



CalSAWS | JPA Board of Directors Meeting

May 14, 2021



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# Agenda

1. Call Meeting to Order
2. Confirmation of Quorum and Agenda Review
3. Public Opportunity to speak on items NOT on the Agenda. Public comments are limited to no more than three minutes per speaker, except that a speaker using a translator shall be allowed up to six minutes.

Note: The public may also speak on any Item ON the Agenda by waiting until that item is read, then requesting recognition from the Chair to speak.

- All lines will be muted when meeting begins.
- To unmute:
  - ✦ When connected via computer – click the microphone icon.
  - ✦ When connected via telephone – press \*6.



# Action Items

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## Action Items

4. Approval to Increase Delegated Authority of the CalSAWS Executive Director for AWS through CDT in SFY 2020/21
5. Approval of Delegated Authority to the CalSAWS Executive Director to extend AWS through CDT contract
6. Approval to exercise Eide Bailly Contract Option to Extend
7. Approval of Accenture LRS/CalSAWS Amendment 26 to Incorporate Proquire Terms and Conditions

# Action Items

## 8. Approval of Consent Items

- a. Approval of the Minutes and review of the Action Items from the April 16, 2021 CalSAWS JPA Board of Directors meeting.
- b. Approval of First Data LRS QA Amendment 6, which includes language necessary to impose the requirements and obligations of the Privacy and Security Agreement (PSA)
- c. Approval of First Data C-IV QA Amendment 71, which includes language necessary to impose the requirements and obligations of the Privacy and Security Agreement (PSA)

# Action Items

## 9. Approval of Consent Items

- d. Approval of Deloitte Portal/Mobile PSA Amendment 1, which includes language necessary to impose the requirements and obligations of the Privacy and Security Agreement (PSA)
- e. Approval of Deloitte CalWIN Implementation Services PSA Amendment 1, which includes language necessary to impose the requirements and obligations of the Privacy and Security Agreement (PSA)
- f. Approval of Infosys PSA Amendment 1, which includes language necessary to impose the requirements and obligations of the Privacy and Security Agreement (PSA)



# Informational Items

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## BenefitsCal Update

- Outreach, Training, and Public Awareness Plans
- Conversion of Customer Accounts





# Communications Strategy

## Our Aspiration

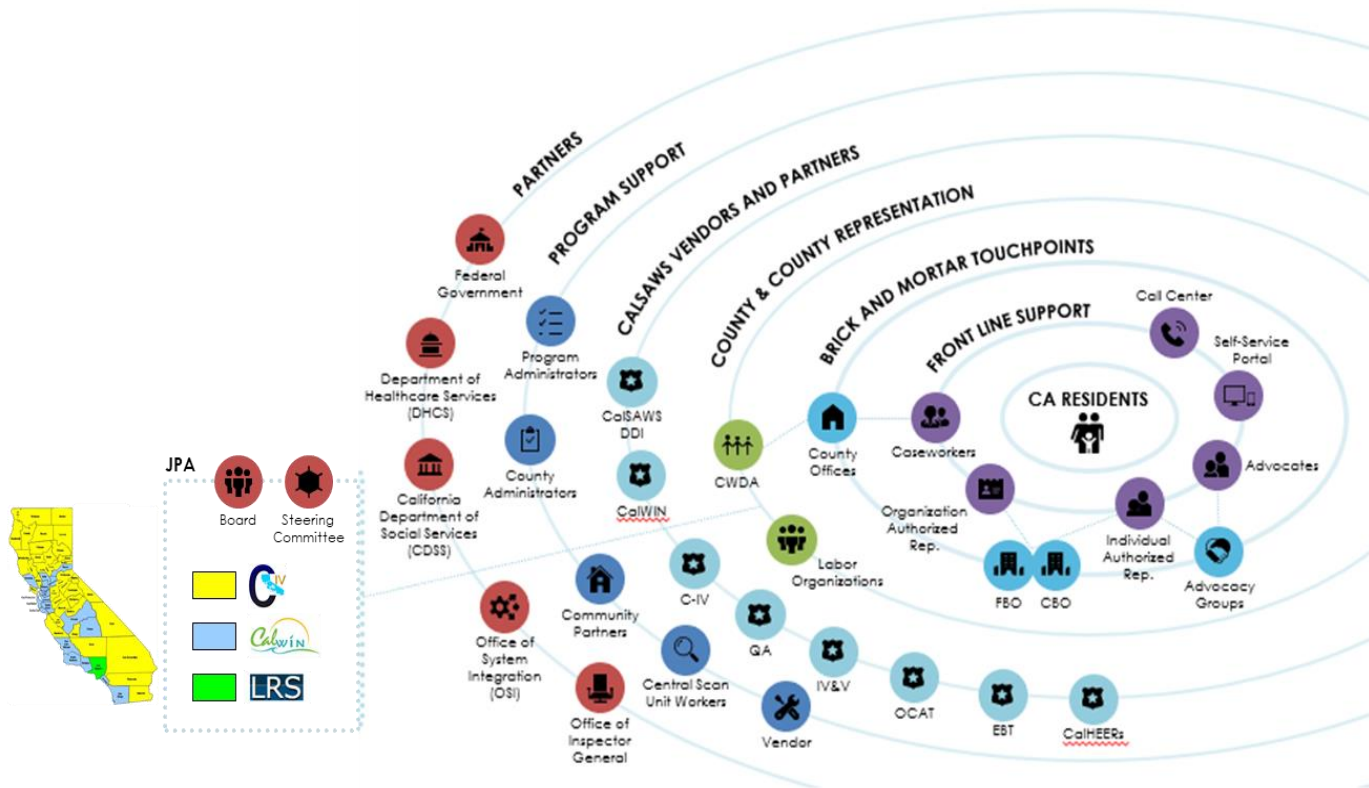
To communicate the right messages to stakeholders, at the right time, to provide a **positive Customer-first experience** with the new BenefitsCal.

