

THE BOARD OF SUPERVISORS OF THE COUNTY OF STANISLAUS  
ACTION AGENDA SUMMARY

*CA*

DEPT: Community Services Agency

BOARD AGENDA # \*B-6

Urgent  Routine

AGENDA DATE January 10, 2012

CEO Concurs with Recommendation YES  NO   
(Information Attached)

4/5 Vote Required YES  NO

SUBJECT:

Approval of the Agreements Between the Community Services Agency and the California Statewide Automated Welfare Systems (SAWS) Consortium IV (C-IV) Joint Powers Authority for County Purchases for the C-IV Contact Center Project

STAFF RECOMMENDATIONS:

1. Approve the agreements between the Community Services Agency and the California Statewide Automated Welfare Systems (SAWS) Consortium IV (C-IV) Joint Powers Authority for County Purchases for the C-IV Contact Center Project.
2. Authorize the Director of the Community Services Agency, or her Assistant Director Designee to finalize and sign the agreements and any amendments not to exceed the contract amounts.

FISCAL IMPACT:

California Statewide Automated Welfare System (SAWS) Consortium IV (C-IV) County Purchases ST-06-2011, ST-07-2011 and ST-FDC-01-2012 total \$2,631,907. The individual contract amounts are \$2,163,197, \$394,004 and \$74,706. The portion of Contact Center Project that will be completed by June of 2012 totals \$2,080,804. The remainder of \$551,103 represents five years of maintenance & operations costs to be budgeted in future Budget Years beginning in 2012-2013.

Continued on Page 2

BOARD ACTION AS FOLLOWS:

No. 2012-014

On motion of Supervisor Chiesa, Seconded by Supervisor De Martini  
and approved by the following vote.

Ayes: Supervisors: Chiesa, Withrow, Monteith, DeMartini and Chairman O'Brien

Noes: Supervisors: None

Excused or Absent: Supervisors: None

Abstaining: Supervisor: None

1)  Approved as recommended

2)  Denied

3)  Approved as amended

4)  Other:

MOTION:

*Christine Ferraro*

ATTEST: CHRISTINE FERRARO TALLMAN, Clerk

File No.

### **FISCAL IMPACT: Continued**

These Contact Center agreements are funded by annual Federal and State allocations for the CalWORKs, CalFresh and Medi-Cal programs operated by the Community Services Agency (CSA) StanWORKs Division. CalFresh and Medi-Cal are 100% Federal and State funded. There is no county share of cost in the C-IV benefiting programs beyond the base CalWORKs Maintenance of Effort (MOE) which has already been provided within the 2011-2012 Adopted Final Budget. The CalWORKs MOE represents mandated county share of cost factored in the development of each annual County Budget. Existing appropriation authority supports the Contact Center Project through Fiscal Year 2011-2012. There is no impact to the County General Fund as a result of the C-IV Contact Center Project.

### **DISCUSSION:**

The Stanislaus County Community Services Agency (CSA) is one of 39 counties that partners in the C-IV SAWS Consortium IV (C-IV). C-IV provides the computer system automation for public assistance program eligibility determination, as well as welfare to work case management and financial/statistical reporting documentation required by the State of California for social services program administration. As part of this consortium, CSA benefits from new technologies developed to meet program mandates and improve business process efficiency of public assistance programs. As a result of the ongoing local effort to review business processes the Agency has determined a need to improve business efficiencies by moving to the C-IV Customer Contact Center business model in the StanWORKs Division.

StanWORKs programs have experienced tremendous caseload growth over the past 3 fiscal years. The number of Stanislaus County citizens needing assistance has reached an all time high, with 1 in 3 County residents receiving services from CSA. Since Fiscal Year 2007-2008, the CalWORKs program has increased 23.4% to 31,037 persons served each month. During this same time period, there has been a 93.2% increase in the number of persons receiving CalFresh with approximately 56,862 individuals not otherwise aided and a 16.9% increase in the number of persons receiving Medi-Cal for a total of 79,051 each month. To address this customer increase, CSA case management staff has been restored to 306.8 FTE's as of September 2011, an increase from 261.4 FTE's in Fiscal Year 2008-2009. Even with the restoration of these positions, it has become increasingly difficult to meet the demand for services within mandated time periods.

Delays in processing applications can present significant hardship for families who may be faced with a lack of food, or in need of medical care or housing support which can be eased with eligibility benefits issuance. The California Department of Health Services (CDHS) standard for timely Med-Cal processing requires that 90% of all applications be processed within 45 days. In 2010, the county's processing rate averaged 86.5%, with its

lowest level below 74%. Currently, approximately 200 applications exceed the 45 day process requirement per month. In Fiscal Year 2010-2011, CalWORKs and CalFresh applications were processed on average in 27 days. Current application processing time frames can extend to periods as long as 45 days from the initial date of the interview, exceeding the State mandated 30 day time frame. As a result, it is necessary to change the way eligibility services are delivered to the community and adopt a more efficient business model using the C-IV Contact Center Project. It is anticipated that this model will allow customers to be served in a more timely manner and will assist in meeting program mandates for timely and accurate eligibility determinations and benefit issuance.

The C-IV Contact Center Project integrates call center technology with the current CSA C-IV automated case management system. There are many advantages to moving to this model, both to the customers we serve and in the administration of the services. In this new model, CalWORKs, CalFresh and Medi-Cal customers will be able to call one number to find out information about their case or to talk to an agent. Customers will not have to call a number for a specific case manager and they will be navigated through the contact center based on the reason they are calling. Customers will be authenticated in the system, which means that the individual will provide personal identifying information to ensure that the person calling is the recipient, thereby maintaining confidentiality in the system. Once authenticated, the customer will then be given options to find out about their case through an automated system or by talking to a live agent. The automated system allows the customer to determine the status of their case, benefit amount, and to request required forms. If the customer chooses to speak to a live agent, the agent will be a Family Services Specialist or Administrative Clerk depending on the reason the customer is calling. Customers will not have to leave a message and wait for a return phone call. They will be able to get help right away.

The administrative advantages include customer self service, or if a customer does need to speak to an agent, the agent will have immediate access to the customer's case information. It is estimated that the time saved from automated customer authentication will be approximately 3 minutes per customer call. Based on the average call volume of 930 calls per day, a potential 46 hours of manpower savings could be realized. The C-IV Contact Center Project also incorporates a quality management feature by monitoring and recording a percentage of calls that are received, as well as the number of calls received and the call wait time for our customers. Access to this historical data will assist StanWORKs in estimating the appropriate number of agents needed to answer the phones at any given time allowing the workforce to be best deployed to meet customer needs.

It is important to note that StanWORKs does have prior experience in utilizing contact center technology within the Medi-Cal and CalFresh programs. Last year, in partnership with County Strategic Business Technology (SBT) a contact center was implemented to pilot business processes in such a model. Results in this limited model were successful and supported movement to task-based case management producing some workload

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efficiencies. Staff learned to develop call scripts and adopted a team based case management approach to serving customers. This was a good first step in contact center technology, and CSA is ready to take the next steps towards full implementation adding CalWORKs, as well as Medi-Cal Aged, Blind, Disabled and Long-term Care (ABD/LTC) customer caseloads to the contact center model which supports movement to the C-IV platform at this time.

The current Cisco platform supported by SBT cannot interface with the C-IV technology which is critical to support customer authentication and speed the eligibility determination benefits process. Further, the existing StanWORKs contact center is county specific while the C-IV Contact Center will leverage resources and technology across the 39 county consortium which will position CSA to be responsive to Health Care Reform changes to Medi-Cal administration anticipated in 2014. In addition, as other C-IV counties move to the contact center platform it will be possible to consider regional approaches to certain program services that could expand partnerships for increased business efficiency and/or provide assistance during periods of emergency/disaster. CSA intends to continue the partnership with SBT and will maintain all current maintenance and operations support for the 40 agent platform by deploying the original SBT contact center infrastructure to other StanWORKs program areas including Intake and subsidized Child Care during Fiscal Year 2012-2013.

On November 1, 2011, as part of the County First Quarter Financial Report for Fiscal Year 2011-2012, the Board approved \$631,305 for the development of a Consortium IV (C-IV) Contact Center. The concept for the Contact Center was to provide centralized telephone support for customers seeking information and reporting changes. The concept of the Contact Center has now been augmented to adopt the existing platform currently in place in San Bernardino and in Kern County as of January 2012. This new model incorporates business process re-engineering to make maximum use of the technology and streamline/standardize worker interaction with the system for best customer response. Further, a Quality Assurance component provides for independent validation of the technology implementation to ensure timely and successful system implementation.

The revised Fiscal Year 2011-2012 estimate for all three project components is \$2.6 million, of which \$2.1 million will be expensed in Fiscal Year 2011-2012. The project is funded by StanWORKs allocations that do not require any additional county general fund beyond the annual MOE that has already been approved by the Board; existing appropriations are sufficient for all current year costs. The remainder of the project cost, approximately \$551,000 will be expensed over 4 years through Budget Year 2015-2016 to account for maintenance and operations support as well as the 5 year lease of fixed asset equipment from the Project, thereby saving CSA from any fixed asset purchases. These future year costs will be supported by ongoing annual State and Federal StanWORKs allocations.

The three (3) County Purchase Agreements with California Statewide Automated Welfare System (SAWS) Consortium IV (C-IV) are:

- ST-06-2011 Contact Center Technology Deployment \$2,163,197 – San Bernardino County (Accenture services) for hardware, software and recurring maintenance to deploy the contact center technology. This includes Interactive Voice Response (IVR), call routing configuration, web interaction, quality monitoring and workforce management tools.
- ST-07-2011 Business Process Assessment \$394,004 – San Bernardino (Accenture services) to conduct business process assessment of business practices to support the contact center business model re-engineering. This includes assistance in defining the new business model roles and responsibilities, definition of new processes, job training, script development and communication.
- ST-FDC-01-2012 Contact Center Technology Deployment \$74,706 – San Bernardino County (First Data Government Solutions services) to analyze the requirements and design and conduct independent testing of the solution in accordance with approved C-IV processes. First Data works with the Consortium and development contractor teams to establish and review milestones that ensure project timeliness and implementation through user acceptance testing and model office validation.

Once approved by the Board, the project will start in January 2012 with the arrival of the Business Process Assessment Team. This team will look at current business models, and assist the Agency to make business process changes while providing advice and direction for a communication plan. The communication plan will be targeted at our customer base, CSA staff, and existing partners in order to provide information, assistance and/or solicit input to the business process development. In February 2012 the Contract Center Technology staff will begin working on designing and building a call center platform based on Stanislaus County's unique needs. The tentative go-live date will be May 10, 2012 for the C-IV Contact Center to be operational.

