

UNDERGROUND SERVICE ALERT

—▶ NORTHERN CALIFORNIA & NEVADA ◀—

811 Contact Center Update - USAN

California Underground Safety Board Meeting

January 9-10, 2023 – Sacramento

James Wingate, Executive Director, USAN

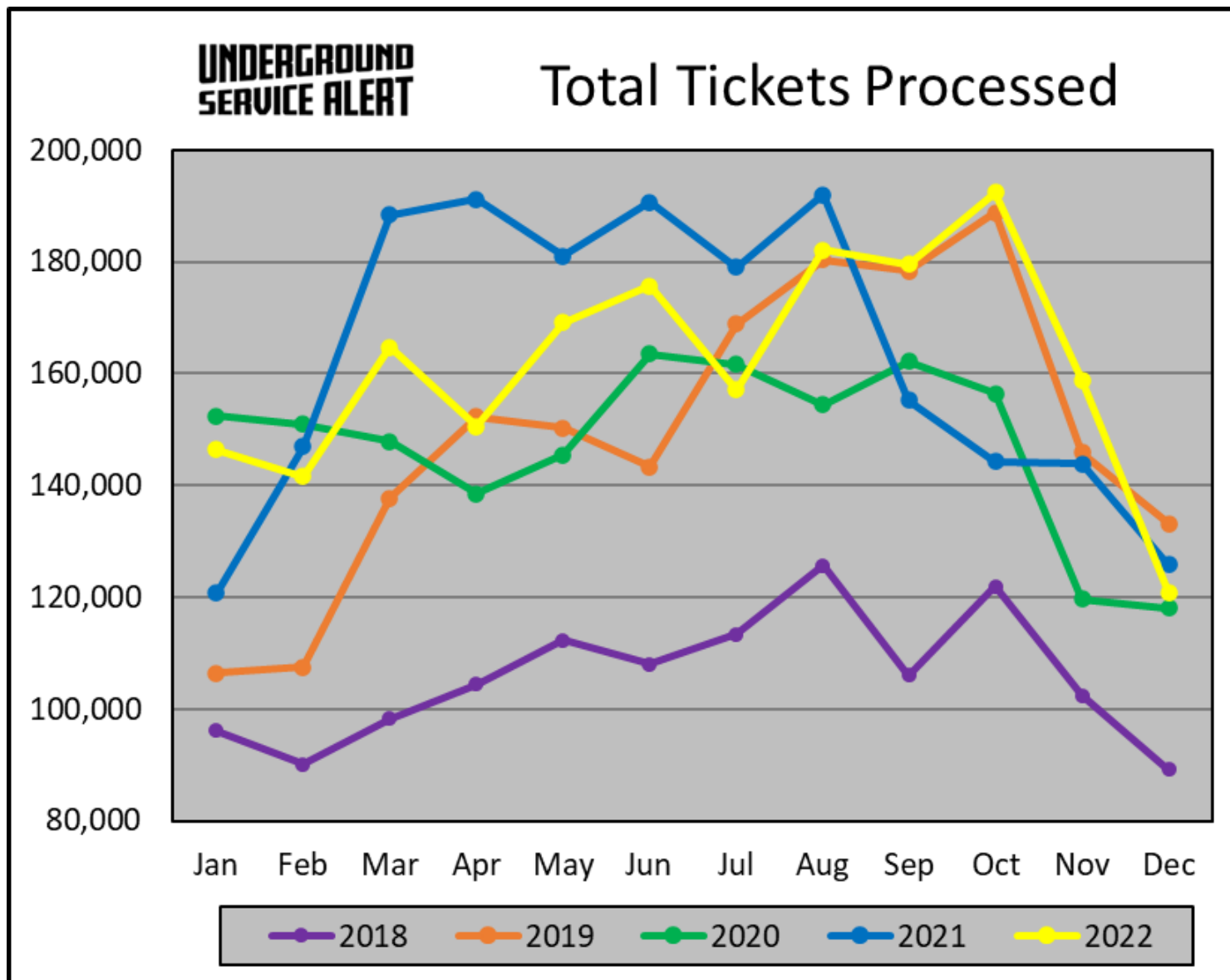


Know what's **below.**
811 before you dig.