Through proactive communication, we can **build trust** and increase **long-term adoption.**



# BenefitsCal Stakeholders

The stakeholder ecosystem for BenefitsCal is broad and diverse.



## Stakeholder Groupings

To address diverse needs, stakeholders are grouped by common needs, common messages.

# Communications Strategy

Leverage a centralized multi-channel communications strategy to drive adoption of BenefitsCal and #EngagePeopleBetter with hyper-targeted messaging to the right people at the right time.

Key tenets of the approach	
<p><b>Lead with Value</b></p> <p>Craft communications that lead with the value statement for the targeted audience.</p>	<p><b>Data-Driven</b></p> <p>Use data to drive the plan, share the right information with Customers at the right time.</p>
<p><b>Keep It Simple</b></p> <p>Communicate with Customers at their reading level and in their preferred language.</p>	<p><b>Timing is Everything</b></p> <p>Send Customer communications at the right time, in segments, based on the Customer's benefits status.</p>

## Communications



### Tactics

Direct Emails  
 Direct Mail  
 SMS Text Messages  
 Social Media Toolkit  
 Flyer, Handouts, Brochures  
 Briefing Packets  
 Swag  
 Call Center Materials  
 How-To Videos  
 Helpful Training Materials  
 Community Event Toolkits  
*Social Media Content / Paid\**



### Messages & Campaigns

Awareness  
 Education  
 Adoption  
 Retention



### Channels

CalSAWS Consortium  
 Counties  
 County PPOCs/IPOCs  
 Social Media

# Planning BenefitsCal Communications



# BenefitsCal Campaigns

Key messages for different phases include awareness, education, conversion, and support.