As required by the Board of Supervisors on March 22, 2011, Attachment 1 includes those agreements where cumulative compensation paid exceeds \$100,000 in a three-year review beginning July 1, 2009 through June 30, 2012. CSA will identify any amendments to the agreements with San Bernardino for the Contact Center Project in future quarterly reports to the Board of Supervisors.

**POLICY ISSUE:**

Approval of the agreements between the Community Services Agency and the California Statewide Automated Welfare System (SAWS) Consortium IV (C-IV) Joint Powers

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Authority for County Purchases ST-06-2011, ST-07-2011 and ST-FDC-01-2012 for the C-IV Contact Center Project for Fiscal Year 2011-2012 support the Board's priority of Effective Partnerships and Efficient Delivery of Public Services improving the efficiency of services to our community customers.

**STAFFING IMPACT:**

Existing Community Services Agency staff is available to support the implementation of the Agency Contact Center Deployment.

**CONTACT PERSON:**

Christine C. Applegate, Director 558-2500

**Contract Summary Sheet  
All Funds  
Contracts over \$100,000**

Attachment 1

Budget Unit	Contractor	Brief Description of Service Provided or Position Held	Previous Contractual Amount and Period	Proposed Contract Amount and Period	Cumulative Contract Total
Community Services Agency	San Bernardino County	Contact Center Technology Deployment	\$631,305 11/1/11-6/30/12	\$1,531,892 1/11/12-6/30/14	\$2,163,197
Community Services Agency	San Bernardino County	Business Process Assessment	N/A	\$394,004 1/11/12-6/30/12	\$394,004
Community Services Agency	San Bernardino County	First Data Government Solutions	N/A	\$74,706 1/11/12-6/30/12	\$74,706

Note: Contract totals listed that are less than \$100,000 represent separate contracts where the total contracted services with vendor exceed \$100,000

*California SAWS Consortium IV*



**County Purchase ST-06-2011  
Stanislaus County - Contact Center Technology  
Deployment**





## I. Overview:

Pursuant to Section 6.11 of the Amended and Restated Revised System Agreement between the California SAWS Consortium IV Joint Powers Authority ("CIV") and Accenture LLP and Proquire, LLC, with an effective date of June 29, 2007 (as amended, the "Agreement"), Stanislaus County ("Stanislaus") would like utilize C-IV Contact Center services. The scope of the Project consists of services, hardware, software and recurring maintenance and production support charges, as further described in this County Purchase order.

The scope of the Contact Center Project and this County Purchase consists of the following:

- Costs associated with the Services required to deploy the Contact Center technology within Stanislaus' Contact Center for 65 workers, including the following:
  - IVR Menuing - Configuration and deployment of county specific menuing to triage customer intent and provide the appropriate transfer logic to agents (this will not include any additional self-service functionality).
  - Call Routing - Configuration and deployment of Routing logic and agent skill group definitions for up to 12 call types with appropriate queuing and messaging treatments.
  - Web Interaction Routing - Configuration and deployment of Web chat routing to agents supporting C4Yourself.
  - Computer Telephony Integration (CTI) - Deployment of CTI softphone and transfer logic to agent desktops to support telephony.
  - Reporting - Deployment of reporting platform for Stanislaus to create reports to manage the Contact Center.
  - Quality Monitoring - Configuration and deployment of Call and Screen recording, search and retrieval, and performance management software.
  - Workforce Management - Configuration and deployment of agent scheduling and staffing application.
  - Telephony - Configuration and deployment of telephony and voice messaging.
- Cost associated with Equipment and Software for the above capabilities.
- Production Operations charges (WAN Administration and central support).

Migrating to the Contact Center model requires both business process and technology transformation efforts. The business process transformation is not in the scope of this County Purchase as the County will own the effort around definition of the new business model, definition of roles and responsibilities, definition of new processes, job training, call script development, change management, and communication. As part of aligning the technology capability to the business processes, assistance will be provided to the county for the following:

- Facilitation of the creation the inventory of customer interactions.
- Providing templates for defining and documenting the processes and call scripts for those interactions.
- Assistance defining test plans for the business processes and the technology for call scripts and interactions.
- Assistance with management and documentation of outcomes of the model office testing.



Approach:

The approach to delivering the capabilities described above includes Planning, Analysis, Design, Build, Test and Deploy of the contact center technology components. The specific timeframes, activities and responsible parties are listed in Table 1.0 below:

Table 1.0 - Project Schedule

Activity	Start	Finish
<b>Signed County Purchase and approved APD</b>	<b>1/13/2012</b>	<b>1/13/2012</b>
<b>Contact Center Technology Deployment</b>	<b>2/6/2012</b>	<b>5/10/2012</b>
Plan	2/6/2012	2/17/2012
Design	2/20/2012	3/23/2012
Build	3/26/2012	4/6/2012
Local Infrastructure Deployment	3/26/2012	4/13/2012
System Test	4/9/2012	4/13/2012
Independent Test	4/16/2012	4/27/2012
Scheduling Support	4/23/2012	5/25/2012
Model Office	4/30/2012	5/10/2012
Support	5/11/2012	5/25/2012

The County will be responsible for several milestones to enable the above project schedule.

Table 2.0 - County Milestones

#	Milestones for Which County is Responsible	Date
1	MPOE/MDF Ready for Circuit Installation	1/6/2012
2	Finalize Call Types	2/17/2012
4	Finalize IVR Call Flow	3/5/2012
5	Server Room Ready for Equipment	2/20/2012
6	Facility ready for Workstation and Phone Deployment	3/30/2012
7	Receive any County-procured Equipment	3/23/2012
8	Finalize Agent Processes	4/27/2012
9	Complete Model Office Script Development	4/27/2012
10	Hire Workers and Group into Teams	4/27/2012
11	Train Workers on Processes	5/10/2012
12	Go-Live	5/11/2012



Assumptions:

#	Assumption
<b>Timeframe Assumptions:</b>	
1	Stanislaus County must approve this County Purchase and provide the corresponding approved Advance Planning Document (APD) by January 13, 2012. Otherwise, the estimates provided in this County Purchase will not be valid and a new County Purchase will be required.
<b>Technology Assumptions:</b>	
2	Estimates for deploying the Contact Center Technology within Stanislaus' Contact Center are based on 65 workers.
3	Call recording / quality monitoring solution will record 20% of all transactions for training and quality purposes. Recordings will be kept online for 30 days.
4	Existing DS3 and DSL backup lines at the Contact Center facility will be used for data connectivity for CTI, access to C-IV, and routing calls to the IVR.
5	Four (4) T-1 PRI lines will provide 92 lines for the 65 workers and IVR usage. Contractor will re-examine this after go-live and discuss the addition of more lines with Stanislaus County if necessary.
6	Toll Free rate is \$.03/min. The total volume of toll free minutes used by the contact center each month is assumed at 120,509.
7	Long Distance rate is \$.02/min. The total volume of long distance minutes used by the contact center per month is assumed at 6,025.
<b>Design, Test and Deployment Assumptions:</b>	
8	Sixty-seven (67) new workstations will be purchased for the contact center facility. Of this quantity, sixty-five (65) workstations are intended for use by workers and the remaining two (2) for the Agent Statistics displays.
9	Stanislaus County is responsible for setup of the contact center facility including, but not limited to: furniture, electricity, HVAC, and data/electrical cabling. Contractor is responsible only for infrastructure required for the IVR System, Call Routing and Operations, PCs and phone deployment. See County Milestones #1, #5 and #6 in Table 2.0, Section 1 of the County Purchase for due dates.
10	Stanislaus County will be responsible for the purchase and installation of two (2) LCD screens for the Agent Statistics wall displays. County staff will also be responsible for purchasing and installing video cables that run from the two Agent Statistics workstations to the two LCD screens. All County-procured equipment must be setup and installed for County Milestone #7 (see Table 2.0 - County Milestones, Section I of the County Purchase for due date).
11	Total devices to be deployed includes up to 67 workstations and 65 phones. The estimate provided assumes that the deployment will be done simultaneously (i.e. desk and phone at the same time). If the installation is to be conducted separately, additional charges will be incurred. Contractor will not be responsible for deploying any scanners.
12	Self-service capabilities will be limited to existing and project-planned Inbound and Outbound IVR capabilities for Stanislaus County. Capabilities are detailed in the IVR Plan Document (Deliverable IVR001 – IVR Plan). Any additional self-service needs will be a separate SCR and/or County Purchase. Menu structure, options and initial triage and transfer out capabilities will be provided as part of the county specific business logic.
13	No changes to Computer Telephone Integration (CTI) will be made.



14	Stanislaus County staff will be responsible for determining the call types and IVR call flow for the Contact Center. Call types and IVR call flow must be finalized for County Milestones #2 and #4, respectively (see Table 2.0 - County Milestones, Section I of the County Purchase for due dates).
15	Technology training will be conducted at the contact center facility based on training queues on the production call routing instances. Facilities and space will be provided by the County. This will be a one-time effort and recurring technology training will be the responsibility of the County; trainers should attend the one-time training.
16	Development and testing estimates do not include User Acceptance Testing.
17	Any requested changes to the deployment schedule may result in additional Services charges and will require the execution of a new County Purchase. The daily rate for delaying deployment is \$6,080 during SFY 11/12, and \$6,272 during SFY 12/13.
18	County will complete County Milestones referenced in Table 2.0 - County Milestones in Section I of the County Purchase.
19	The estimate includes weekly enhanced status reporting for the 16-week duration of the Contact Center Project.
	<b>Model Office Assumptions:</b>
20	Model Office scope will provide supplemental staffing for Contractor resources to assist Stanislaus County with development of the following: <ul style="list-style-type: none"> <li>- Development of Customer Interaction Inventory</li> <li>- Development of up to 12 Call Handling Processes and Scripts</li> <li>- Development of up to 12 Operational Monitoring and Supervisory Processes and Scripts</li> <li>- Up to 12 Interaction Scenarios and Test Plans</li> <li>- Test Environment Preparation for Testing Model Office Interaction Scenarios</li> <li>- Assistance with Execution of up to 12 Model Office Test Scenarios</li> </ul>
21	Model Office script development will be the responsibility of Stanislaus County and will be available for County Milestone #9 (see Table 2.0 - County Milestones, Section I of the County Purchase for due date).
22	Model Office testing will leverage the production instance of the Cisco Telephony, Call Routing, Quality Monitoring, Workforce Management and Reporting environments with application integration (CTI) screen pops integrated to the C-IV PRT application environment. Data preparation and maintenance will not be required within the C-IV PRT Environment to support Model Office Test efforts.
23	Resources to execute the Model Office Test scenarios and plans will be provided by Stanislaus County. It is assumed that at least two dedicated representatives will be fully engaged to execute each Model Office scenario. Each Model Office Scenario will be limited to two conducts within the nine business-day scope of Model Office Testing.
24	Business process changes as a result of Model Office testing will not alter the technology deployment schedule. Modifications to business processes post Model Office testing will be reviewed and may require a new County Purchase for Services. Changes would be developed and implemented following the completion of the technology deployment. Any technology defects (where the solution built is in conflict 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.
25	Stanislaus County, with assistance from Contractor, will be responsible for development of Business Processes, Operating Procedures, and Performance Management Metrics. Processes and Procedures must be completed for County Milestone #8 (see Table 2.0 - County Milestones, Section I of the County Purchase for due date).



