

California Statewide Automated Welfare System (CalSAWS)

County Purchase SD-02-2024 San Diego County – Task Configurations

I. Overview:

Pursuant to Section 4.6 of Exhibit X (Maintenance and Operations ("M&O") Extension) of the Amended Restated and Revised Leader Replacement System Agreement dated August 16, 2019 (the "Base Agreement") between CalSAWS Consortium and Accenture LLP ("Accenture"), San Diego County ("County") has requested support to implement data changes in CalSAWS related to task management configuration, as further described in this County order form (the "County Purchase").

II. Scope:

The County identified a business requirement for Accenture to provide support and implement data changes to assist the County with configuration changes for task management. This County Purchase describes the Regulatory and Administrative ("R&A") Change Budget Services for Accenture to provide technical consulting support to build the related infrastructure and deploy it in the County's existing Customer Service Center ("CSC") environments.

The one-time R&A Change Budget Services include up to 335 hours to assist the County with the following:

- Providing support to apply data changes to update task management configuration changes in CalSAWS to append to Task Types/Sub-Types.
 - There are twenty-five (25) Task Types/Sub-Types to be appended into, and sixty-two (62) Task Types/Sub-Types that require the append configuration.
 - Each of the twenty-five (25) Task Types/Sub-Types that require appending would be configured to append to itself (twenty-five (25) Task Types/Sub-Types x one (1) Configuration each = twenty-five (25) configuration entries).
 - Each of the sixty-two (62) Task Types/Sub-Types would be configured to append into each of the twenty-five (25) provided Task Types/Sub-Types (sixty-two (62) Task Types/Sub-Types x twenty-five (25) Configurations each = 1,550 configuration entries), for a maximum of 1,575 configuration entries (1,550 + twenty-five (25)).
- Providing support to update task management configuration for Quality Assurance tasks so that specified tasks will be routed to the appropriate position in CalSAWS.
- Providing support to update task management configuration for Document Routing Rules in CalSAWS.
- Optional: Implementing a rollback option to revert all data and configuration changes as requested by the County.

This County Purchase also includes R&A Change Budget Services of up to forty (40) hours for administration of the County Purchase order. This includes the management of the County Purchase work plan, coordination with CalSAWS teams and the County, tracking of the County Purchase progress, and providing status updates.

The scope of this County Purchase includes the following:

- One-Time R&A Change Budget Services

III. Assumptions:

- The charges set forth in Section V below (the “Total Charges”) are based on the scope of work outlined in this County Purchase. Any changes in scope must be mutually agreed upon by Accenture and the County in writing and may result in additional charges. These additional charges will be executed as a revision to this County Purchase.
- One-Time R&A Change Budget Services will be worked and invoiced on a time and materials (“T&M”) basis up to a maximum of 375 hours. One-time R&A Change Budget Services are estimated to commence upon approval of this County Purchase and continue through September 30, 2024. Invoices for such charges will be submitted to the Consortium monthly in arrears, and the Consortium will, in turn, invoice the County. The County will be invoiced for actual hours worked.
 - Up to 375 hours will be worked and invoiced in State Fiscal Year (“SFY”) 2024/25, estimated to commence June 1, 2024. Such hours may be worked and invoiced through the end of SFY 2024/25, May 31, 2025. If the County requests more hours for SFY 2024/25 or SFY 2025/26, a revision to this County Purchase would be required.
 - If the County requests offshore/onshore staffing mix changes, then a revision to this County Purchase would be required.
 - Accenture and County will monitor the hours for R&A Change Budget Services and discuss the addition of more hours with the County if necessary. Any additional hours required for R&A Change Budget Services would result in additional charges. These additional charges would be provided to the County in a separate County Purchase.
- Accenture will work with the County to develop a schedule for this project upon approval of this County Purchase.
- Accenture will conduct regular meetings with the County team via Microsoft Teams to manage activities performed under this County Purchase order. All work will be performed remotely within the fifty (50) United States and the District of Columbia.
- This estimate includes optional hours to implement a rollback data change at the County’s request. Accenture will work with the County to develop a schedule for this change should the County elect to roll back the data change.
- Any task configuration entries will include a metadata attribute allowing a rollback option to identify the specific records that were introduced by these changes in a straightforward manner.
- The timeframe of two (2) to three (3) months to implement the initial configuration adjustments is based on all requirements being implemented at the same time, and dependent on when County responses are provided for needed specifics during the design phase. If the rollback data change becomes needed after implementation, additional time beyond the provided timeframe may be needed to coordinate a deployment window.
- Backup data will be preserved for a period of fifteen (15) days from implementation of the changes for the possible rollback option.