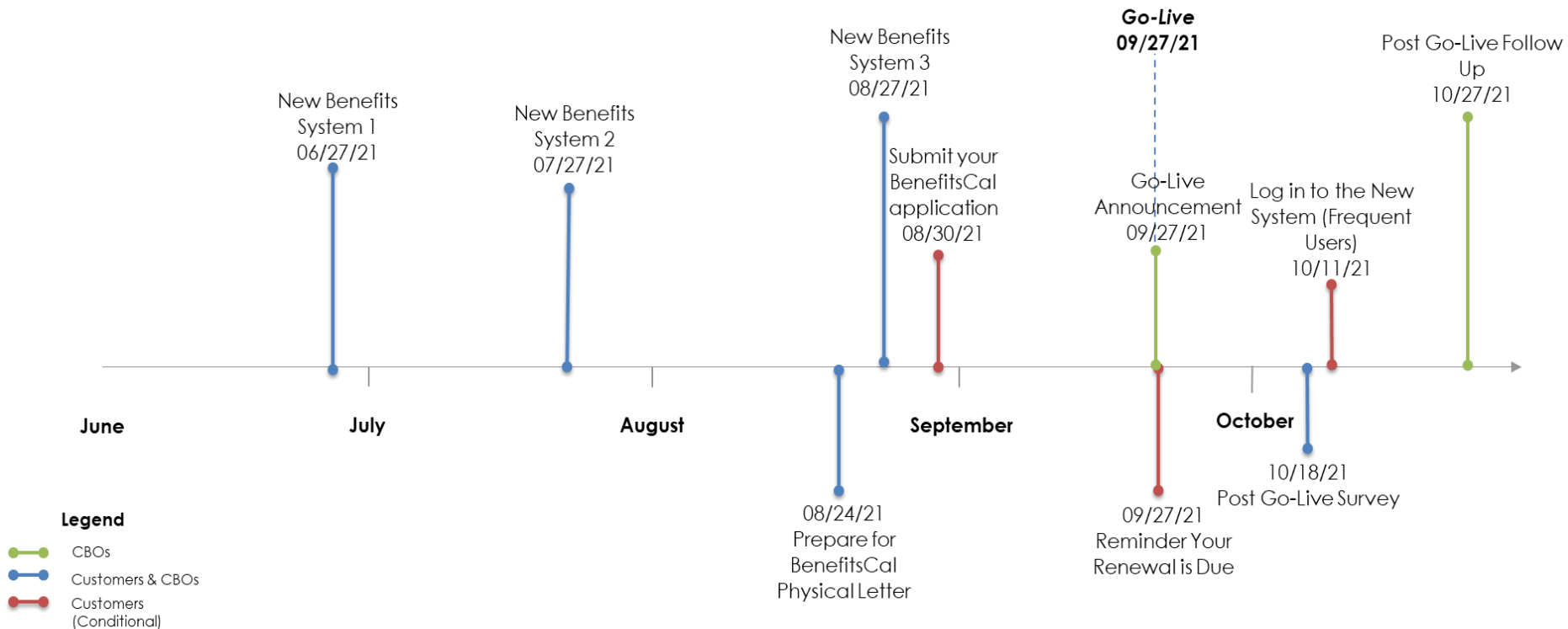
	Examples	Tools	
<b>1 Awareness</b>	<ul style="list-style-type: none"> <li>• <i>What is BenefitsCal</i></li> <li>• <i>Who can use it</i></li> <li>• <i>When is it available</i></li> <li>• <i>Where can I find it</i></li> </ul>	<ul style="list-style-type: none"> <li>• Organic Social Media</li> <li>• Paid Social Media*</li> <li>• Paid Search *</li> <li>• SEO</li> </ul>	<ul style="list-style-type: none"> <li>• Community Event Toolkit</li> <li>• Lobby Toolkits</li> </ul>
<b>2 Education</b>	<ul style="list-style-type: none"> <li>• <i>How do I get started / create an account</i></li> <li>• <i>Training Materials</i></li> <li>• <i>Key Facts (# of apps, Customers)</i></li> </ul>	<ul style="list-style-type: none"> <li>• Social Media Toolkits</li> <li>• Direct Mail</li> <li>• Briefing Packets</li> </ul>	<ul style="list-style-type: none"> <li>• Mass Email</li> <li>• SMS Outreach</li> </ul>
<b>3 Adoption</b>	<ul style="list-style-type: none"> <li>• <i>Call-to-action (Log in today)</i></li> <li>• <i>What do I need to do to log in</i></li> <li>• <i>FAQs</i></li> </ul>	<ul style="list-style-type: none"> <li>• SMS Outreach</li> <li>• Mass Email</li> </ul>	<ul style="list-style-type: none"> <li>• How-to Videos</li> <li>• Training Guides/FAQs</li> </ul>
<b>4 Retention</b>	<ul style="list-style-type: none"> <li>• <i>Post go-live emails and encouragement</i></li> <li>• <i>Surveys to learn more</i></li> <li>• <i>Renewal Reminders</i></li> </ul>	<ul style="list-style-type: none"> <li>• Surveys</li> <li>• Mass Emails</li> <li>• SMS Reminders</li> </ul>	