26	Stanislaus County will be responsible for development and delivery of Agent, Supervisor and Business Process Training, change management and communication in support of the contact center Deployment. All training must be completed for County Milestone #11 (see Table 2.0 - County Milestones, Section I of the County Purchase for due date).
27	The reporting, quality monitoring, and workforce management solutions for the contact center are used by county Contact Center management and operations personnel to administer the Contact Center. Contractor will set up accounts for reporting, quality monitoring, and workforce management for county Contact 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.
<b>Hardware Installation Assumptions:</b>	
28	Equipment will be installed Monday through Friday, between the hours of 8:00 a.m. and 5:00 p.m., with the exception of County holidays.
29	Equipment will be transported to the Stanislaus County for installation.
30	Existing equipment will be de-installed, packaged securely, and transported to a County-provided location.
31	Equipment will be un-packaged and all necessary cables and cords will be connected.
32	Remote Hardware Maintenance Technicians (RHMTs) will use existing power strips (new power strips will not be provided).
33	New workstations will be booted up and joined to the existing domain with a new workstation ID as defined by the C-IV Network team. Files will be transferred from the server.
34	Installation will be verified by having the User log in and access the C-IV Application through Microsoft Internet Explorer, as well as the having the user place an outbound call leveraging the agent headset and phone.
35	If the User is not available at the time of de-installation, the RHMTs will need to return to this cubicle at the end of the day, or on another day at the end of the installs (if not returning to that site the next day).
36	Peripheral County equipment (i.e., PDA's, speakers) will not be connected by the RHMTs.
37	The RHMTs will have spare equipment in the event that there is a defective phone, headset, workstation, monitor or mouse.
38	Any defective equipment will be brought back to the Central Depot by the RHMTs, and that team will confirm it gets replaced by the vendor.
<b>Operations Assumptions:</b>	
39	All contact center application and infrastructure managed services will be part of Tier 3 services for the system availability SLA. IVR is already a component of Tier 3.
40	Stanislaus County will be responsible for monthly recurring production operations charges for central support and WAN Administration. <ul style="list-style-type: none"> <li>• Production operations charges for central support of agents and remote workstation maintenance will commence May 2012 and run through the end of the Agreement, October 2013. Support charges are based on number of workers live on the solution.</li> <li>• Production operations charges for WAN Administration will commence March 2012 and run through October 2013.</li> </ul>
<b>General Assumptions:</b>	
41	The Total Cost is an estimate and is subject to changes at the time of ordering. The estimate includes shipping/handling and taxes as appropriate. The final cost will be provided to the Consortium at the time of invoicing.



42	Stanislaus County will be responsible for one-time Services charges for technology deployment. Services charges will be invoiced as payment milestones per the schedule set forth in Section IV of the County Purchase.
43	Status of the project schedule will be available to the County upon request.
44	New hardware will initially be sent to the warehouse in Rancho Cordova, California for asset tagging and will later transported to Stanislaus County.
45	Taxes for hardware items were estimated at 8.75% and based on the initial shipping location of Rancho Cordova, California.
46	Ownership of central Equipment such as servers, switches, routers, storage devices and UPS units will reside with the Consortium.
47	Ownership of all software purchased under this County Purchase will reside with the Consortium.
48	All hardware with a unit price exceeding \$5,000.00 will be leased at an interest rate of 11.9% for 60 months. Although the Agreement currently ends in October 2013, the total charges for this County Purchase include all remaining lease payments that run beyond the October 2013 in order to show the total charges associated with the lease agreements. These remaining lease payments will continue to be incurred during the appropriate months in future State Fiscal Years.
49	The outbound IVR system supports English and Spanish languages only.
50	All Equipment, with the exception of HP printers, is purchased with 4-year maintenance agreements from the date of purchase (unless noted otherwise). Once the hardware support agreements have expired, the County will be responsible for funding any hardware refreshes or hardware support renewals through the execution of a separate County Purchase.
51	All HP Printers are purchased with 3-year maintenance agreements from the date of purchase (unless noted otherwise). Once the hardware support agreements have expired, the County will be responsible for funding any hardware refreshes or hardware support renewals through the execution of a separate County Purchase.
52	All software licenses, with the exception of CA Integrated Threat Manager, are purchased with 4-year maintenance agreements from the date of purchase (unless noted otherwise). Once the software support agreements have expired, the County will be responsible for funding any software refreshes or software support renewals through the execution of a separate County Purchase.
53	All CA Integrated Threat Manager licenses are purchased with 3-year maintenance agreements from the date of purchase (unless noted otherwise). Once the software support agreements have expired, the County will be responsible for funding any software refreshes or software support renewals through the execution of a separate County Purchase.
54	San Bernardino County purchased the central equipment that enabled the contact center technology and also funded the equipment support agreements through the end of the Agreement. If Stanislaus County still would like to continue utilizing the C-IV Contact Center technology when the support agreements end in SFY 14/15, Stanislaus County would be responsible for funding its share of renewing the support agreements or the technical refresh if the Consortium does not have the available funding.



**II. Schedule:**

The charges associated with this County Purchase will be incurred during State Fiscal Years 2011/12 through SFY 2013/14.

**III. Total Cost:**

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

Total County Purchase Charges	SFY 2011/12	SFY 2012/13	SFY 2013/14 (6/2013 - 10/2013)	Lease Payments (11/2013 onwards)	Total Cost
<b>Services</b>	<b>\$845,677</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$845,677</b>
One Time Service Charges	\$845,677	\$0	\$0	\$0	\$845,677
Recurring Service Charges	\$0	\$0	\$0	\$0	\$0
<b>Hardware and Software Charges</b>	<b>\$729,941</b>	<b>\$41,625</b>	<b>\$17,344</b>	<b>\$135,280</b>	<b>\$924,190</b>
Hardware Charges	\$151,546	\$41,625	\$17,344	\$135,280	\$345,794
Hardware Maintenance and Support Charges	\$32,798	\$0	\$0	\$0	\$32,798
Software Charges	\$341,850	\$0	\$0	\$0	\$341,850
Software Maintenance and Support Charges	\$203,747	\$0	\$0	\$0	\$203,747
<b>Production Operations Charges</b>	<b>\$36,476</b>	<b>\$250,845</b>	<b>\$106,010</b>	<b>\$0</b>	<b>\$393,331</b>
One Time Charges	\$3,892	\$0	\$0	\$0	\$3,892
Recurring Charges	\$32,584	\$250,845	\$106,010	\$0	\$389,439
<b>Facilities</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Total Charges</b>	<b>\$1,612,094</b>	<b>\$292,469</b>	<b>\$123,354</b>	<b>\$135,280</b>	<b>\$2,163,197</b>



**IV. Milestone Schedule:**

The following table outlines the charges and invoicing timelines for Payment Milestones associated with Services.

Milestone Number	Description	Due Date	Price	SFY 2011/12	SFY 2012/13	SFY 2013/14
1	Contact Center Technology Deployment - Plan Complete	2/17/2012	\$253,703	\$253,703		
2	Contact Center Technology Deployment - Build Complete	4/6/2012	\$253,703	\$253,703		
3	Contact Center Technology Deployment Complete	5/10/2012	\$338,271	\$338,271		
<b>TOTAL</b>			<b>\$845,677</b>	<b>\$845,677</b>	<b>\$0</b>	<b>0</b>

Milestone #1 - Technology Deployment - Plan Complete consists of the following documentation:

- Project Schedule
- Requirements
- High Level Design Description
- Training Approach
- Testing Approach

Milestone #2 - Technology Deployment - Build Complete does not consist of any paper deliverables.

Milestone #3 - Technology Deployment Complete consists of the following:

- IVR Menuing Build & Test Complete
- CTI, Call/Web Routing Build & Test Complete
- Reporting Build & Test Complete
- QM Build & Test Complete
- WFM Build & Test Complete
- System Testing Complete
- Technology Training Delivered





COUNTY PURCHASE APPROVAL

**Subject:** County Purchase - ST-06-2011

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

**Stanislaus County**

By: *Christine C. Applegate*  
Printed Name: Christine C. Applegate  
Title: Director  
Date: 1/11/12

Notice Address:  
CSA Stanislaus  
251 E. Hackett Road  
Modesto, CA 95358

APPROVED AS TO FORM:  
STANISLAUS COUNTY COUNSEL  
BY *[Signature]*  
DATE: 12/23/11

**SAWS CONSORTIUM-IV JOINT POWERS AUTHORITY**

By: *[Signature]*  
Printed Name: John Boule  
Title: C-IV Project Director  
Date: 1/18/12

Notice Address:  
SAWS Consortium-IV Joint Powers Authority  
Attention: C-IV Project Director  
11290 Pyrites Way, Suite 150  
Rancho Cordova, CA 95670-4481

**County Of Stanislaus**  
By: *[Signature]*  
Keith B. Boggs  
Title: Deputy Executive Director  
GSA Director/Purchasing Agent  
Date: \_\_\_\_\_

# *California SAWS Consortium IV*



## **County Purchase ST-07-2011 Stanislaus County - Business Process Assessment**



## I. Overview:

Stanislaus County Community Services Agency ("CSA") seeks services to conduct an assessment of business processes related to eligibility customer programs to determine whether and what efficiencies can be gained from standardizing business processes, as well as a redesign of some business processes at CSA's existing Benefit Center and Call Center.

CSA leadership desires to standardize business processes across program offices, improve worker efficiencies and thereby improve customer outcomes. The goal of this office assessment is to identify and develop process changes, implementation plans, and ownership assignments for CSA to effect changes to how work is conducted across related program offices (defined in Scope of Work, below).

Additionally, CSA leadership desires to review the business processes currently in use at its Benefit Center and Call Center in order to prepare for the potential change to the C-IV Contact Center Technology.

### Scope of Work

Contractor will conduct an assessment of county business processes and prepare recommendations for implementing changes in accordance with the scope outlined in Appendix 1, Statement of Work. The Statement of Work includes a description of programs, offices, work products, and timelines.