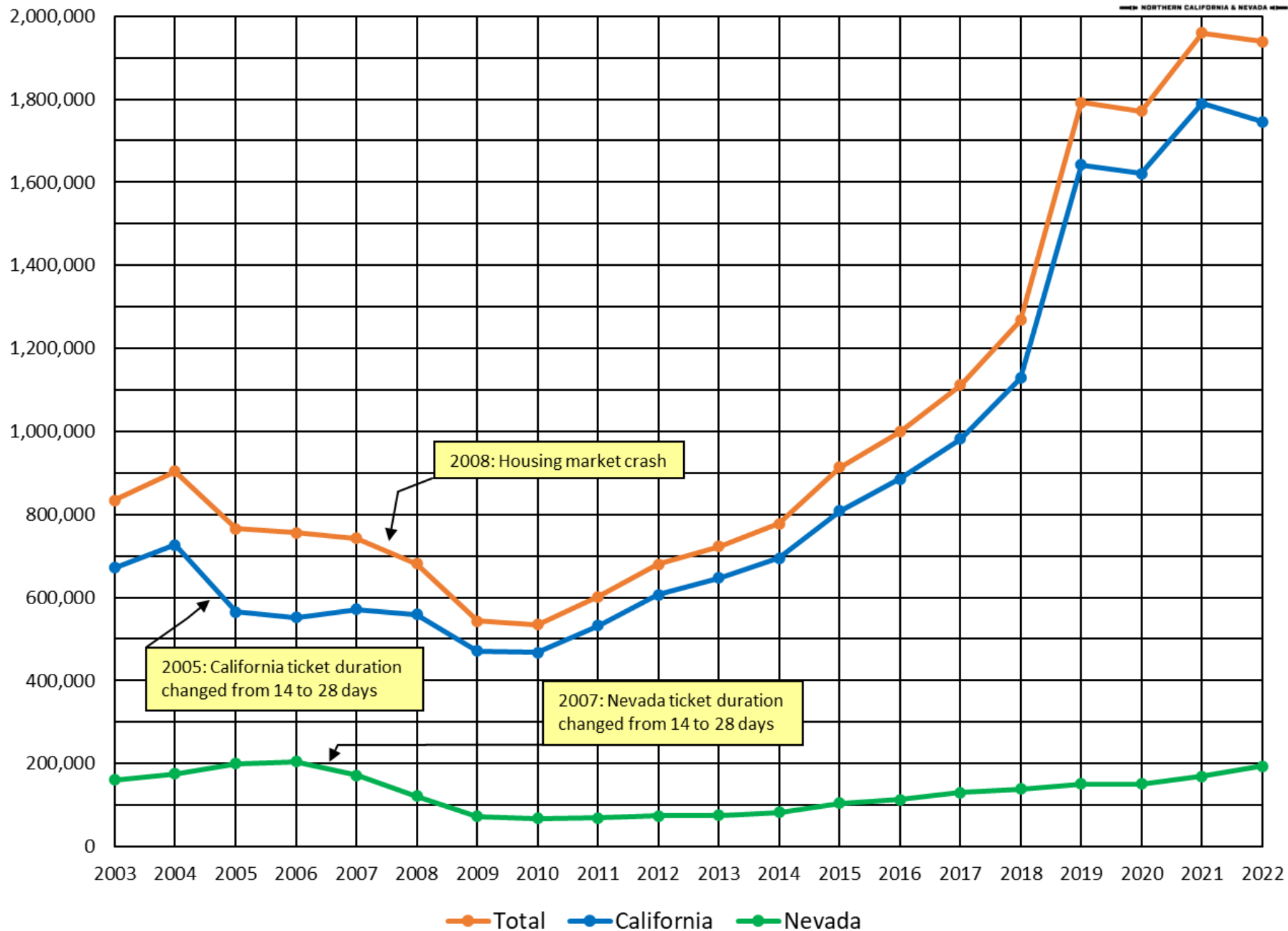
Statistics 2022 Overview

Ticket volume 2022

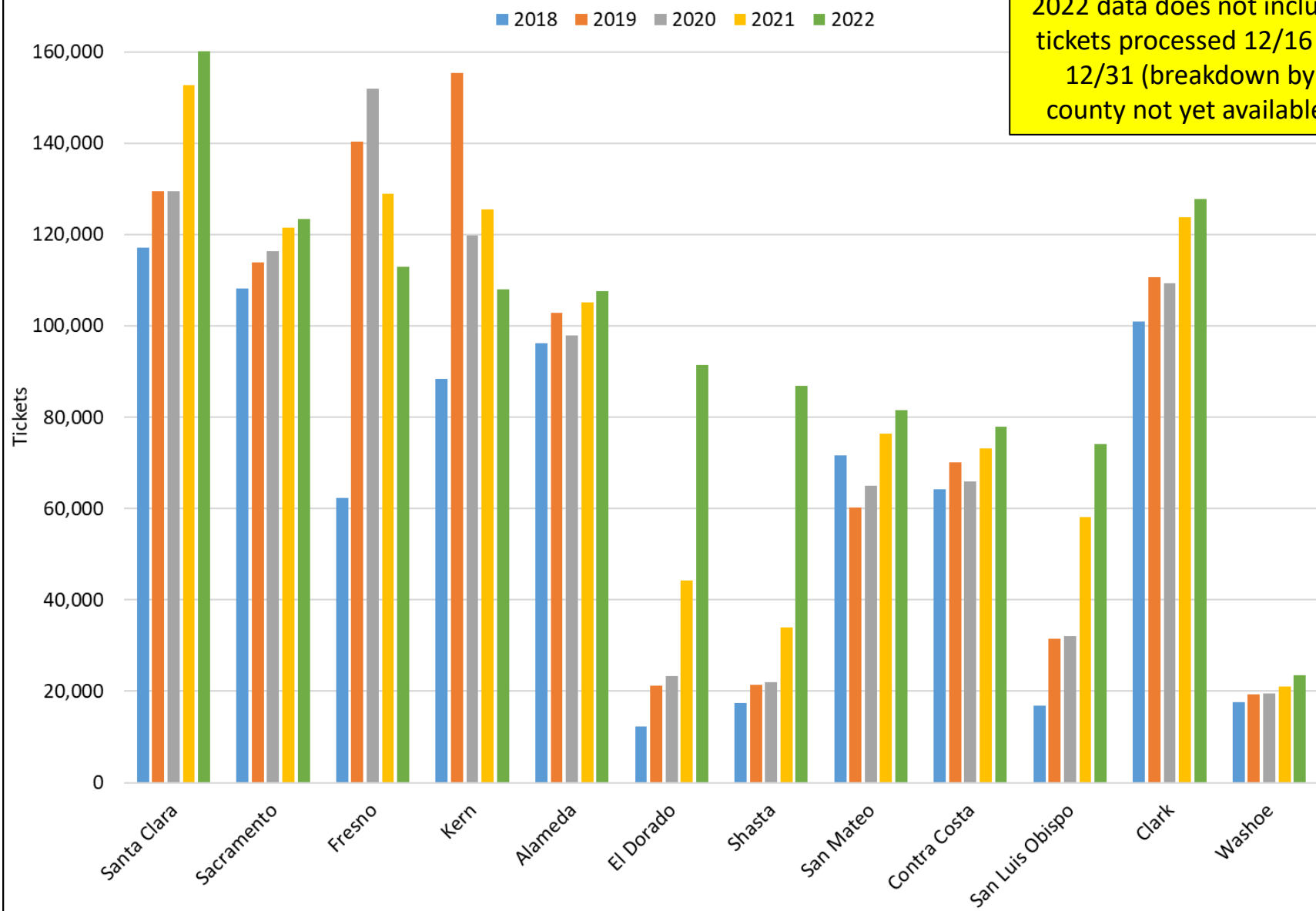
- USAN Total: 1,939,492
-19,975 tickets (-1.0%)
vs. 2021
- California: 1,745,713
-43,957 tickets (-2.5%)
- Nevada: 193,716
+23,982 tickets (+14.1%)
- Osmose Utility Services:
313,650 tickets submitted
(138K New, 166K Renewals)
-92,608 tickets (-22.8%)
vs. 2021
- Osmose is -93K tickets vs.
2021, rest of California is
+49K tickets