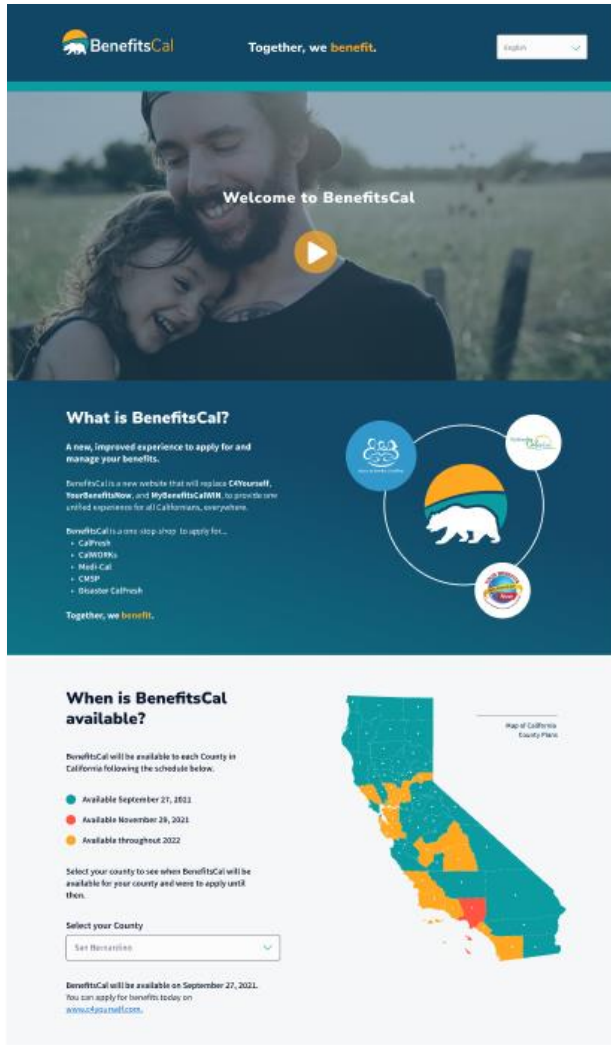
# Example: September Release

## Planned Communications for CBOs and Customers



# BenefitsCal.com

## A go-to resource for project updates



- In the coming weeks, a new BenefitsCal.com website will be published
- Site will include project updates, go-live dates by counties, as well as the **social media toolkit**
- Site will continue to redirect users to C4Y, YBN, or MyBCW as appropriate for current needs



# BenefitsCal Training Plans

## Summary Plans



### How-To Video

*16 videos to assist all users with common tasks.*



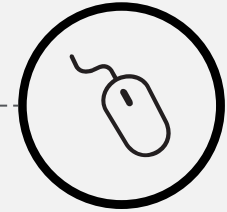
### Quick Reference Guide

*17 quick reference guides to support County Staff and CBOs/FBOs.*



### Job Aid

*1 job aid for System and County Administrators.*



### Training Scenarios

*6 training scenarios that County Staff can use within the Training Environment.*

**Plan**

**April - May 2021**

**Develop**

**June - July 2021**

**Deliver**

**August 2021**

# User Conversion Plans

# User Account Conversion

## Frequently Asked Questions (FAQ)

1

### Which user accounts will be converted?

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Accounts will be converted IF...

- The account has been accessed within the last two (2) years, AND
- The account is linked to an application or case

2

### What do users need to login to BenefitsCal?

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1. Username or Email from the current portal(s)
2. Password from the current portal(s)

No special link or code is required.

3

### What's the first-time login experience like?

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**Easy.**

- User will be prompted to enter missing information
- Users will set a new password

Please see the next slide for a preview...

More information will be shared as we approach go-live (September 2021).

# BenefitsCal Account Conversion

## First Time Login Experience





# Application Development & Policy Update

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# Application Development & Policy Update

- DHCS PHE lift planning
  - MC RE move date expected as a 21.05 priority release (completing mid-June)
  - Participating in DHCS/County workgroup
- CDSS
  - Emergency Allotment guidance received 4/1/2021
    - May 15<sup>th</sup> run for CF EA will be split
      - Feb/Mar under the old guidance
      - April under new \$95 guidance
  - Pandemic Assistance Benefit

# Application Development & Policy Update

Date	Event
May 8, 2021	Earned Income Disregard/Income Reporting Threshold updates
May 15, 2021	CF Emergency Allotments (Feb/Mar/Apr)
May 23, 2021	CalSAWS Release 21.05 ABAWD Phase III
21.05 priorities	MC RE Move date (completing mid-June)
June 12, 2021	CF Emergency Allotments (Mar/Apr/May) tentative
Mid- July	Pandemic Assistance Benefit
July 17, 2021	CF Emergency Allotments (Apr/May/Jun) tentative
August 2021 tentative	CW/CF/FC COLAs for 10/2021



# UAT Update

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# UAT Update

## CalSAWS UAT Readiness Activities



### CalSAWS UAT Kick-off

March 18, 2021 C-IV  
April 19, 2021 LA & CalWIN



### Q&A's

Open Zoom  
Support Calls  
9:00 am – 11:00 am

### Next: Test Scenario Review

- April 19 – May 21 Review, Update, and Create UAT Test Scenarios
- Q&A continues
- Execution prep activities are underway