### Assumptions:

- The Total Cost is an estimate and is subject to changes at the time of ordering. The final cost will be provided to the Consortium at the time of invoicing.
- Total Cost is inclusive of all labor and out-of-pocket expenses.
- A maximum of 2,069 hours will be worked.
- Stanislaus County must approve this County Purchase by January 10, 2012. All appropriate approvals must be received by January 10, 2012 in order for this work effort to commence on January 11, 2012.
- The CSA County Executive Leadership team directing this consulting work are:
  - Christine Applegate, Director
  - Jan Viss, Interim Assistant Director
  - Patrice Dietrich, Assistant Director, Finance and Operations
  - Sysvahn Kabkeo, Manager IV, StanWORKs
  - Keira Vink, Manager III, StanWORKs, Project Lead
  - Sharon Smithcamp, Manager IV, Information Technology
- CSA Managers, Supervisors, and staff will be made available to meet with consultants as needed to conduct the assessments on a scheduled basis, with advance notice of two weeks.



- The CSA Executive Leadership team will communicate to Managers and Supervisors and make them and their office staff available to consultants as needed for the scheduled weeks of business process assessment.
- Communication channels and messages for staff will be created and distributed by CSA.
- Clerical support such as copying and distribution of electronic and hard copy materials, scheduling meetings with CSA staff, and other office support will be provided by CSA.
- Contractor will provide two full-time analysts, one manager, and one part-time account executive to conduct this work for the timeframe specified.
- Prices and staffing are based on a start date of January 11, 2012 and an end date of May 2, 2012. Any changes to these dates might affect pricing and staffing. Revisions to scope must be mutually agreed upon by the parties and executed as a change order to this County Purchase.
- In order to meet the timelines for work products, Contractor staff will require access to local office managers, supervisors, and staff for input into As-Is and To-Be assessments throughout each workday, Monday-Friday, for each week shown on the Project Timeline. If appropriate staff are not available during the time of the office assessment, the work products will be limited to the amount of information that can be collected during the time that is available to meet with staff.
- Services charges will be invoiced as Payment Milestones; Milestones will be invoiced upon submission of Monthly Status Reports to the CSA Executive Leadership Team.



**II. Schedule:**

The charges associated with this County Purchase will be incurred during State Fiscal Year 2011/2012. The Project will commence no earlier than January 11, 2012 and conclude no later than May 2, 2012.

**III. Total Cost:**

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

Total County Purchase Charges	Total Charges	SFY 2011/12
<b>Services</b>	<b>\$394,004</b>	<b>\$394,004</b>
<b>Hardware and Software Charges</b>	<b>\$0</b>	<b>\$0</b>
Hardware Charges	\$0	\$0
Hardware Maintenance and Support Charges	\$0	\$0
Software Charges	\$0	\$0
Software Maintenance and Support Charges	\$0	\$0
<b>Production Operations Charges</b>	<b>\$0</b>	<b>\$0</b>
One Time Charges	\$0	\$0
Recurring Charges	\$0	\$0
<b>Total Charges</b>	<b>\$394,004</b>	<b>\$394,004</b>

**IV. Milestones:**

The following table outlines the charges and invoicing timelines for Payment Milestones associated with Services.

Milestone Number	Description	Due Date	Price	SFY 2011/12
1	Monthly Status Report - January 2012	2/7/2012	\$115,000	\$115,000
2	Monthly Status Report - February 2012	3/7/2012	\$106,000	\$106,000
3	Monthly Status Report - March 2012	4/6/2012	\$104,000	\$104,000
4	Monthly Status Report - April 2012	5/2/2012	\$69,004	\$69,004
<b>TOTAL</b>			<b>\$394,004</b>	<b>\$394,004</b>



COUNTY PURCHASE APPROVAL

**Subject:** County Purchase - ST-07-2011

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

**Stanislaus County**

By: Christine C. Applegate  
Printed Name: Christine C. Applegate  
Title: Director  
Date: 1/11/12

Notice Address:  
CSA Stanislaus  
251 E. Hackett Road  
Modesto, CA 95358

APPROVED AS TO FORM:  
STANISLAUS COUNTY COUNSEL  
BY [Signature]  
DATE: 12/23/11

**SAWS CONSORTIUM-IV JOINT POWERS AUTHORITY**

By: [Signature]  
Printed Name: John Boule  
Title: C-IV Project Director  
Date: 1/18/12

Notice Address:  
SAWS Consortium-IV Joint Powers Authority  
Attention: C-IV Project Director  
11290 Pyrites Way, Suite 150  
Rancho Cordova, CA 95670-4481

County Of Stanislaus  
By: [Signature]  
Keith B. Boggs  
Title: Deputy Executive Officer  
GSA Director/Purchasing Agent  
Date: \_\_\_\_\_



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Appendix A – Statement of Work

**Stanislaus County  
Community Services Agency  
Business Process Assessment  
Statement of Work**

December 20, 2011

Accenture



## **Introduction to Project Purpose**

Stanislaus County Community Services Agency (CSA) seeks services to:

- 1) Conduct an assessment of business processes related to eligibility customer programs to determine:
  - a) What efficiencies can be gained from streamlining business processes and
  - b) Where there are opportunities to standardize business processes across offices, and
- 2) Conduct a business process redesign of some processes at the Call Center and the Benefit Center. CSA operates two public facing service centers: Benefit Center and Call Center. The Benefit Center is staffed with Eligibility Workers who respond to requests from participants. The Call Center is staffed with clerical workers who provide information to participants.

## **Project Goals**

CSA leadership desires to standardize business processes across program offices, improve worker efficiencies and thereby improve customer outcomes. The goal of this office assessment is to identify and develop process changes, implementation plans, and ownership assignments for CSA to effect changes to how work is conducted across related program offices (defined in Scope of Work, below). Specific objectives will be developed with CSA management input, and these objectives will be set up to be measured by CSA upon implementation by the County in each office.

In preparation for potential contact center technology platform change, CSA desires to review the business process used at its Benefit Center and Call Center.

## **Scope of Work**

Accenture will provide consultants with process improvement, organizational design, and implementation experience to work with CSA staff and leadership to conduct the following work. Accenture will conduct an assessment of business processes and will prepare recommendations for implementing changes.

**Timeframe:** The targeted timeframe to conduct the work is January 11, 2012 through May 2, 2012.

**Included Programs:** The following programs and functions are included in this assessment:

- CalWORKs Eligibility
- CalFRESH Eligibility
- Medi-Cal Eligibility
- Clerical services related to above programs
- Benefit and Call Center processes

Intake processes are the main focus for CalWORKs, CalFRESH, and Medi-Cal eligibility, to find variations in service delivery method, verification processes and standardize the work across all offices.

CSA desires to use same day case processing at all offices, and to make sure that it is being conducted uniformly in all offices, to prohibit customers from having a different experience at each office.

Continuing work is focused in the Benefit Center for Medi-Cal and CalFresh and in the Benefit Center or individual caseload model for CalWORKs all located at the Main office, Hackett.

CSA desires recommendations for options to reconfigure the customer flow within the reception area at the Main office in order to improve traffic flow and efficiencies.

**Note that Welfare to Work is not included.**

**Included Offices:** The following offices are included in this assessment are listed below. The appropriate Managers and Supervisors are listed with each office.

<i>Office Name</i>	<i>CSA StanWORKs Manager</i>	<i>CSA StanWORKs Supervisor</i>
Scenic	Maria DeAnda	Margaret Garcia
West Modesto	Maria DeAnda	Margaret Garcia
Hughson	Evelyn Genn	Debbie Gutierrez
East County (Oakdale)	Evelyn Genn	Jeannie Custer
West Side (Patterson)	Evelyn Genn	Bertha Gutierrez
Turlock I	Evelyn Genn	Debbie Gutierrez, Gus Maldonado, Jacqueline Trujillo
Turlock II	Evelyn Genn	Charlotte Parga

The work to be conducted is as follows:

- 1) Facilitation of one Executive Leadership team meeting to plan for engagement of the CSA Office Managers and Supervisors who will be included in the assessment. At this meeting, we will define the processes for making decisions for the duration of this project, and define any escalation processes. We will determine the frequency and timing of Executive Leadership team review meetings, and set future meeting dates and times. Finally, we will determine communication strategies and processes for setting expectations with CSA Managers and Supervisors in the StanWORKs Division. We will decide upon a method for CSA to develop messages and channels for CSA dissemination of communications for the duration of project.
- 2) Facilitation of up to 3 meetings with the Management Team to prepare for and discuss the plans for the office assessments.
- 3) Facilitation of up to 7 meetings with the Executive Leadership team to review interim progress of the business process analysis, and final results. During these meetings, the Executive Leadership team will discuss and decide upon approaches for the following topics. These meetings will be documented by the Accenture team, and the decisions made will be included in the Final Implementation Plan.
  - a. Communication of goals to supervisors line staff

- b. Methods and timelines the implementation of changes
  - c. Development of policies and procedures to support changes
  - d. Identification of staff training needs
- 4) Review and Assessment of Case Processes
- a. Business Process Assessment of each of the offices identified above. There are up to 42 To-Be business processes which will be assessed in each of the 7 offices, shown in Appendix 1. The assessment consists of a review of As-Is business processes, at an office-wide level, and documentation of process flow charts (see sample in Appendix 2), analyzed for related use of processes and features of the C-IV system. The inputs used will be a combination of CSA's existing business process flow charts and interviews of office supervisors/staff to validate flows. To-Be processes will be created across all offices assessed and documented in one master Change Discussion Guide (see Appendix 4 for sample). This will be the standard set of business processes used for implementation by all StanWORKs Division offices at CSA.
  - b. Process flows involving a Call Center, Imaging and IVR processes will be included in the To-Be process flows. (See Appendix 1, #58 for full description of process).
  - c. Development of recommendations for the implementation of business process changes in the offices assessed, with targeted timelines for implementation, will be documented in a final report. Accenture will recommend timeframes and mechanisms for implementation and measurement of objectives for use by CSA. This will include objectives for each office to measure their implementation progress against the targeted timeframes (such as number of change discussions to be held in each office, number of business processes to be adopted in each office, etc., by what date). The final report will include recommendations for assignment of ownership of action items. The support of the implementation is not part of this initial scope of work, but can be added as a new scope of work.
- 5) This assessment will include an inventory, documentation, and assessment of the Benefit Center and Call Center processes. Recommendations for To-Be processes will be developed for the Benefit and Call Center processes.
- 6) This assessment will include recommended workflow of reception areas to improve traffic flow and efficiencies.