Ticket Volume: Last 20 Years (2003-2022)



Busiest Counties by Ticket Volume 2018-2022 CA top 10 & NV top 2



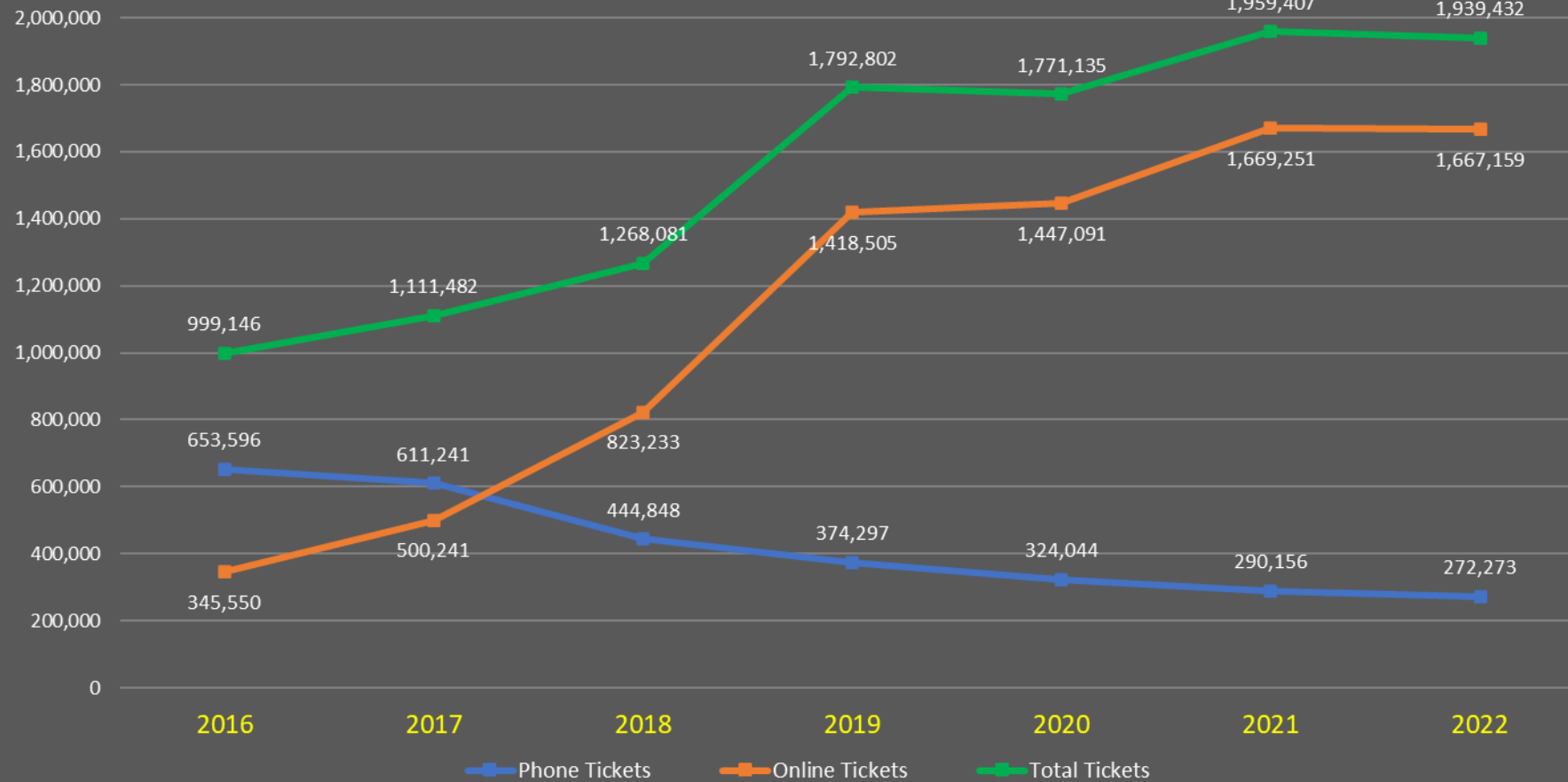
California counties: Santa Clara - San Luis Obispo

Nevada counties: Clark & Washoe

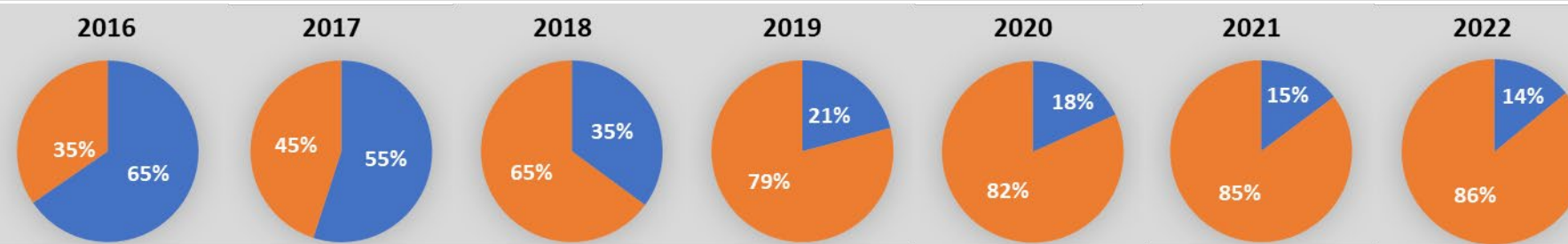


Statistics 2022: Telephone Calls

Tickets by Telephone vs. Online 2016 - 2022



- % of Tickets Processed Online: **86.0%**
- Average Speed of Answer: **67 seconds**
- % of Calls Answered within 30 Seconds: **75.3%**
- % of Calls Answered after waiting 10 minutes or longer: **1.9%**
- Average Call Handle Time: **7 minutes 56 seconds (+8.2% vs. 2021)**