- If task configurations are modified by the County after implementation and the County chooses to roll back the changes, the subsequent modifications by the County will not be retained.
- The rollback option is limited to the task configurations that were introduced by this change.
- Append Task Types/Sub-Types:
 - All Task Types/Sub-Types provided by the County remain available and unchanged in CalSAWS until the time of implementation.
 - If any of the requested configurations have already been entered in CalSAWS at the time of implementation, these changes will not introduce a second duplicate configuration entry. If this scenario is encountered, the grand total of configuration entries may be less than the 1,575 mentioned above.
 - The task management append processing does not evaluate the Program of the new Task while determining append candidate Tasks. This processing is at the Case level.
- Quality Assurance Task Configuration:
 - The positions to configure based on the County-provided listing are the only positions that will be considered. Any new positions created after the listing is extracted will not be included/configured.
 - Changes are limited to Position/Task Category configurations only and do not include modifications to other configurations such as Task Type and/or Task Bank Categories.
- Document Routing Rule Task Configuration:
 - The Program/Program Status combinations that will be created are only those combinations that are valid per the online page validations. For example, a program-based rule for the CalWORKs program will not be created for the Deregistered Status.
 - All program-based rules to be added/modified for the Medi-Cal program with Status of Discontinued will have a common assignment value of "Most Recent Worker Within 90 Days."
 - The "time-based constraint" for all other Program Based Rules for Denied or Discontinued status will be a common value. For example, "Most Recent Worker Within 30 Days." The County will provide this information during the design phase.
 - The County will provide specifics for the setting of the Sibling Assignment attribute and confirm any Task Bank specifics for the program-based rule.
- The County will identify and provide the appropriate County staff to support project activities throughout the term of this County Purchase.
- The County must (1) approve this County Purchase and (2) provide the corresponding approved Advance Planning Document ("APD") or alternative form of authorized spending from the Office of Technology and Solutions Integration ("OTSI") that supports this purchase by May 17, 2024, to proceed with this purchase. Otherwise, the estimates provided in this County Purchase will not be valid and a new County Purchase will be required.

IV. Schedule:

The charges associated with this County Purchase will be incurred during SFY 2024/25.

V. Total Charges:

The following table outlines the total charges for this County Purchase.

Total County Purchase Charges	SFY 23/24	SFY 24/25	SFY 25/26	Total Charges
One-Time R&A Change Budget Services	\$0.00	\$67,867.20	\$0.00	\$67,867.20
Hardware and Software Charges	\$0.00	\$0.00	\$0.00	\$0.00
Hardware Charges	\$0.00	\$0.00	\$0.00	\$0.00
Hardware Maintenance and Support Charges	\$0.00	\$0.00	\$0.00	\$0.00
Software Charges	\$0.00	\$0.00	\$0.00	\$0.00
Software Maintenance and Support Charges	\$0.00	\$0.00	\$0.00	\$0.00
Production Operations Charges	\$0.00	\$0.00	\$0.00	\$0.00
One Time Charges	\$0.00	\$0.00	\$0.00	\$0.00
Recurring Charges	\$0.00	\$0.00	\$0.00	\$0.00
Total Charges	\$0.00	\$67,867.20	\$0.00	\$67,867.20

VI. Attachment 1 to the County Purchase SD-02-2024 - Pricing Schedules

COUNTY PURCHASE APPROVAL

Subject: County Purchase - SD-02-2024

The subject document is accepted as allowing Accenture LLP to proceed with the subject County Purchase.

San Diego County

By: [Signature]

Printed Name: Ortiz Warner

Title: (Director or Deputy Director)

Date: 4-15-24

Approved as to Form:

San Diego County Counsel

By: [Signature]

Printed Name: Kyle Sand

Title: Sr. Deputy County Counsel

Date: 4/15/24

Notice Address:

Health and Human Services agency
1255 Imperial Avenue
San Diego, CA 92101

CalSAWS Consortium

By: Holly Murphy
Holly Murphy (May 15, 2024 08:14 PDT)

Printed Name: Holly Murphy

Title: CalSAWS PMO Director

Date: May 15, 2024

Notice Address:

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Accenture LLP

By: Arnold J. Malvick
Arnold J. Malvick (May 14, 2024 16:47 PDT)

Printed Name: Arnold J. Malvick

Title: Accenture Project Executive

Date: May 14, 2024