### Work Products and Timelines

Work Product	Description	Timeline
Monthly Status Reports*	Cumulative Report of activities conducted throughout the month, including a record of decisions and action items, will be submitted within 2 days following the last calendar day of each month.	<ol style="list-style-type: none"> <li>1. January 31, due February 2, 2012</li> <li>2. February 29, due March 2, 2012</li> <li>3. March 31, due April 2,</li> </ol>

		2012 4. April 30, due May 2, 2012
Executive Engagement Plan	Plan and schedule to engage Managers and Supervisors in the offices to be assessed.	January 31, 2012
Executive Leadership Team and Management Team Engagement Meetings and Documentation	Incremental meetings to engage and report interim and final results progress: Agendas, facilitation and minutes provided.	January 11 – April 30, 2012
Business Process Assessments	As-Is process flow diagrams for the Benefit and Call Center processes.	February 17, 2012
Business Process Assessments	Recommended process changes for the Benefit Center and Call Center processes.	March 9, 2012
Business Process Assessments	As-Is process flow diagrams for each of the offices.	March 20, 2012
Change Discussion Guide (CDG) and Initial Implementation Plan	CDG identifying process changes (from As-Is to To-Be) and plans for process changes for each office assessed. Includes assignment of ownership of action items, and methods for measurement.	April 10, 2012
Out-Brief meeting and revisions to Initial Implementation Plan	Summary of work conducted and Final Implementation Plan including high level review of actions completed and ownership of actions to be completed	April 30, 2012

## Assumptions

1. The CSA County Executive Leadership team directing this consulting work are:
  - a. Christine Applegate, Director
  - b. Jan Viss, Interim Assistant Director
  - c. Patrice Dietrich, Assistant Director, Finance and Operations
  - d. Sysvahn Kabkeo, Manager IV, StanWORKS
  - e. Keira Vink, Manager III, StanWORKS, Project Lead
  - f. Sharon Smithcamp, Manager IV, Information Technology
2. CSA Managers, Supervisors, and staff will be made available to meet with consultants as needed to conduct the assessments on a scheduled basis, with advance notice of 2 weeks.
3. The CSA Executive Leadership team will communicate to Managers and Supervisors and make them and their office staff available to consultants as needed for the scheduled weeks of business process assessment.
4. Communication channels and messages for staff will be created and distributed by CSA.

5. Clerical support such as copying and distribution of electronic and hard copy materials, scheduling meetings with CSA staff, and other office support will be provided by CSA.
6. Accenture will provide two full-time analysts, one manager, and one part-time account executive to conduct this work for the timeframe specified.
7. Prices and staffing are based on a start date of January 11, 2012 and an end date of May 2, 2012. Changes to these dates might affect pricing and staffing. Revisions to scope must be mutually agreed upon by the parties and executed as a change order to this County Purchase.
8. In order to meet the timelines for work products, Accenture needs access to local office managers, supervisors, and staff for input into As-Is and To-Be assessments throughout each workday, Monday-Friday, for each week shown on the Project Timeline. If appropriate staff are not available during the time of the office assessment, the work products will be limited to the amount of information that can be collected during the time that is available to meet with staff.

**Appendix 1. List of Included To-Be Processes**

<b>To-Be Process List</b>			
<b>#</b>	<b>Category</b>	<b>Process</b>	<b>Brief Description</b>
1	General	Document Generating and Printing	The process for generating and printing documents.
2	General	Index Imaged Documents	The process to index imaged documents.
3	General	Process Incoming Mail	The process to handle incoming mail, including the barcode scanning and imaging of documents.
4	General	Case Reassignment	The process for reassigning a case.
5	General	Notices of Action (NOAs)	The process for reviewing NOAs for correctness and for issuing manual NOAs as necessary.
6	Up Front	Record Customer Contact	The process to record contact (in-person or via phone) with a Customer. <b>Note: CSA uses standard templates here.</b>
7	Up Front	Document Drop-Off or Pick-Up	The process to handle documents that are dropped off or picked up by Customers at reception. This process does not apply to New Applications or any Fiscal processes.
8	Up Front	New Applications	The process to handle new applications for programs. This includes the screening and case worker assignment. This also includes handling E-Applications from C4Yourself.
9	Up Front	Intake Schedule Maintenance	The process for maintaining a schedule of available Intake Appointments.
10	Up Front	Appointments	The process to schedule or reschedule Customers for appointments.
11	Resource Databank	Resource Databank	The processes of searching and maintaining the online database of Service Providers, Job Orders, and Organizations. "Organizations" include Foster Care facilities, money management vendors, legal agencies, and schools.
	<b>DO NOT INCLUDE</b>		
12	Eligibility	Intake Interview	The process for conducting an intake interview. This includes determining eligibility, authorizing benefits, generating notifications and collecting verifications.
13	Eligibility	Medi-Cal Application Without Interview	The process for handling a mail-in Medi-Cal application.
14	Eligibility	Refer to Employment Services	The Eligibility Worker's process for referring a case to Employment Services.
15	Eligibility	Diversion Payments	The process to determining the eligibility and make a payment for Diversion.
16	Eligibility	Inter-County Transfers In	The process for processing cases that transfer into the county.
17	Eligibility	Direct Deposit	The process for setting up a Direct Deposit Account.

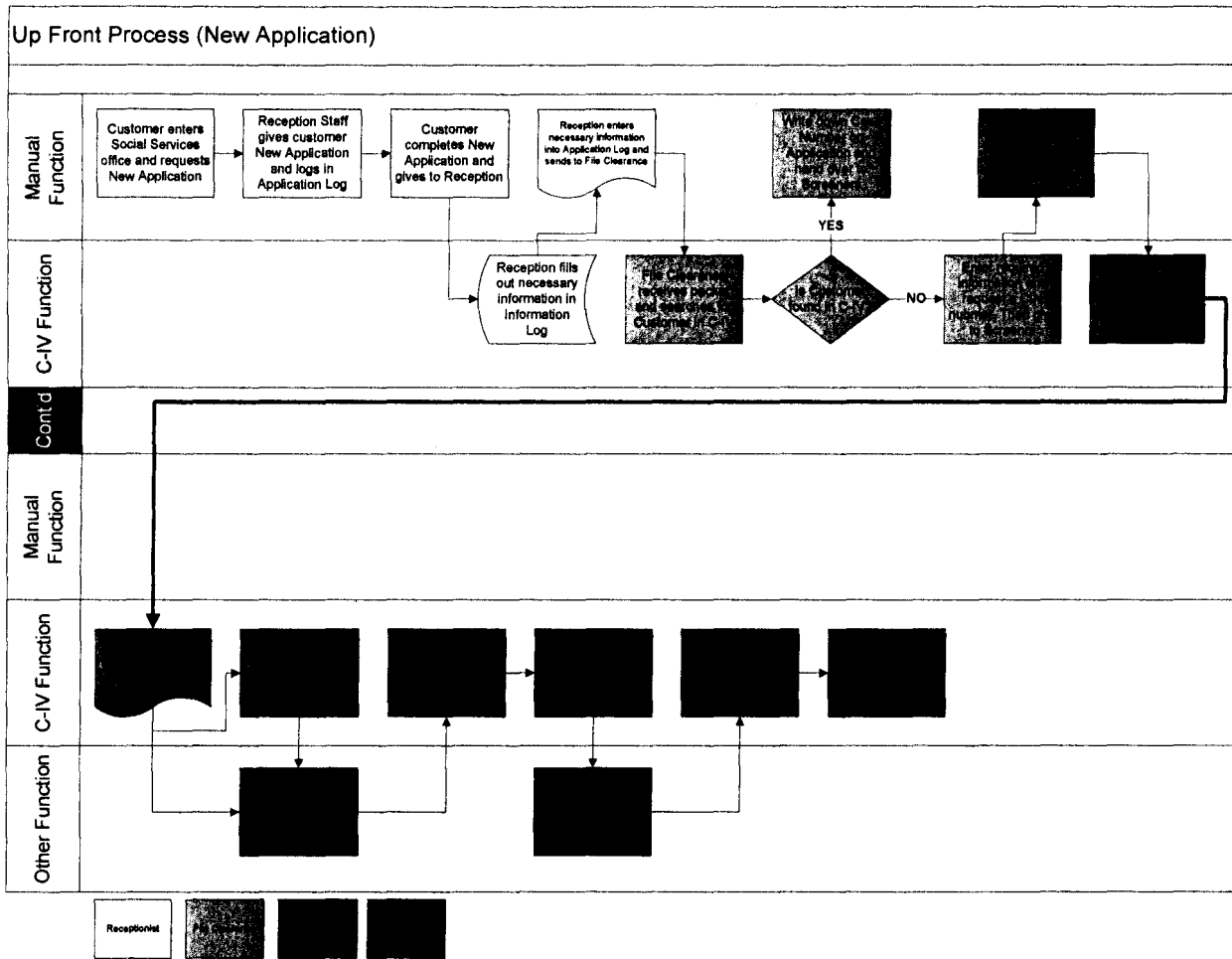
18	Eligibility	Immediate Need and Expedited Food Stamps	The process for processing Immediate Need or Expedited Food Stamps applications
19	Eligibility	EBT Card Account	The process to establish an EBT Card Account.
20	Eligibility	Add Additional Programs/Persons	The process for adding additional programs or persons.
21	Eligibility	Supervisory Authorization	The process for a Supervisor to review a case.
22	Eligibility <b>DO NOT INCLUDE</b>	Able Bodied Adults Without Dependents (ABAWD)	The process for handling FS cases with ABAWD individuals. This includes ABAWD tracking.
23	Eligibility	FSET	The process for FSET referrals and tracking. Includes SFIS Process.
24	Eligibility	Time Limits/Time Clock Reviews	The process for tracking time limits and reviewing/validating Time Clocks.
25	Eligibility	Child Support	The process for referring cases to the Local Child Support Agency. Also, include the process for sending updates.
26	Eligibility	Homeless Assistance	The process for processing Homeless Assistance applications.
27	Eligibility	Non-Citizens	The process for processing cases involving non-citizens.
28	Eligibility	Cash Assistance Program for Immigrants (CAPI)	The process for handling CAPI cases. This includes setting up, maintaining, and discontinuing a case.
29	Eligibility	Transitional Food Stamps (TFS)	The process for setting up and maintaining TFS cases.
30	Eligibility	Transitional Medi-Cal (TMC)	The process for handling a TMC case. This includes setting up, maintaining, and discontinuing the case.
31	Eligibility	Inter-County Transfers Out	The process for processing cases that transfer out of the County.
32	Eligibility	IEVS/SAVE Matches	The process for reviewing and clearing IEVS and SAVE reports and discrepancies.
33	Eligibility	MEDS Alerts	The process for clearing MEDS alerts.
34	Eligibility	Sanctions/Penalties	The eligibility process for imposing sanctions or penalties on a person or case.
35	Eligibility	Money Management	The Process to make county-issued disbursements to Vendors on behalf of CalWORKs Customer for housing, utilities, or other.
36	Eligibility	Medi-Cal Semi-Annual Reporting	The process for processing MSRs.
37	Eligibility	Mid-Quarter Changes	The process for handling mid-quarter changes.
38	Eligibility	Quarterly Reporting	The process for processing QR 7s.
39	Eligibility	Skipped Issuances	The process for handling issuances that have been skipped.
40	Eligibility	Denying and Discontinuing Benefits	The process of denying and discontinuing benefits.