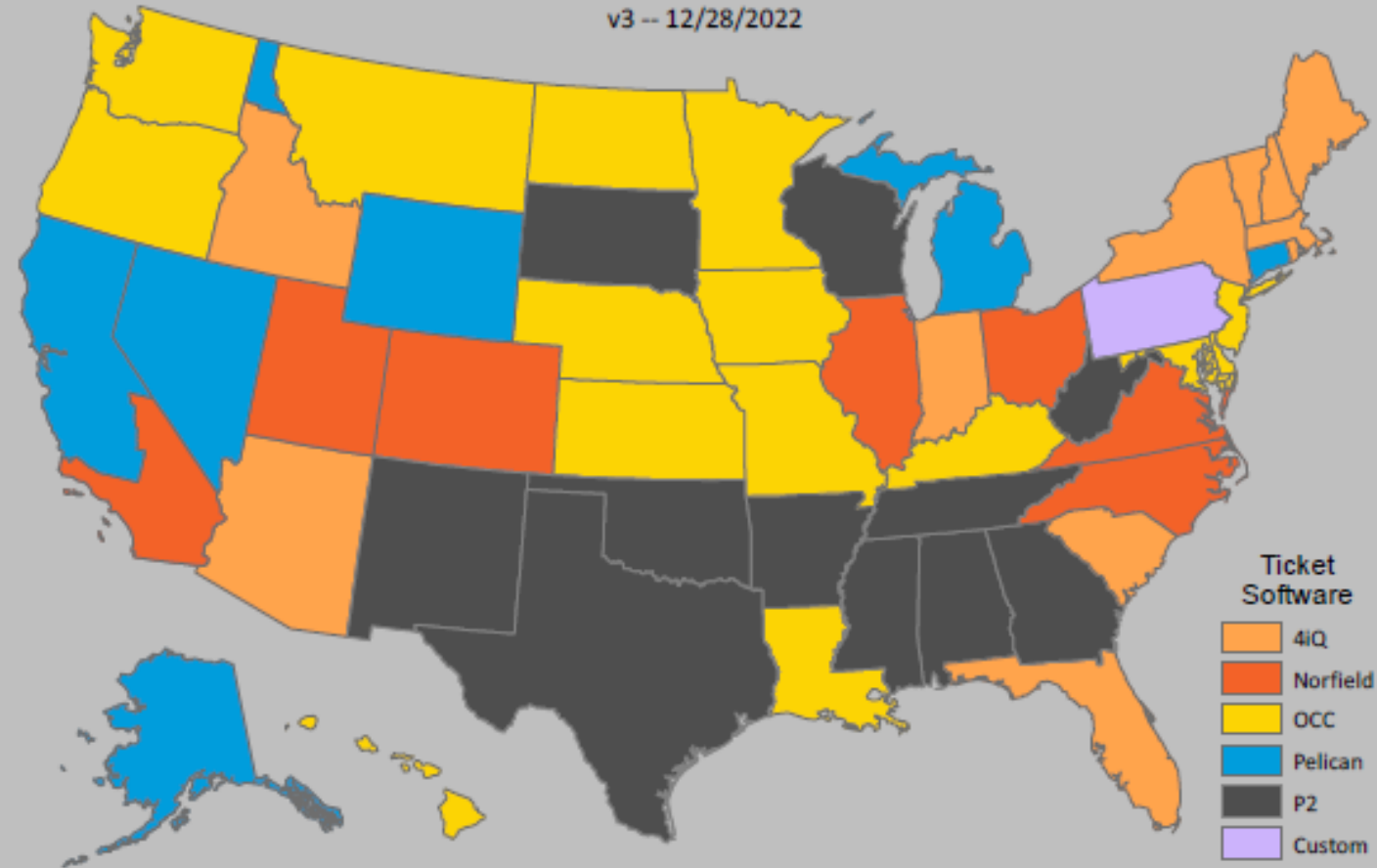


New Ticket System Cutover: 12/16/2022

- Change from “Newtin” system developed by Norfield Development Partners to “One Call Access” by PelicanCorp.
- While there are dozens of vendors that make software for utility operators to manage their tickets, there are **only 5 vendors that sell software to one call centers** to help them create and deliver tickets. No out-of-the-box solution exists.
- USAN believes the Pelican system is the best choice for USAN’s needs.
- **Separate systems for CA & NV** – allows for easier customization by state to accommodate differences in laws, policies & procedures.

One Call Centers -- Ticket Creation Software Used

v3 -- 12/28/2022



SOFTWARE VENDOR	ONE CALL CENTERS (total: 50)
4iQ Solutions	7 centers in 11 states – AZ, FL, ID-S, IN, New England (MA, ME, NH, RI, VT), NY-N, SC
Norfield Development Partners	7 centers in 7 states – CA-S, CO, IL (minus Chicago), NC, OH, UT, VA
One Call Concepts (OCC)	16 centers in 17 states – DC & MD-W, DE & MD-E, HI, IA, KS, KY, LA, MN, MO, MT, ND, NE, NJ, NY-S, OR, WA
PelicanCorp	6 centers in 7 states – AK, CA-N & NV, CT, ID-N, MI, WY
Progressive Partnering (P2)	12 centers in 12 states/areas – AL, AR, GA, MS, NM, OK, SD, TN, TX, WI, WV, GulfSafe*
Custom in-house software	2 centers in 2 states – Chicago, PA
* Notes	<ul style="list-style-type: none"> * One Call Concepts provides call center staffing for most of their customers in addition to ticket system software. * GulfSafe covers underwater oil & gas facilities in the Gulf of Mexico and Straits of Florida. * There is no official list showing which software is used by each One Call Center (this list compiled by USA North 811 in December 2022).



How Did the Cutover Go?

What went well?

