**EAMS ACCESS SFTP SOLUTION**
*external advisory group*
*agenda and meeting minutes*

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| **Project:** | **EAMS ACCESS SFTP SOLUTION** |
| **Meeting:** | EAMS Access present term solution meeting |

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| **Date-Time-Location:** | Sept. 29, 2010 1:00PM – 3:00PM  Room 1304 |
| **Invitees:** | Andrea Coletto, Brenda Ramirez, Brian Schwabauer, Camilla Wong, Carolyn McPherson, Dale Clough, Dan Jakle, Danny Teklehaimano, Denise Spelzini, Denise Yip, Dr. George Rothbart, Eric Knight, Gary Gallanes, Jake Greenwell, Joel Hecht, Jose Gonzales, Joshua Bright, Julia Burns, Justin Geiger, Katherine Borlaza, Kim Lincoln-Hawkins, Linda Atcherley, Lorie Kirshen, Marc Glaser, Margo Hattin, Martin Dean, Matt Herreras, Oleg Katz, Paul Defrances, Pete Harlow, Renee Sherman, Richard Brophy, Ron Weingarten, Ryan Hitchings, Sandy Trigg, Sean Blackburn, Steve Cattolica, Tara Lewis, Yvonne E. Lang, CKV Sadishkumar; Dave Cohen; Dan Jakle; Jose Gonzales; Denise Yip; Illicena Elliott; Eric Knight; Jake Greenwell; Danny Teklehaimano; Beatrice Yao; Ryan Hitchings; Denise Spelzini; Felicia Black; Amit Khosla; Paul Defrances; Lorie Kirshen; Ritzesh Sawhney; Peter Melton; Sam Morris; Sivakumar Ponnuswamy |
| **Optional Attendee:** | |
| **Facilitator / coordinator:** | Ira Phillip |
| **Meeting Minutes taken by:** | Janet Tsao |

| | **Agenda 09/29/10** | **Owner** |
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| **1.** | Open meeting | Ira Phillips and Susan Gard |
| **2.** | User acceptance testing (UAT) | Joel Harter |
| **3.** | Account rollout strategy | Susan Gard |
| **4.** | Overall project status | Susan Gard |
| **5.** | Future group meeting | Susan Gard |

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| 1. | **Open meeting**<br>Roll call | Ira Phillips |
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|  | Opening remarks:  PTS is right on schedule.  We have completed the lien conference check box option.  We are right on track with Web enhancement.  We will show you the progress we've made for the Web access later in this meeting. | Susan Gard |
| 2. | **User acceptance testing (UAT)**<br><br>As you know, our goal is to get paper out of the scanning queue at the district offices.  Towards that end, DWC identified volume filers of six OCR forms.  From that population, we invited those volume filers, along with all vendors, who are members of the external user advisory group to participate in user acceptance testing.  The goal of UAT is to test all documents that will go through bulk filing in order to make sure that they will work properly in EAMS.<br><br>Nine organizations participate in UAT.  Three defense attorney firms and six vendors.  Applicant attorneys are represented in this group through vendors who service them.<br><br>The participants are:<br><br>• ARS Legal<br>• eCandidus<br>• EDEX IS<br>• Essential Publishers<br>• Hanna Brophy<br>• Pearlman, Borska & Wax<br>• State Fund<br>• Software Technologies, LLC<br>• TriTek Legal.<br><br>The group will begin testing the application for adjudication of claims then go through the remaining five forms:<br><br>• Declaration of readiness to proceed<br>• Declaration of readiness to proceed expedited trial<br>• Compromise and release<br>• Notice and request for allowance of lien<br>• Stipulations with request for award. | Joel Harter |

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| | The group meets every other week to work on spread sheet and script data.<br><br>**Recommend**:  final UAT takes place in early Jan. after the holidays. | |
| 3. | **Account rollout strategy**<br><br>DWC identified 600 large or very large filers of six OCR forms.  Large filers are those who file more than 100 and less than 1,000.  The very large filers are defined as those who file more than 1,000 files.  Priority of account roll out goes to those large to very large filers of top six OCR forms. Ninety days from "go live" date, we will roll out 600 accounts.<br><br>In Nov., DWC communications team will initiate a marketing campaign targeted at the large and very large OCR filers with the goal of having them participate in PTS bulk filing.<br><br>Third party filers work off one account.  The numbers of their clients do not take away from the initial 600 account limit.<br><br>We don't anticipate licensing issue in account roll out.<br><br>**Action item**:  DWC will analyze the numbers of e-filers in the large to very large filers.  DWC will consider the possibility of including e-filers in PTS bulk filing. | Susan Gard |
| 4. | **Overall project status**<br>Reference: EAMS Present Term Solution Update power point presentation dated Sept. 29, 2010<br><br>The project is now 60% complete. We worked on three simultaneous developments:<br>• Lien conference is complete and went into effect Aug. 1.<br>• Web enhancement is near completion.<br>• SFTP filing development is on-going.<br><br>Web access<br>The technical team is testing Web access screens.  The business team will test after technical team concludes its testing.  The original completion date for Web access is Oct. 31.  We are well into its development and should be finish before end of Oct.  Web access will go live as soon as it's | Susan Gard |

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done.

General condition of use for the State will be displayed on the screen.  General restrictions will be displayed.

We will not provide any information that is prohibited on the Web site.  For example, we will not provide injured worker's address or Social Security number.  There are no case documents, just data.

**Recommend**: case events display as continuous page without breaks.

DWC will publish newsline and EAMS insider on when Web access goes live.

UAT and technical development of SFTP bulk filing are on-going.  UAT meet every other week.  Technical development meeting every other Thursday.

Anyone going to go live with DWC in 2011 should be working with our technical staff.

**Request**: hold regular bi-weekly technical meeting to provide status update even if there is no question submitted to the technical team.

DWC will take this request into consideration.

| 5. | **Future meeting of group**<br><br>Our next meeting will be in early Nov. when Web access is complete.  We will discuss account roll out strategy, go over the trading partner agreement and preview Web access.<br><br>We will meet again just before go live.  Anticipate meeting in first or second week of Dec. | Susan Gard |
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| 6. | **Next steps**<br><br>Finalize trading partner agreement and account roll out strategy. | Susan Gard |