41	Eligibility	Re-Evaluations, Recertifications, Renewals	The process for completing the annual review of a program (referred to as "Re-Evaluation" (RE) in the C-IV System).
42	Eligibility <b>DO NOT INCLUDE</b>	Cal-Learn	The process for handling Cal-Learn cases.
43	Employment Services <b>DO NOT INCLUDE</b>	Assign Employment Services Program	The process for assigning an Employment Services program to a worker. Work Registration process.
44	Employment Services <b>DO NOT INCLUDE</b>	Appraisal	The process of conducting a Welfare to Work Appraisal.
45	Employment Services <b>DO NOT INCLUDE</b>	Orientation	The process for scheduling and conducting a Welfare to Work Orientation.
46	Employment Services <b>DO NOT INCLUDE</b>	Assessment	The process for conducting an Assessment. If appropriate, include the referral process.
47	Employment Services <b>DO NOT INCLUDE</b>	WTW Plan	The process for creating a Welfare to Work Plan.
48	Employment Services <b>DO NOT INCLUDE</b>	Learning Disabilities	The Employment Services processes of referral and documentation for LD screening, evaluations and types of accommodations needed. Report or process to ensure LD screening has been offered/completed.
49	Employment Services <b>DO NOT INCLUDE</b>	SIP	The Employment Services process for processing customers choosing to participate in a program (self initiated).
50	Employment Services <b>DO NOT INCLUDE</b>	Community Service/WEX Computation	The Employment Services process of determining the correct number of hours to assign customers to Community Service or WEX.
51	Employment Services <b>DO NOT INCLUDE</b>	Monitor Activities	The process of monitoring a client's activities and compliance with the program.
52	Employment Services <b>DO NOT INCLUDE</b>	Referral for Child Care	The Employment Services process of referring a client for Child Care services.
53	Employment Services <b>DO NOT INCLUDE</b>	Universal Engagement Time Limits	The Employment Services process to accurately count time used toward the Universal Engagement time limit.
54	Employment Services <b>DO NOT INCLUDE</b>	Supportive Service Payments	The process for issuing Supportive Service payments.
55	Employment Services <b>DO NOT INCLUDE</b>	Sanctions ES	The employment services process for imposing sanctions on a person or case.
56	Overpayments/ Overissuance	Eligibility Recovery Accounts	The process for handling Recovery Accounts (overpayments), including how Recovery Accounts are created. This process applies to open cases.



57	Inter-District and Program Transfer	Transfer Process	MC Categorical Eligibles in CalWORKs active cases
58	Contact Center	Customer Call Flow and IVR Menu development.	The process of how calls come into the agency, how they are routed and who the calls are routed to after receipt.

## Appendix 2. Business Process Flow



### Appendix 3. Project Timeline

Project Name	Owner	Accenture Resource	CSA Resource	Dec	1/9	1/16	1/23	1/30	2/6	2/13	2/20	2/27	3/5	3/12	3/19	3/26	4/2	4/9	4/16	4/23	4/30
<b>Stanislaus CSA</b>																					
<b>Contract Phase</b>																					
Define scope and terms	Accenture & CSA	Juli Baker																			
Obtain Approvals	CSA	Juli Baker																			
Finalize Contract	Accenture & CSA	Juli Baker	Contract Manager																		
<b>Executive Engagement &amp; Review</b>																					
Develop Statement of Work		Juli Baker	Exec Team																		
Executive Engagement Plan		Team	Exec Team																		
Meet w/ Executive/Mgt Stakeholders		Team	Exec Team																		
Identify Goals & Objectives		Team	Exec Team																		
Select order of office assessments		Team	Exec Team																		
Define Governance & Communications		Team	Exec Team																		
Deliver Executive Engagement Plan		Team																			
Review Initial Implementation Plan			Exec Team																		
<b>Assessments</b>																					
Develop approach to office assessments/review background		Team																			
Assessment Benefit & Call Center		Team	Office Staff																		
Deliver As-Is process flow diagrams for Benefit and Call Center		Team																			
Assessment Main & outstations		Team	Office Staff																		
Assessment East Side & outstations		Team	Office Staff																		
Assessment West Side & outstations		Team	Office Staff																		
Deliver Recommended process changes for Benefit & Call Center		Team																			
Deliver As-Is process flow diagrams for each office		Team																			
Develop Initial Implementation Plan		Team																			
Deliver Initial Implementation Plan		Team																			
Out-Brief and Final Implementation Plan		Team																			



## Conditions Involved:

- Intake - Eligibility Worker
- Continuing - Eligibility Worker
- Intake - Eligibility Supervisor
- Continuing - Eligibility Supervisor
- Foster Care/GA Hearings Officer - Eligibility Program Specialist
- Eligibility Program Manager

## **SAMPLE** (ABBREVIATED)

# CHANGE DISCUSSION GUIDE

This Change Discussion Guide is your key to the changes that are being implemented. The topics in this guide relate to the processes that will be new, changed or no longer necessary.

## CONTENTS

### Process Changes

#### Eligibility Processes

Intake Interview

Medi-Cal Application Without Interview

Refer to Employment Services

Diversion Payments

Inter-County Transfers In

Inter-County Transfers Out

Direct Deposit

Immediate Need and Expedited Food Stamps

EBT Card Account

Add Additional Programs/Persons

Supervisory Authorization (Supervisors)

Able Bodied Adults Without Dependents (ABAWD)

FSET

Time Limits/Time Clock Reviews

Child Support

Kin-GAP

Foster Care

Adoption Assistance

Refugee Cash Assistance (RCA)

Non-Citizens

Transitional Food Stamps (TFS)

Transitional Medi-Cal (TMC)

IEVS/SAVE Matches

MEDS Alerts

Sanctions/Penalties

Money Management

Aid Paid Pending

Medi-Cal Semi-Annual Reporting

Mid-Quarter Changes

Quarterly Reporting

Skipped Issuances

Denying and Discontinuing Benefits

Re-Evaluations, Recertifications, Renewals

Employment Services Processes

Assign Employment Services Program

Orientation

Sanctions ES

Supportive Service Payments

Up Front Processes

Record Customer Contact

Document Drop-Off or Pick-Up

New Applications

Appointments

## Process Changes

This section of the Change Discussion Guide focuses on specific business processes. It covers the specific responsibilities, tasks, or activities related to the use of the C-IV system. Each table below describes a job process. The column entitled “Task” outlines the tasks within the job process. The column entitled “Steps” describes the steps you will take to complete the task. The “New Concepts” Column contains the new steps.

### Eligibility Processes

#### Intake Interview

##### Major Changes

- EW will use their Workload Inventory to access assigned cases and to view new assignments.
- Root Questions help to populate the SAWS 2. Answers to the Root questions queue additional screens and provide Staff a tool to navigate to data collection pages.
- An easy flow through a case allows for the User to go back and forth as information is obtained during the interview.
- All documents and verifications received may be imaged into the C-IV System and stored electronically.
- The C-IV System uses a combination of aid codes 33 and 30 and the higher MAP amount instead of the 3R and 3P aid codes for the CalWORKs households eligible to higher MAP.
- Accepting and saving the EDBC Results will authorize program benefits.
- Because documents can be scanned and available electronically, documents will be saved until the case is authorized, then documents will be shredded.
- Staff will use the SFIS Referral form to refer customers to SFIS.

##### Benefits of the Changes

- Notices of Action can be appended and saved within the C-IV System.
- If documents are imaged and available electronically in the C-IV System, physical case folders will not need to be maintained for new cases.

#	Task	Steps	New Concepts/Notes
1	<b>Accessing the Pending Application</b>	<ul style="list-style-type: none"> <li>• EW will access the Customer’s pending case and the imaged application in the C-IV System.</li> </ul>	<ul style="list-style-type: none"> <li>• EW will use their Workload Inventory to access assigned cases and to view new assignments.</li> <li>• Newly assigned programs will be distinguished by a red exclamation point icon on the Eligibility Workload Inventory page.</li> </ul>
2	<b>Intake Interview</b>	<ul style="list-style-type: none"> <li>• EW clicks on the Customer information tab in the local navigation bar.</li> <li>• EW reviews the contact information located on the Contact Summary page and updates when necessary.</li> </ul>	<ul style="list-style-type: none"> <li>• Root Questions help to populate the SAWS 2. Answers to the Root questions queue additional screens and provide Staff a tool to navigate to data collection pages.</li> </ul>

#	Task	Steps	New Concepts/Notes
		<ul style="list-style-type: none"> <li>EW completes an interactive interview, using the Root Questions and additional queued screens, to determine eligibility.</li> <li>EW will add information given by the Customer, re: property, income, demographics, etc.</li> </ul>	<ul style="list-style-type: none"> <li>Not all mandatory screens will be prompted by the C-IV System. Examples include the Non-compliance pages as well as the MFG Child Pages.</li> <li>The C-IV System allows the User to manually flow from screen to screen and navigate throughout the pages and complete them as needed.</li> </ul>
3	<b>Image Documents / Verifications</b>	<ul style="list-style-type: none"> <li>EW will continue to collect documents from the Customer during the Intake Interview.</li> <li>If the EW has access to the imaging capture tool, they will scan and return the documents to the Customer.</li> <li>If the EW does not have access to the imaging capture tool, the documents may need to be photocopied or retained until access to the imaging capture tool is available.</li> <li>EW will index the imaged documents to identify document category and type. EW will also indicate if any documents are person-specific documents (such as birth certificate or pay stub).</li> </ul>	<ul style="list-style-type: none"> <li>Workers will image documents instead of photocopying documents provided during the Intake Interview.</li> <li>If documents are imaged and available electronically in the C-IV System, physical case folders will not need to be maintained for new cases.</li> <li>Imaged documents will be immediately viewable by anyone with the appropriate security rights.</li> <li>Documents will be imaged and original copies will be routed to EW. EW will verify imaging quality and index all electronic documents. EW will return original documents to the customer as necessary and place remaining documents in confidential recycling.</li> <li>Imaging capture tool will be available to all staff.</li> </ul>
4	<b>Pending Verification NOAs</b>	<ul style="list-style-type: none"> <li>At the completion of an interview, any pending verifications will be listed on the Verification List page and can be generated and printed.</li> </ul>	<ul style="list-style-type: none"> <li>The pending verification NOA can be appended to add additional information as needed.</li> </ul>
5	<b>Running EDBC</b>	<ul style="list-style-type: none"> <li>EW will choose which program(s) to run EDBC for.</li> <li>EW will review the budgets for correctness for each program.</li> <li>If the EDBC results are correct, EW will Accept and Save Results based on County Policy.</li> </ul>	<ul style="list-style-type: none"> <li>The EDBC detail pages are displayed in a web based format with hyperlinks that allow you to access more detailed aspects of a budget.</li> <li>Accepting and saving the EDBC Results will authorize program benefits.</li> </ul>
6	<b>Authorization NOAs</b>	<ul style="list-style-type: none"> <li>NOAs will need to be reviewed and Saved and Printed Locally or Centrally.</li> </ul>	<ul style="list-style-type: none"> <li>All Notices can be appended before they are printed and sent to the customer.</li> </ul>