- Core functionality of system working properly.
- Good cooperation between Pelican, USAN, and key stakeholders:
 - Vendors that sell ticket management software to utility operators: Irth, KorTerra, DigTix, Boss811, etc.
 - Large utility operators with custom in-house ticket management software: PG&E, AT&T, Verizon, Kinder Morgan, etc.
 - Contract Locators with in-house ticket systems: UtiliQuest, USIC, Stake Center Locating, ELM Locating, etc.
 - Vendors that sell ticket management software to excavators: 811 Spotter, DigContrax.
 - CA Office of Energy Safety IT: to give regulators real-time access to tickets, EPR

The screenshot shows the top portion of a web browser window. The address bar displays 'usanorth811.org/system-change/'. The page content is divided into two main sections: 'Training' and 'Utility Members Webinar'. The 'Training' section contains a paragraph about weekly Damage Prevention Portal trainings. The 'Utility Members Webinar' section features three orange buttons: 'RSVP for Dec 7th', 'RSVP for Dec 14th', and 'Previous Webinar Recording'. Below these is a 'Video Resources' section with a paragraph and two orange buttons: 'How to set up your Account' and 'How to Manage Subscriptions' with a 'Live Chat' icon.

The screenshot shows the bottom portion of the same web browser window. The address bar is the same. The page content is divided into two main sections: 'User Guides & Documentation' and 'Utility Member Services Contacts'. The 'User Guides & Documentation' section features four orange buttons: 'DamagePreventionPortal User Guide', 'Transitional Period EPRs', 'Utility Locator Ticket Example - N. CA', and 'Utility Locator Ticket Example - NV'. The 'Utility Member Services Contacts' section features three white boxes with contact information for Nick White, Nathan Oliver, and Germain Suess. A 'Live Chat' button is visible in the bottom right corner.



Ticket Status: Original
Transmission ID 1

Ticket Type: Normal
Response Required: Yes

Excavator Details

Contact: Scott [REDACTED] **Phone:** [REDACTED] **Mobile:** [REDACTED]
Company: --Property Owner/Resident-- **Email:** [REDACTED]o.com
Excavator Type: Homeowner (or private individual/volunteer group) **Language:** Not Supplied
Address: 56 [REDACTED] Ct El Sobrante California 94803 **Excavator ID:** 9175

Dig Site and Ticket Details



[Open Map](#)

Latitude/Longitude: 37.957829 -122.276435
GIS coordinate system: WGS84 (WKID 4326)

Ticket Action Reason:

[Empty box for Ticket Action Reason]

Excavator Remarks:

Digging up plants in front yard and replacing

Previous Ticket #		Rev.#	
Submitted	12/16/2022 00:30	Medium	WEB
Work Begin Date	12/20/2022 17:01		
Legal Start Date	12/20/2022 17:01		
Ticket Expiration	01/13/2023 23:59		
Work Duration	2-4 days		
Address/Location	[REDACTED] Ct		
City/Town/Place	El Sobrante		
County	Contra Costa County		
State	CA	Zip Code	94803
Nearby Cross Street	Robinhood Drive		
Subdivision/Lot			
Delineated Method	White Paint		
Work Type	Residential property work		
Work Activity	Yard - Deck/Mailbox/Playground/Pole/Lighting/Etc		
Excavation Method	Hand digging		
Anticipated Depth	12 to 24 Inches		
Boring	No	Explosive	No
Street/Sidewalk	No	Pavement Only	No
Vacuum Excavation	No		
Project Owner	Homeowner/Property Owner/Tenant/HOA		
Permit	No Permit required		
Job #/Name	Not Supplied		
Onsite Contact Name	Scott [REDACTED]		
Onsite Contact Phone	925-[REDACTED]		

What Went Well? (part 2)

What else went well?