June 7<sup>th</sup> UAT Execution Kick-off

## UAT at a glance

- CalSAWS UAT Web-Portal
  - 55 Training materials uploaded
  - 332 design documents uploaded
- 8 Q & A sessions completed as of 05/06/21
  - 403 Questions answered
- 869 BenefitsCal Scenarios written
- 959 CalSAWS Scenarios written/Modified
- 55 Imaging Scenarios written
- 45 State reports scenarios written

# UAT Update

## CalSAWS UAT Activities, what is next?

UAT Confirmed Participant selection for Execution					
	CalSAWS	State Reports	Imaging	BenefitsCal	Triage Team
C-IV	305	27	30	45	24
LA			15	15	1
CalWIN				42	8

### **April 19 – May 21, 2021**

- All testers continue to review of training materials and design documents.
- Review, update, and create UAT scenarios and data based on UAT baseline scripts
- Validate UAT CalSAWS environment access
- Continuing to work on defining UAT processes and detailed planning of scenario execution

### **June 7 – June 11, 2021**

- Attend the CalSAWS UAT Execution Kick-Off
- Validate UAT CalSAWS and BenefitsCal environment access, if needed

### **June 14 – August 20, 2021**

- CalSAWS UAT Execution (includes Imaging and State Reports)

### **June 14 – September 3, 2021**

- BenefitsCal UAT Execution



# Conversion Update



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# Conversion

## Overall C-IV, CalWIN, and Ancillary Delivery Progress

Phase	C-IV	CalWIN	CalWIN County Ancillary Systems
<b>Mapping and Development</b>	Complete	Complete <i>w/CalSAWS Functional Area Epics (in March)</i> <b>In-Progress and On-Schedule</b> <i>Cont'd Mapping, Development and Testing w/Data Model Updates between CalWIN and CalSAWS</i>	In-Progress and On-Schedule
<b>EDBC Match</b> <i>(Mapping, Development, and Analysis)</i>	In-Progress <i>Executing and Analyzing with each GDS</i>	In-Progress <i>Planning began in March 2021</i>	n/a
<b>Conversion Validation/System Testing</b>	In-Progress (w/GDS#4) <i>Per Converted Data Release Schedule</i>	In-Progress (March 2021 - March 2022) <i>Initial System Test Execution Planned by November 2021 (for CDT) Approx. 120 test scenarios (query for data, write the script, manually execute, then automate test)</i>	
<b>Conversion Reports</b>	In-Progress <i>Consolidated Case Review Report drafted</i>	In-Progress <i>Planning began in March 2021</i>	In-Progress <i>Automated Framework Exception Reporting/email (to Counties)</i>
<b>Converted Data Release Schedule</b> <i>(Delivery of Converted Data to Project teams)</i>	On-Schedule (w/C-IV GDS#4) <i>Planned Delivery to the Project on 5/20</i>	CalWIN GDS#2 Planned for November 2021	
<b>Converted Data Test (CDT) Support</b>	Complete	Planned Start November 2021 <i>w/CalWIN GDS#2</i>	
<b>Mock Conversions</b>	MC #1: May 2021 <i>(In Progress)</i> MC #2: June 2021 MC #3: July 2021 <i>(County Validation)</i>	Wave 1 Mock Conversion Planned April 2022 <i>(with County Validation in Final Mock for Wave)</i>	
<b>Cutover Schedule</b>	1A – County Prep August 27 1B – Go-Live September 27	Wave 1, 1A – County Prep Late Summer 2022 Wave 1, 1B – Go-Live Fall 2022	



JPA Member Representatives  
Meeting & Conference  
Overview



# CalSAWS Annual Conference

Thursday, June 24, 2021

- Virtual Meeting - Via Zoom
  - Timeline is being confirmed as agenda is developed
  - Invitation was sent to HOLD 8:30 a.m. – 4:30 p.m.
- Requires Quorum of the CalSAWS Member Representatives (58-County Welfare Directors)
  - Additional staff may attend sessions, as needed.
- Elections of the JPA Board and PSC Members
  - Regional calls to develop the election slates will be scheduled soon. Keep an eye out for scheduling request from Jennifer Smith, or Faleesha Andrews.
- Examples of demos to be provided:
  - BenefitsCal Portal
  - Hyland Imaging Solution
  - Analytics
  - Customer Service Center



Adjourn Meeting