#	Task	Steps	New Concepts/Notes
			<ul style="list-style-type: none"> <li>NOAs that have not been reviewed will still be processed and mailed out Centrally as part of the daily batch processing.</li> </ul>
7	SFIS	<ul style="list-style-type: none"> <li>EW will complete the SFIS Referral form.</li> <li>Completed form will be handed to Customer to give to reception.</li> <li>SFIS referral form will be shredded by Reception Staff once SFIS has been completed.</li> <li>SFIS Match will be imaged into the case.</li> </ul>	<ul style="list-style-type: none"> <li>Staff will use the SFIS Referral form to refer customers to SFIS.</li> </ul>

## Medi-Cal Application Without Interview

### Major Changes

- All verifications will be imaged per county policy.
- For existing cases, documents will be imaged when received by mailroom.
- For new cases, mailroom will route physical documents to File Clearance to create case and image documents.
- County will answer all Root Questions. Root Questions are used to populate the SAWS 2 and guide the User with additional screens. With the MC 210 on file (imaged or hard copy), the SAWS 2 is not required.

### Benefits of the Changes

- A 2<sup>nd</sup> Correspondence Recipient can be appointed to receive Customer mail.
- Information will be entered into the C-IV System with no physical case folder to accompany it.
- The C-IV System will process SLMB, QI1, and 250% program Medi-Cal cases. Manual overrides will no longer be required for these programs.

#	Task	Steps	New Concepts/Notes
1	Mail-In Applications	<ul style="list-style-type: none"> <li>EW will review the completed MC 210 and enter all non-financial and financial information into the C-IV System.</li> <li>EW will continue follow county policy to work with the Customer if additional information is needed.</li> <li>If EW needs to update or add an administrative role (e.g., payee, correspondence recipient), this will be done from the Program Detail page.</li> <li>EW will run EDBC once all information has been entered and verifications have been</li> </ul>	<ul style="list-style-type: none"> <li>A 2<sup>nd</sup> Correspondence Recipient can be appointed to receive Customer mail.</li> <li>For existing cases, documents will be imaged when received by mailroom.</li> <li>For new cases, mailroom will route physical documents to File Clearance to create case and image documents.</li> <li>It will be County policy to complete the Root Questions for</li> </ul>

#	Task	Steps	New Concepts/Notes
		received.	a non-interview application. This policy will be re-evaluated as needed.
2	<b>Incomplete Mail-In Applications</b>	<ul style="list-style-type: none"> <li>• If an MC 210 is received incomplete, EW will enter the received information. A checklist of pending verifications will be mailed to the customer.</li> <li>• If all verifications are not received timely, EW will follow current County policy to deny the case.</li> <li>• If verifications are received, continue to process the application.</li> </ul>	

*California SAWS Consortium IV*



**First Data Government Solutions  
County Purchase ST-FDC-01-2012  
Stanislaus County - Contact Center Technology  
Deployment**



## I. Overview/Scope of Work:

This Stanislaus County First Data Government Solutions Purchase Order ("County Purchase") is related to the Agreement ("Agreement"), dated as of October 29, 2007, as amended, by and between the Statewide Automated Welfare System Consortium IV Joint Powers Authority ("Consortium") and First Data Government Solutions, LP ("First Data"). Unless the context indicates otherwise, all capitalized terms that are used, but not defined, in this Purchase Order, shall have the meaning assigned to such terms in the Agreement.

Stanislaus County would like to utilize the C-IV Contact Center Solution. The approach to delivering the C-IV Contact Center Solution to the County includes planning, analysis, design, build, test and deployment of the Stanislaus service center technology deployment beginning February 2012 and completing in May 2012.

To deploy the local service center in Stanislaus, QA hours are required to analyze the requirements and design, and conduct independent testing of the solution in accordance with approved C-IV processes. The First Data QA scope of work includes an additional 550 hours of effort for the First Data Team. This support will be accomplished in accordance with the approved Independent Test Plan; all assumptions defined and agreed to as part of this Plan will apply.

First Data will work with the Consortium and Development Contractor teams to assist in the local service center deployment. First Data will perform the following tasks in support of the local service center deployment:

- Attend and participate in requirements and design meetings;
- Review work products;
- Review all SCRs to validate design points are captured and align with the C-IV standards;
- Review and provide input on technical requirements including the Voice and Data Network requirements, application integration and CTI requirements;
- Validate the reporting requirements and security requirements using industry standards where applicable;
- Validate the IVR technical architecture where applicable;
- Validate number of lines, length of calls and recommended number of agents;
- Validate call flows and ensure appropriate call routing based on the path entered by the client;
- Verify the skills based routing for voice calls and web chat;
- Review all System Test plans and provide recommendations as appropriate;
- Test the IVR script and provide independent test, both negative testing and positive testing. Each test will include production-like activities which will be tracked and validated through the QA independent testing process;
- Provide the Development Contractor team with thoroughly documented SIRs in a timely manner when an issue is discovered as a result of the testing;



- Promptly complete a retest of SIRs and report findings through PVCS Tracker when the code corrections have been promoted to the test environment;
- Validate training plan and provide input for timing of training;
- Assist County staff with model office testing;
- Validate the data proposed for wallboards;
- Provide input, advice and best practices to the Consortium based on prior experiences and implementations; and
- Assist the Consortium with communications, planning and problem solving during design, test, and implementation.

**II. Schedule:**

The local deployment Services described above will be completed in four months, commencing in February 2012 and completing in May 2012. The Charges associated with this County Purchase will be incurred during State Fiscal Year 2011/12.

**III. Total Cost:**

The following table outlines the total Charges for this County Purchase by task.

#	QA Task	Total Hours	Total Cost
1	Project Management	28	\$3,660
2	Requirements, Build and Design	208	\$27,871
3	Independent Test / Model Office	178	\$24,564
4	Implementation	32	\$5,998
5	Model Office & Implementation Support	104	\$12,613
	<b>Total</b>	550	\$74,706

**IV. Milestone and Payment Schedule:**

The following table outlines the Charges and invoicing timelines for payment Milestones associated with the local deployment Services.

Milestone Number	Description	Scheduled Acceptance Date	QA Contractor Charges	SFY 2011/12
1	Contact Center Technology Deployment - Plan Complete	2/17/2012	\$22,412	\$22,412
2	Contact Center Technology Deployment - Build Complete	4/6/2012	\$22,412	\$22,412
3	Contact Center Technology Deployment Complete	5/10/2012	\$29,882	\$29,882
	<b>TOTAL</b>		<b>\$74,706</b>	<b>\$74,706</b>



**COUNTY PURCHASE APPROVAL**

**Subject: First Data County Purchase -ST-FDC-01-2012**

The subject document is accepted as allowing First Data Government Solutions to proceed with the subject County Purchase.

**Stanislaus County**

By: Christine C. Applegate  
Printed Name: **Christine C. Applegate**  
Title: Director  
Date: 1/11/12

Notice Address:  
251 E. Hackett Road  
Modesto, CA 95358

APPROVED AS TO FORM:  
**STANISLAUS COUNTY-COUNSEL**  
BY: [Signature]  
DATE: 12/23/11

**SAWS CONSORTIUM-IV JOINT POWERS AUTHORITY**

By: [Signature]  
Printed Name: **John Boule**  
Title: CIV Project Director  
Date: 1/18/12

Notice Address:  
SAWS Consortium-IV Joint Powers Authority  
Attention: C-IV Project Director  
11290 Pyrites Way, Suite 150  
Rancho Cordova, CA 95670-4481

**County Of Stanislaus**  
By: [Signature]  
**Keith D. Boggs**  
Title: Deputy Executive Officer  
**GSA Director / Purchasing Agent**  
Date: \_\_\_\_\_

# *California SAWS Consortium IV*



## **County Purchase ST-03-2012 Stanislaus County - Enclosures (QR7 Mailings)**



## I. Overview:

With the implementation of SCR 40533 – Automate Process to Attach Enclosures to Certain C-IV Forms, all 39 Counties have the option of adding enclosures to their Central Print mailings. As such, Stanislaus County has requested to add an enclosure to three of its upcoming QR 7 print runs. The scope of this County Purchase includes the following:

- One-Time Production Operations Charges
  - Print Charges

### Assumptions:

- The Total Cost is an estimate, based on a total of 36,441 enclosures (3 print runs, 12,147 enclosures per print run) and is subject to change at the time of ordering. The final cost will be provided to the Consortium at the time of invoicing.
- This County Purchase covers the one-time operations charges necessary for this effort. Enclosures will be added to three of the County's upcoming monthly QR 7 print runs, which are scheduled for May 23, 2012, June 22, 2012 and July 23, 2012.
- Production Operations charges are based on an approximate average monthly volume of 12,147 QR 7 mailings for Stanislaus County and two (2) impressions per enclosure. Each enclosure will be printed in grayscale on 8 ½" x 11" 20 lb. white paper, tri-folded, and inserted at a rate of \$0.045 per impression.
- Stanislaus County will provide the enclosure to C-IV electronically, in a print ready file (PDF, Microsoft Word document), with one enclosure per file.
  - The print ready file must be properly marked as either simplex (single sided) or duplex (double sided) via the attributes of the software used to create the file.
- One invoice will be submitted per each of the three print runs. Each invoice will be submitted on the 7th calendar day following the print run to the Consortium, who will then invoice the County.
- Stanislaus County will be responsible for funding all postage costs resulting from this effort and continue to use the standard process for making deposits into its postage account appropriately.
  - Adding enclosures to the County's mailings may increase the weight per mailing and, therefore, result in increased postage costs. Estimated postage costs for this effort are not included in the Total Cost of this County Purchase.
  - Postage rates are subject to change at the discretion of the United States Postal Service.
- The County must approve this County Purchase by April 13, 2012 in order for these estimates to be valid. Otherwise, a new County Purchase will be required.





**II. Schedule:**

The charges associated with this County Purchase will be incurred during State Fiscal Year 2012/13.