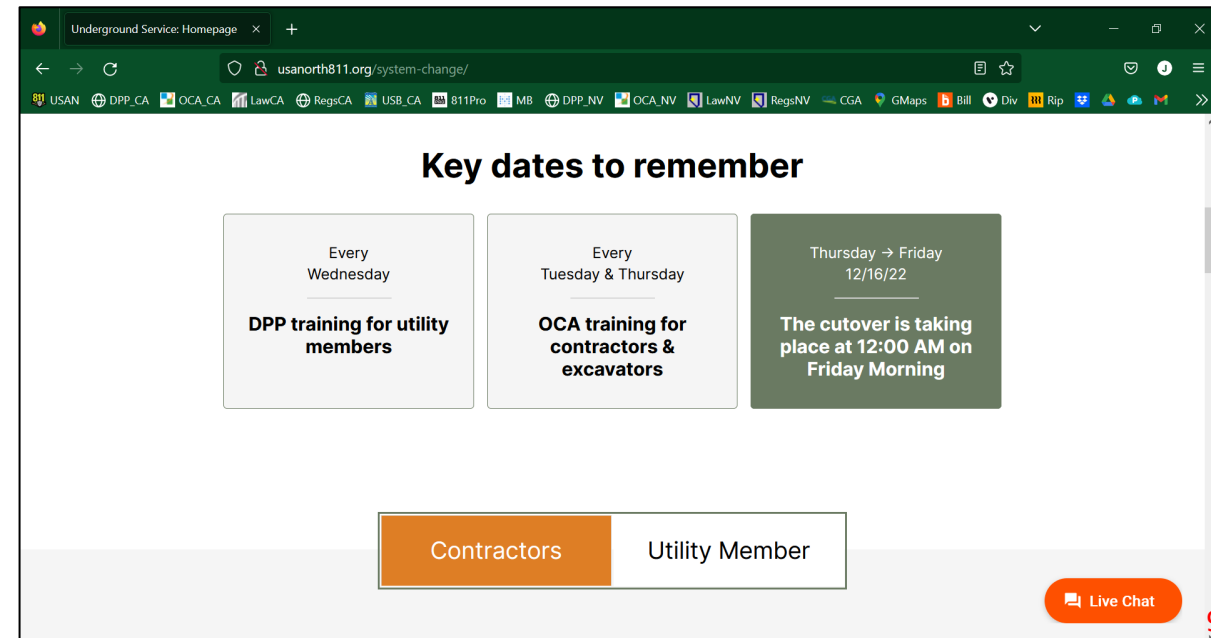
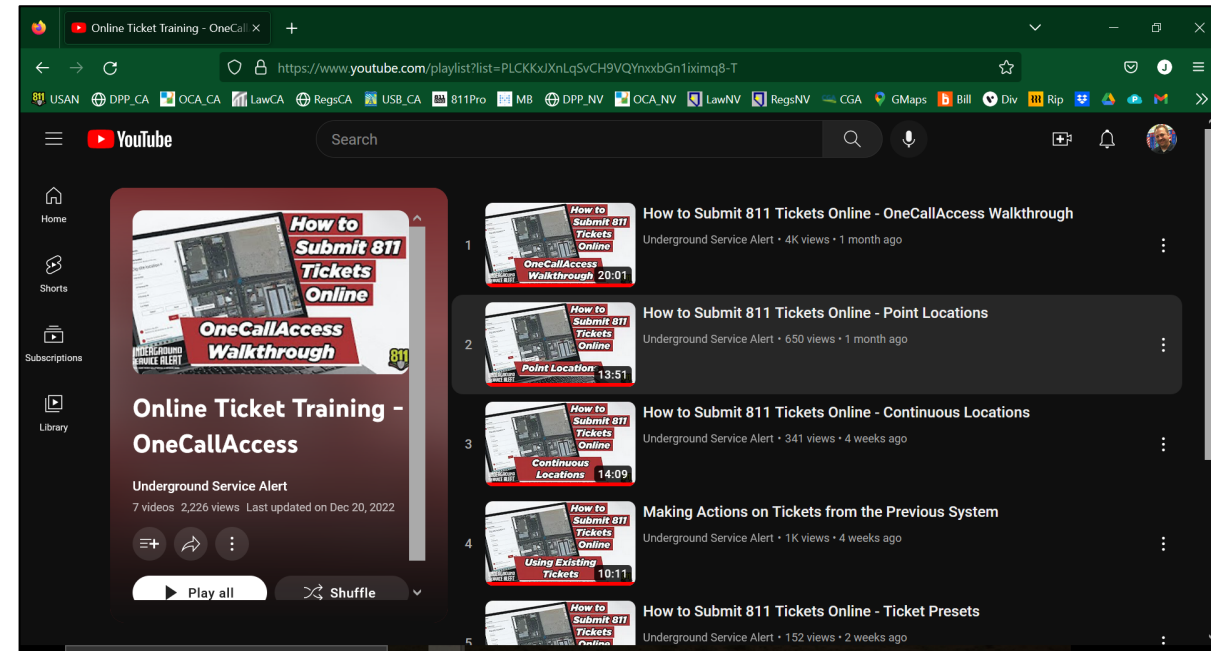
- First ticket was from a homeowner, done online with no help. Dig site polygon was tight and marking instructions were specific. This was a great start to proving the effectiveness of USAN’s two-pronged technology strategy:
 - Create an intuitive platform that will enable efficient online self-service, which will enable USAN to handle the expected increases in ticket volume efficiently and cost-effectively.
 - Provide improved mapping tools to enable the excavator to identify the dig site location with precision. This will reduce confusion and save time in the field for both utility operators and excavators.

What Went Well? (part 3)

What else went well?

- USAN staff exhibited exemplary commitment to the success of this project and worked many long days to ensure its success.
 - Extensive communication to stakeholders...
 - How-to videos, webinars
- New Chat feature through USAN's website also went live on 12/16. This enabled us to provide live help that was more effective and efficient than by telephone since screenshots could be shared via chat.

A screenshot of a live chat support form. The form has an orange header with a 'Live Chat' icon and text. Below the header, there is a message: 'Thank you for contacting support. Please complete this form and click Submit.' followed by a text input field. Below that are fields for 'Phone' and 'Email'. A section titled 'How may we help you today?' contains a dropdown menu with the following options: 'Choose item from the list', 'Online Ticket Help', 'Utility/Operator Membership Help', and 'General 811 Help and Questions'. At the bottom of the form is a large orange 'SUBMIT' button.



What Could Have Gone Better?

Did everything go perfectly? No.

- Pelican developers were working right up until the time of cutover (literally to the last minute).
 - Excavators did not have time to test the new system before it went live. We undoubtedly could have gained valuable feedback from excavators before the cutover if they could have helped test.
- Not all functionality is working properly. Many bugs need to be fixed. Development is still ongoing.
- Change is hard.
 - Human nature is to procrastinate. Some member utility operators and some excavators claimed they didn't know anything about the cutover until it had already happened.

Supplemental map layers are not yet searchable and labeling needs to be improved.

Show map instruction

Latitude: 35.189738 Longitude: -119.469195

0.3mi 0 0.5 1mi

Operator's Notes

- Google Hybrid
- Google Street
- Google Satellite

- Counties
- Forestry Service Roads
- Mileposts
- Railroad Mileposts
- Oil and Gas Wells
- Parcels
- Preliminary Parcels
- Preliminary Parcels Annotation
- Sections
- Township/Range
- Zipcodes

Leaflet | (C) 2018 Google Hybrid

What Could Have Gone Better? (part 2)

Ticket Sharing Is Not Working Properly.

- A major problem was discovered and development is underway to correct it. But development with full testing will likely take ~3 weeks. This will cause much short-term pain for large excavators that must manage many tickets created by multiple users.
- Finding the privacy balance of sharing enough but not too much is tricky and the software development is complex. USAN appreciates the patience of the excavating community while this key issue is being worked on. It is top priority.



On December 16th we launched our next ticket entry program, Pelican's One Call Access. One of the great features of this new system is secure ticket sharing. Ticket sharing allows users to create a share link between their account and another account from within their same organization. Unfortunately shortly after going live the ticket sharing feature experienced a major issue and had to be shut off. Since then, the Pelican developers have been working on a fix and one is currently in development. We have been told that ticket sharing should be ready to go live tentatively at the end of this month after development and testing is fully completed. Until then we have heard of users needs which vary from company to company. While these temporary solutions are not perfect, they will allow you to bypass ticket sharing until it gets fixed.

