dated: 8-22-2023


By: 

Name: Kyle Sand

Title: Senior Deputy

County Director

Dated: 8-22-23

By: 

County Director

CalSAWS – CalWIN Implementation Support Services (ISS) Project**Work Order****4.0 Work Order Approval**

Approved	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Consortium Executive Director Signature	<i>John Boule</i>	
Consortium Executive Director Name	John Boule	
Date	01-Sep-2023 7:44:26 AM PDT	

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

DELOITTE CONSULTING LLP

Dated: 23-Aug-2023 | 2:41:09 AM IST

By: *Rachel Frey*

Name: Rachel Frey

Title: Principal

CALSAWS CONSORTIUM

Dated: 01-Sep-2023 | 7:44:26 AM PDT

By: *John Boule*

John Boule, Consortium Executive Director

Certificate Of Completion

Envelope Id: 4B0AD1885F7D424EA8B32C8A0FD078A4

Status: Completed

Subject: Complete with DocuSign: Work Order_Deloitte_CalWIN ISS_WO 3_San Diego County Additional Busines...

Use Case: Contract/Service Agreement

Data Classification: High Risk Confidential

WBS (N/A if not available): N/A

Source Envelope:

Document Pages: 9

Signatures: 3

Envelope Originator:

Certificate Pages: 6

Initials: 2

Katherine O'brien

AutoNav: Enabled

Two Jericho Plaza 3rd Floor

Envelopeld Stamping: Enabled

ATTN: Accounts Payable

Time Zone: (UTC-08:00) Pacific Time (US & Canada)

Jericho, NY 11753

IP Address: 24.206.82.52

Record Tracking

Status: Original

Holder: Katherine O'brien

Location: DocuSign

8/22/2023 1:57:10 PM

Signer Events**Signature****Timestamp**

Rachel Frey



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Signed: 8/22/2023 2:11:09 PM

Principal

Deloitte US Account

Security Level: Email, Account Authentication
(None)

Signature Adoption: Uploaded Signature Image

Using IP Address: 24.206.66.40

Electronic Record and Signature Disclosure:

Not Offered via DocuSign

Lenecia Miles



Sent: 8/22/2023 2:11:16 PM

Viewed: 8/31/2023 7:09:54 PM

Signed: 8/31/2023 7:10:13 PM

Security Level: Email, Account Authentication
(None)

Signature Adoption: Pre-selected Style

Using IP Address: 71.38.48.31

Electronic Record and Signature Disclosure:

Accepted: 8/31/2023 7:19:06 PM

ID: ce9698b1-82df-44a0-b34c-a0f71b9e0b6e

Company Name: Deloitte

Holly Murphy



Sent: 8/31/2023 7:10:15 PM

Viewed: 9/1/2023 7:35:27 AM

Signed: 9/1/2023 7:36:45 AM

CalSAWS PMO Director

Security Level: Email, Account Authentication
(None)

Signature Adoption: Pre-selected Style

Using IP Address: 108.201.86.99

Electronic Record and Signature Disclosure:

Accepted: 9/1/2023 7:39:41 AM

ID: 9fba2cb8-949e-400a-942f-81b2714e51eb

Company Name: Deloitte

Signer Events	Signature	Timestamp
John Boule CalSAWS Executive Director Security Level: Email, Account Authentication (None)	 Signature Adoption: Pre-selected Style Using IP Address: 98.238.164.252	Sent: 9/1/2023 7:36:47 AM Viewed: 9/1/2023 7:44:08 AM Signed: 9/1/2023 7:44:26 AM

Electronic Record and Signature Disclosure:
Accepted: 9/1/2023 7:44:08 AM
ID: 8c6fd584-6b13-4bd5-a1b3-2411ea55db67
Company Name: Deloitte

In Person Signer Events	Signature	Timestamp
Editor Delivery Events	Status	Timestamp
Agent Delivery Events	Status	Timestamp
Intermediary Delivery Events	Status	Timestamp
Certified Delivery Events	Status	Timestamp
Carbon Copy Events	Status	Timestamp
Susanne Nielson Security Level: Email, Account Authentication (None) Electronic Record and Signature Disclosure: Not Offered via DocuSign	<div>COPIED</div>	Sent: 8/22/2023 2:11:10 PM Viewed: 8/23/2023 9:47:49 AM
Christina Tung Deloitte US Account Security Level: Email, Account Authentication (None) Electronic Record and Signature Disclosure: Not Offered via DocuSign	<div>COPIED</div>	Sent: 8/22/2023 2:11:11 PM
Matt Wasno Security Level: Email, Account Authentication (None) Electronic Record and Signature Disclosure: Not Offered via DocuSign	<div>COPIED</div>	Sent: 8/22/2023 2:11:12 PM
Nik Knight Security Level: Email, Account Authentication (None) Electronic Record and Signature Disclosure: Not Offered via DocuSign	<div>COPIED</div>	Sent: 8/22/2023 2:11:13 PM Viewed: 8/23/2023 6:32:49 AM
Duncan Gilliam CalWIN ISS - Project Manager Security Level: Email, Account Authentication (None) Electronic Record and Signature Disclosure: Accepted: 5/19/2023 8:43:05 AM ID: 7fc8b135-adb7-49d8-8723-07e20891360c Company Name: Deloitte	<div>COPIED</div>	Sent: 8/22/2023 2:11:14 PM

Carbon Copy Events	Status	Timestamp
Jeric Huang	COPIED	Sent: 8/22/2023 2:11:15 PM
Security Level: Email, Account Authentication (None)		
Electronic Record and Signature Disclosure: Not Offered via DocuSign		
Eric Capati	COPIED	Sent: 8/22/2023 2:11:15 PM
Security Level: Email, Account Authentication (None)		
Electronic Record and Signature Disclosure: Not Offered via DocuSign		
Witness Events	Signature	Timestamp
Notary Events	Signature	Timestamp
Envelope Summary Events	Status	Timestamps
Envelope Sent	Hashed/Encrypted	8/22/2023 2:07:54 PM
Certified Delivered	Security Checked	9/1/2023 7:44:08 AM
Signing Complete	Security Checked	9/1/2023 7:44:26 AM
Completed	Security Checked	9/1/2023 7:44:26 AM
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Required hardware and software

Operating Systems:	Windows® 2000, Windows® XP, Windows Vista®; Mac OS® X
Browsers:	Final release versions of Internet Explorer® 6.0 or above (Windows only); Mozilla Firefox 2.0 or above (Windows and Mac); Safari™ 3.0 or above (Mac only)
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Screen Resolution:	800 x 600 minimum
Enabled Security Settings:	Allow per session cookies

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