**III. Total Cost:**

<b>Total County Purchase Charges</b>	<b>Total Cost</b>
<b>Administrative Charges</b>	<b>\$0</b>
<b>Hardware and Software Charges</b>	<b>\$0</b>
Hardware Charges	\$0
Hardware Maintenance and Support Charges	\$0
Software Charges	\$0
Software Maintenance and Support Charges	\$0
<b>Production Operations Charges</b>	<b>\$3,280</b>
One Time Charges	\$3,280
Recurring Charges	\$0
<b>Total Charges</b>	<b>\$3,280</b>



COUNTY PURCHASE APPROVAL

**Subject:** County Purchase - ST-03-2012

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

**Stanislaus County**

By: Christine C. Applegate  
Printed Name: Christine C. Applegate  
Title: Director  
Date: 4/9/12

Notice Address:  
CSA Stanislaus  
251 E. Hackett Road  
Modesto, CA 95358

**County of Stanislaus**

By: [Signature]  
Keith D. Boggs  
Title: Assistant Executive Officer  
GSA Director/Purchasing Agent  
Date: 4.26.12

**SAWS CONSORTIUM IV JOINT POWERS AUTHORITY**

By: [Signature]  
Printed Name: John Boule  
Title: C-IV Project Director  
Date: 4/12/12

Notice Address:  
SAWS Consortium-IV Joint Powers Authority  
Attention: C-IV Project Director  
11290 Pyrites Way, Suite 150  
Rancho Cordova, CA 95670-4481

APPROVED AS TO FORM:  
STANISLAUS COUNTY COUNSEL.  
BY [Signature]  
DATE: 4/6/12



**COMMUNITY SERVICES AGENCY**

**Christine C. Applegate**  
Director

251 E. Hackett Road, Modesto, CA

Mailing Address  
P.O. Box 42, Modesto, CA 95353-0042

## Introducing the Customer Service Center

In an effort to provide the most efficient customer service, Stanislaus County has implemented a Customer Service Center (CSC) that will assist you with all your reported changes and/or case questions for:

- CalWORKs
- CalFresh (Food Stamps)
- Medi-Cal

**Effective immediately**, you may call the following number to obtain assistance.

**1-877-652-0734\***

**Available Monday through Friday from  
8:00 am – 5:00 pm**

You will be connected to a Customer Service Representative (CSR) who can assist you with a variety of case services. You will no longer have an assigned Case Manager; however you will continue to receive reports, letters, forms and appointment services from CSA.

Community Services Agency (CSA) is dedicated to providing you with efficient customer service.

\* You will be asked to enter your case number and IVR PIN (Personal identification Number). If you do not have an IVR PIN, you may request one when you call the above number.



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**COMMUNITY SERVICES AGENCY**

**Christine C. Applegate**  
Director

251 E. Hackett Road, Modesto, CA

Mailing Address  
P.O. Box 42, Modesto, CA 95353-0042

## Presentando el Centro de Servicio al Cliente

En un esfuerzo para proporcionar servicio más eficiente al cliente, el condado de Stanislaus ha implementado un Centro de Servicio al Cliente (CSC), que le ayudará con todos sus cambios reportados y/o preguntas del caso de:

- CalWORKs
- CalFresh (estampillas para comida)
- Medi-Cal

**Con efecto inmediato, puede llamar al siguiente número para obtener asistencia.**

**1-877-652-0734\***

**Disponible de lunes a viernes de  
8:00 am – 5:00 pm**

Usted será conectado con un Representante de Servicio al Cliente (RSC), que le puede ayudar con una variedad de servicios prácticos. Ya no tendrá un trabajador de caso asignado, sin embargo, usted continuará recibiendo informes, cartas, formularios y citas para servicios de la Agencia de Servicios Comunitarios.

La Agencia de Servicios Comunitarios (CSA) se dedica a proporcionar un servicio eficiente al cliente.

\* Se le pedirá que marque su número de caso y el PIN de IVR (Número de Identificación Personal). Si usted no tiene un PIN de IVR, puede solicitar uno al llamar al número ya mencionado.



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# *California SAWS Consortium IV*



## **County Purchase ST-02-2012 Stanislaus County - IVR Mailings**



## I. Overview:

With Production Release 10.06, the new Interactive Voice Response (IVR) solution became available to all 39 C-IV counties. In order to utilize the new solution, Stanislaus County has requested a mass mailing of the new IVR Pin and Consent forms via System Change Request (SCR) 44597- Send IVR Forms for Stanislaus County. The scope of this County Purchase includes the following:

- One-Time Production Operations Charges
  - Central Print
  - Envelopes

### Assumptions:

- The Total Cost is an estimate and is subject to changes at the time of ordering. The final cost will be provided to the Consortium at the time of invoicing.
- This County Purchase covers the one-time operations charges necessary for this mailing effort. The Services required for this effort are included in SCR 44597 and funded separately from this County Purchase.
  - A one-time batch run will be created to generate and send out a set of the following three forms to all Primary Applicants for cases where an Active Programs exists and a Personal Identification Number (PIN) is not already set up. Each set of forms consists of 4 print impressions.
    - Cover Letter
    - IVR 101 - New IVR PIN Letter
    - IVR 100 - IVR Consent
  - One (1) #10 C-IV Project Envelope and one (1) Business Reply Mail (BRM) Envelope will be required for each mailing/set of forms.
  - The form populations will not change as defined in SCRs 36245 and 37810. However, the worker information population will be based on the Active programs at the time of the job run and will populate based on the following hierarchy:
    1. CalWORKs
    2. Food Stamps
    3. Medi-Cal
    4. Welfare-to-Work (WTW)
- Print, envelope and postage volumes are based on an estimated maximum of 48,000 Primary Applicants.
- This SCR is scheduled to be implemented in Production by May 1, 2012 via Priority Release 12.03x, which would enable this print run to be created at the County's request. The County must provide notice of its request three weeks in advance of its desired run date.



- If the print run occurs between the 1st and 15th calendar day of the month, the one-time Production Operations will be invoiced to the Consortium on the 7th calendar day following the print run, who will then invoice the County. Otherwise, the charges will be invoiced on the 7th calendar day, two months following the print run.
- An estimate for the postage costs resulting from this SCR is provided in this County Purchase solely for the County's budgeting purposes and is not included in the Total Cost of this County Purchase. Stanislaus County will be responsible for funding all postage costs resulting from this SCR and continue to use the standard process for making deposits into its postage account appropriately.
- Postage rates are subject to change at the discretion of the United States Postal Service.
- Baseline recurring operations charges for the IVR solution are currently funded by the Consortium – up to \$5,044 in inbound/outbound calls for Stanislaus County. However, any charges resulting from this SCR that exceed Stanislaus County's baseline amount will be paid by the County.
  - Overage charges will be invoiced to the County at 2 cents for Long Distance and 3 cents for Toll Free, each rounded up to the next full minute.
  - These charges are not included in this County Purchase, but will be invoiced to the County in quarterly arrears using the County Administrative Expense process.
  - If the County is going to exceed its baseline amount but does not have the available funding, then the County has the option to complete a SCR to discontinue the IVR service.
  - Additional information regarding baseline operations charges can be found in C-IV Information Transmittal (CIT) 0075-10.
- The County must approve this County Purchase by March 30, 2012 in order for these estimates to be valid. Otherwise, a new County Purchase will be required.



**II. Schedule:**

The charges associated with this County Purchase will be incurred during State Fiscal Year 2011/12.

**III. Total Cost\*:**

Total County Purchase Charges	Total Cost
<b>Administrative Charges</b>	<b>\$0</b>
<b>Hardware and Software Charges</b>	<b>\$0</b>
Hardware Charges	\$0
Hardware Maintenance and Support Charges	\$0
Software Charges	\$0
Software Maintenance and Support Charges	\$0
<b>Production Operations Charges</b>	<b>\$11,904</b>
One Time Charges	\$11,904
Recurring Charges	\$0
<b>Total Charges</b>	<b>\$11,904</b>

\*The Total Cost of this County Purchase does not include the following estimates for postage.

Total Postage Charges - County Funded	Total Cost
Outgoing Mailing - #10 C-IV Project Envelope	<b>\$21,600</b>
Incoming Mailing - Business Reply Mail (BRM) Envelope	<b>\$21,600</b>
<b>Total Charges</b>	<b>\$43,200</b>

**IV. References:**

This purchase is tracked via SCR 44597 - Send IVR Forms for Stanislaus County.





COUNTY PURCHASE APPROVAL

**Subject:** County Purchase - ST-02-2012

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

**Stanislaus County**

By: Christine C. Applegate  
Printed Name: Christine C. Applegate  
Title: Director  
Date: 3/30/12

Notice Address:  
CSA Stanislaus  
251 E. Hackett Road  
Modesto, CA 95358

**County of Stanislaus**

By: [Signature]  
Title: Assistant Executive Officer  
GSA Director/Purchasing Agent  
Date: 5/29/12

**SAWS CONSORTIUM-IV JOINT POWERS AUTHORITY**

By: [Signature]  
Printed Name: John Boule  
Title: C-IV Project Director  
Date: 4/2/12

Notice Address:  
SAWS Consortium-IV Joint Powers Authority  
Attention: C-IV Project Director  
11290 Pyrites Way, Suite 150  
Rancho Cordova, CA 95670-4481

APPROVED AS TO FORM:  
STANISLAUS COUNTY COUNSEL  
BY [Signature]  
DATE: 3/28/12

1. Charges Summary

Total County Purchase Charges	Total Cost
<b>Administrative Charges</b>	<b>\$0</b>
<b>Hardware and Software Charges</b>	<b>\$0</b>
Hardware Charges	\$0
Hardware Maintenance and Support Charges	\$0
Software Charges	\$0
Software Maintenance and Support Charges	\$0
<b>Production Operations Charges</b>	<b>\$11,904</b>
One Time Charges	\$11,904
Recurring Charges	\$0
<b>Total Charges</b>	<b>\$11,904</b>

\* The County will reimburse the C-IV Project for all charges. The charges as this County Purchase should not impact the C-IV Project Budget.

1. Charges Summary

Total County Purchase Charges	Total Cost
<b>Administrative Charges</b>	<b>\$0</b>
<b>Hardware and Software Charges</b>	<b>\$0</b>
Hardware Charges	\$0
Hardware Maintenance and Support Charges	\$0
Software Charges	\$0
Software Maintenance and Support Charges	\$0
<b>Production Operations Charges</b>	<b>\$11,904</b>
One Time Charges	\$11,904
Recurring Charges	\$0
<b>Total Charges</b>	<b>\$11,904</b>

\* The County will reimburse the C-IV Project for all charges. The charges as this County Purchase should not impact the C-IV Project Budget.