- **If you just need a way for others in your company to see the tickets:** There are a couple work arounds to handle this. You can either have the person who creates the ticket forward the email copy of the ticket to another person or persons or you can have your company users update their emails to a generic email inbox, something like tickets@companyname.com, so that all ticket emails flow into one email inbox that is accessible to multiple people in the company.
- **If you need a way for others in the company to take action on tickets when people are out:** When someone in the office is on vacation or out sick and you need another employee to have access to their tickets to do no responses, damages, remarks, etc the best current work around to this is to have that employee provide their login information to the other employee while they are out of the office. That way the employee who is taking over their responsibilities when they are out can login and still have access to those tickets. Another option is to have the person perform any actions on their tickets before they go out for vacation or other leaves. Renewals for example can be performed up to 7 days before the ticket expires. If the vacation or other leave is scheduled, the person could take care of all their ticket actions before they leave as well.

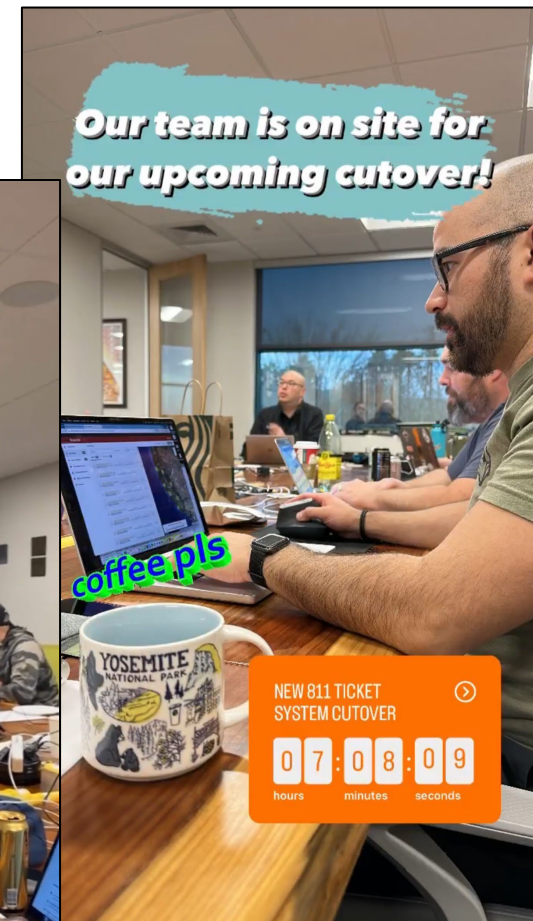
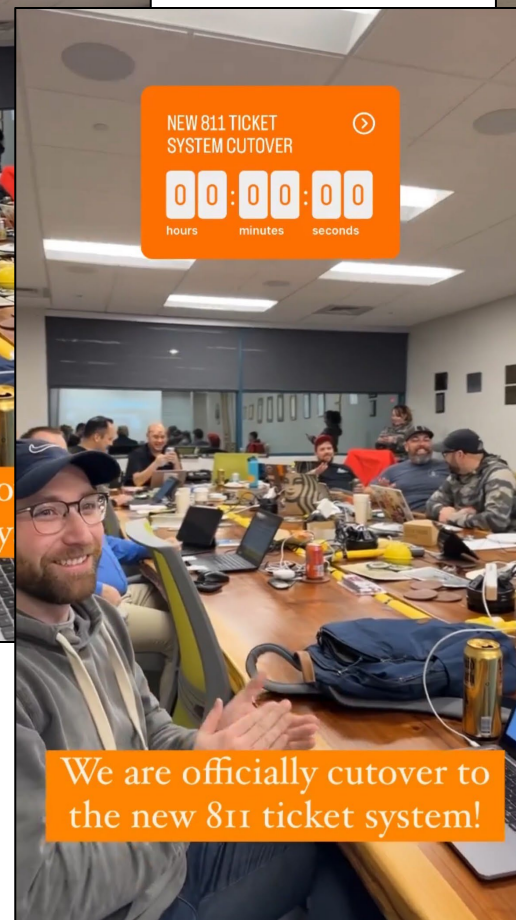
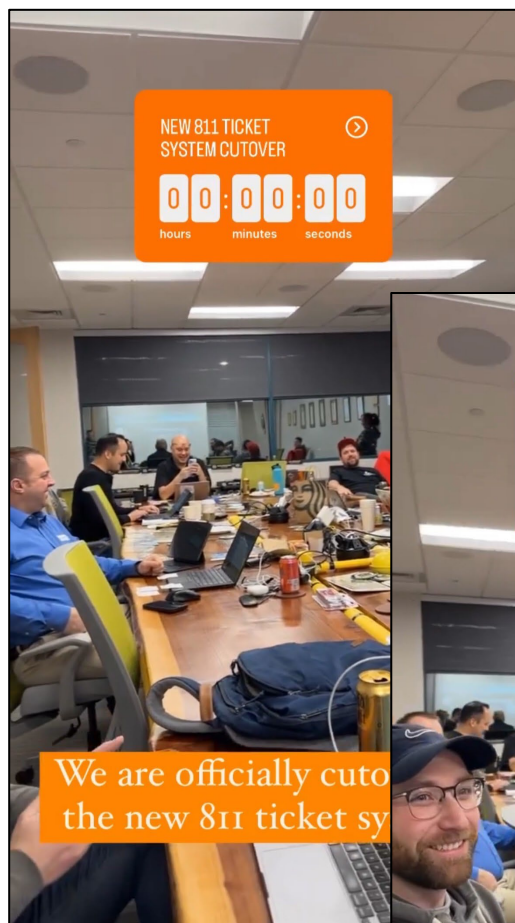
The bottom line is ticket sharing needs to get fixed asap, and we are doing everything we can to help make this happen. We understand these work arounds are not sustainable, but for the time being they are the best options to work around this situation. We apologize for the inconvenience this has caused everyone and thank you for your patience as we work with the development team to get this addressed asap.



What Could Have Gone Better? (part 3)

What else could have gone better?

- Project took a major toll on USAN staff. Many long days and hundreds of extra hours worked.
 - Working with Pelican staff to build the new system (define business rules, etc.)
 - Extensive testing at all stages.
 - Create and disseminate training materials, including videos and live webinars.
 - Support after the cutover to answer questions, help members and excavators who did not prepare properly for the cutover. This included dealing with some upset members and excavators.
 - At the start of this project, we envisioned Michigan 811 would do the heavy lifting (they changed from Norfield to Pelican 1 year ago). They did not and their cutover did not go well.

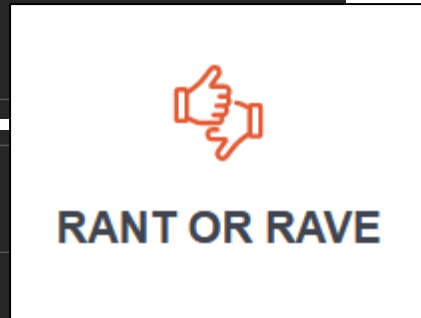


Evaluation of Cutover

It has been a success overall, but much work remains to be done.

- Many member utility operators have said they can see the benefit to the smaller dig site polygons and how they can save time and money by knowing more precisely where the digging will occur.
- Many excavators have said that the new system will take some time to learn but they see how it will be better in the long run.
- There has been some negative feedback from member utility operators (medium and small operators) and excavators. Most negative feedback was about wanting more time for testing.
- More robust reporting should be helpful to overall damage prevention efforts (need a few months of data first).

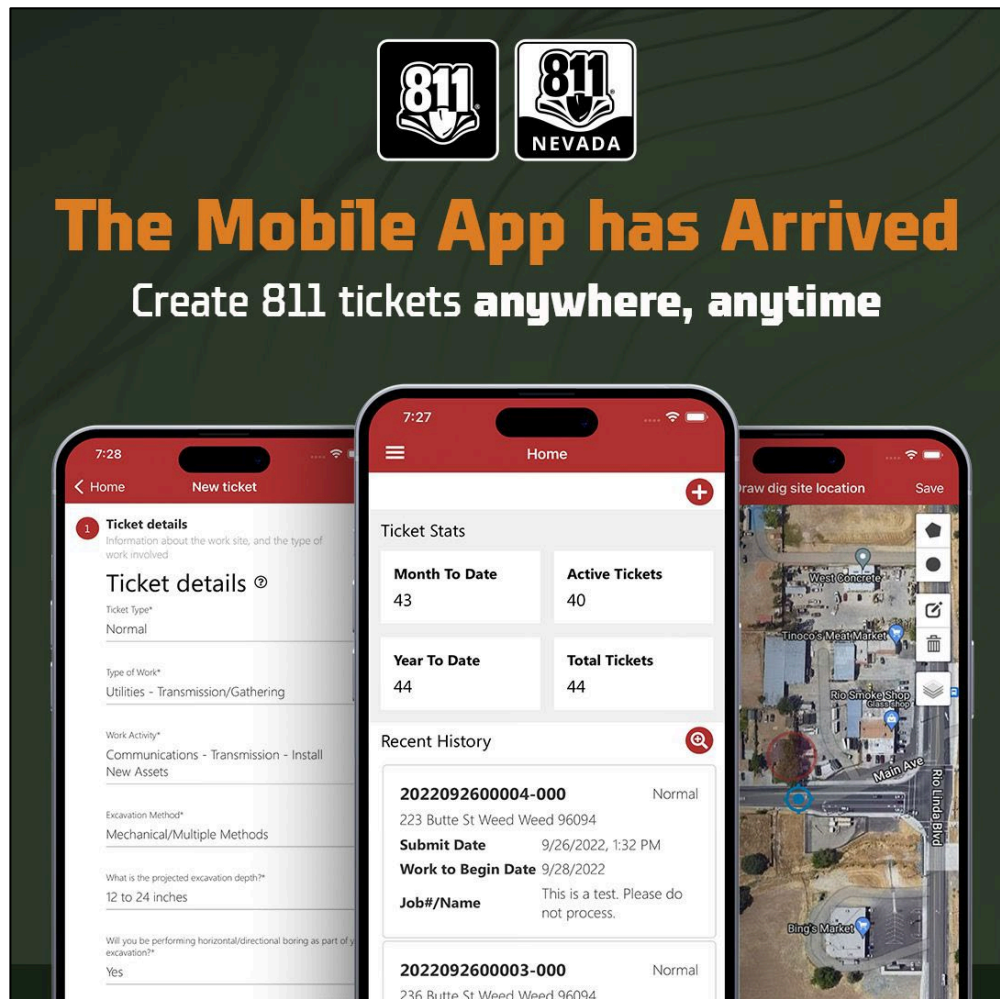
Select a Category	Ticket Creation Process
Rant or Rave	Rant
Rant	When creating USA tickets in the new system I do not see an option anywhere to include the site contact person's email, just their name and phone number. What am I missing? How do I include the site contact / job foreman email address on the ticket so that they get notified automatically by email when I do (like the old system) that the ticket has been created, that a utility has responded, that they are clear to start work, etc.?
Last Update	2022-12-19 13:38:39



Select a Category	Online Ticket (OneCallAccess)
Rant or Rave	Rant
Rant	It would have been nice for you guys to let us know that A) you were changing the source email/vendor and B) that the new xml schema would be totally different from the previous one. Also, removing data is not cool. Now we are having to go through a weeks worth of ticket emails and for the ones we do have there is no response url like there was in the previous one. It is as if no one thought this through...
Last Update	2022-12-21 10:55:18

2023 Goal: Promotion of Mobile App

Goal in 2023 will be to expand the mobile app's functionality and promote its use to excavators.



- Mobile apps available for iPhone & Android; separate apps for California and Nevada.
- Currently mobile app can submit New tickets only.
- Currently cannot perform secondary ticket actions (No Response, Renewal, Re-Mark, Damage, Exposed, Return Trip Request, Amendment, Cancel).
- Currently cannot view responses from Electronic Positive Response (EPR) system.
- Eventual long-term goal is this functionality plus two-way EPR in which excavators and utility operators can share documents with each other (photos, maps/plans, etc.).
- A mobile app for utility operators is also being considered.

New 2023 Targeted Marketing Efforts

CARCGA's 2021 Incident Event Report

- USAN has had ongoing marketing campaigns in the Bay Area, Las Vegas, and Reno.
- New in 2023 will be targeted smaller-market campaigns for Sacramento, Fresno, and the Agricultural Community (in addition to the ongoing campaigns).

