

## CalSAWS | Meeting Minutes for the California Statewide Automated Welfare System WCDS Subcommittee

Date: Friday, November 5, 2021	Location: <a href="#">Click here to join the meeting</a>
Time: 12:00 P.M. to 2:00 P.M.	Conference Call: 1 323-886-6772 Conference ID: 802151393#

**CONVENE MEETING OF THE WCDS SUBCOMMITTEE – Due to the COVID-19 pandemic, all scheduled items will be heard via webcast only to adhere to social distancing guidelines.**

**Or call in (audio only)**

WCDS Subcommittee Members include the following:

County	Member		Region
Alameda	Glenn Wallace for Lori Cox	X	1
Alameda	Anissa Basoco-Villarreal	---	1
Contra Costa	Kathy Gallagher	---	1
Fresno	Delfino Neira	---	4
Orange	Debra Baetz	X	5
Placer	Greg Geisler	---	2
Sacramento	Ethan Dye	X	2
San Diego	Rick Wanne	X	5
San Francisco	Trent Rhorer	---	1
San Francisco	Dan Kaplan	X	1
San Luis Obispo	Devin Drake	---	4
San Mateo	Ken Cole	---	1
San Mateo	Deanna Abrahamian (Co-Chair)	X	1
Santa Barbara	Daniel Nielson	---	5
Santa Clara	Robert Menicocci	---	1
Santa Clara	Angela Shing (Co-Chair)	X	1
Santa Cruz	Julia Sheehan for Randy Morris	X	1
Solano	Jerry Huber	---	1
Solano	Marla Stuart	X	1
Sonoma	Angela Struckmann	X	1
Tulare	Anita Ortiz	---	4
Tulare	Vienna Barnes	---	4
Ventura	Melissa Livingston	X	5
Yolo	Nolan Sullivan	---	2

## PUBLIC SESSION

### 12:00 P.M. – Convene Meeting of the WCDS Subcommittee

Topic	Lead	Est Time
1. Call Meeting to Order  Meeting called to order at 12:04pm.	Angela Shing	1 min
2. Roll Call and Confirmation of Quorum  See above for attendance; quorum met.	Angela Shing	3 min
3. Public Comment  Public opportunity to speak on any Item 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 Co-Chair to speak.  No questions or comments.	Angela Shing	1 min
<b>Action Items</b>		
4. Approval of the Minutes and review of the action items: 4.1 August 6, 2021, WCDS Subcommittee	Angela Shing	5 min
<b>Motion</b> <ul style="list-style-type: none"><li>• Motion to Approve: Debra Baetz/Orange</li><li>• Seconded: Deanna Abrahamian/San Mateo</li></ul>		
<b>Vote</b> <ul style="list-style-type: none"><li>• In Favor: Alameda, Orange, San Diego, San Francisco, Santa Clara, Santa Cruz, Solano, Sonoma</li><li>• Abstain: Sacramento</li><li>• Motion carried</li></ul>		
<b>Informational Items</b>		
5. WCDS Subcommittee JPA Board Members Update	Delfino Neira Kathy Gallagher	10 min

No updates, comments or questions.

Debra Baetz  
Melissa Livingston

Congratulations to Ethan Dye for his appointment as Director for Sacramento County.

## 6. Stakeholder Updates

10 min

- CDSS

### **Rocky Givon/CDSS**

There has been an uptick in EBT skimming and scamming. Counties will see EBT alerts with scam details such as card cloning. Counties are asked to continue reporting incidents to CDSS' Inbox.

The State has been looking into reports of CalFresh application fraud using the CalFresh application. CDSS is working closely with counties and SAWS partners to understand how fraud is occurring and how to mitigate. CWDA established policy and program integrity directives that will be shared with contact information.

CDSS Integrity Team email: [pibpolicyunit@dss.ca.gov](mailto:pibpolicyunit@dss.ca.gov)

No questions or comments.

### **Katie Mead/DHCS**

Public Health Emergency has been extended to January 16, 2022. DHCS continues to work with SAWS, Counties and CWDA on the unwinding of the PHE.

DHCS will be publishing ACWDL 21-21 soon that supersedes outdated Medi-Cal suspension policies and introduces unlimited suspension for juveniles/incarcerated individuals per the support pack.

Comment: It is unknown at this point in time if PHE will truly end on 1/16/22 or if another final extension will be issued.

### **Brandon Hansard/OSI**

OSI is monitoring, through their IV&V contractor, C-IV migration into CalSAWS to include system status and imaging status; lessons-learned will be applied to CalWIN's upcoming migration.

OSI and CalSAWS started preliminary discussions on considerations for the upcoming IAPDU. Will continue working with sponsors.

**Christiana Smith/CWDA**

No updates.

No questions or comments.

7. CalSAWS Updates	Seth Richman	15 min
7.1 Update on C-IV and BenefitsCal Go-Live	Rachel Frey	

Seth Richman is now Project Advisor.

*(Note: Stats referenced herein are updated from those presented in slides)*

**Slide 11 – CalSAWS - Summary of Successes:** Accenture is meeting the batch window most of the time; sometimes they go beyond 6am. Reporting dashboards are not always completely refreshed by 6am. Accenture will correct and ensure they will be prepared for CalWIN's migration and ultimately managing 58 counties. Their processes put in place are showing good progress, including generation of some reports completing a day or two early. Response times are in line with SLAs. Staff log-in stats are 20K +/- per day. As expected, Accenture is seeing ten million transactions per day within CalSAWS. There are 150 defects outstanding; none are severe. Imaging has been the most challenging. Since 10/15, performance SLAs have been met.

**Slide 12 – CalSAWS - Summary of Focus Areas:**

Lessons-learned gained around performance testing. Accenture's model for how the system is used focused on LRS' usage pattern not C-IV's which differ. Accenture aligned accordingly and quickly. There was one four-hour outage on 10/5 due to technical problems and the database stopped responding. The problem was corrected with storage device enhancements and data access adjustments; the root cause will be determined. LRS' imaging cutover has been deferred from 11/22/2021 to February/March 2022 to allow time for Accenture to scale-up to LRS volumes with implementation of performance improvements. Correspondence is Accenture's biggest functional area of focus; they are bolstering change management considerations when planning between LRS and C-IV. Fiscal and eICT experienced smaller issues recently such as training and print. Print was configured for CalSAWS, but not C-IV. For eICT, inner and intra transfer work differently between LRS and C-IV; Accenture is sorting that out. The

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same scenario applies to varying processes in report reconciliation. Accenture improved communications around the changes/processes made and how to use functionality.

**Slide 13 – Communications – Fact Sheets:** Accenture improved communications with Fact Sheets containing information on changes/processes made and how to use functionality.

**Slide 14 – C-IV vs. CalWIN Cutover Experience:** The cutover experience will be different for CalWIN than for C-IV. For C-IV, although the system is similar to LRS, the process impact was underestimated. More time could have been spent on deciphering the differences between the two. The CalWIN strategy has implementation support for each county and differences are being identified. Training will be different for CalWIN as well. Staff will be trained with actual instructors and have self-service training. Testing strategies for process and functionality are being discussed. For the first time, data from all 58 counties is now in one database. Testing of converted data is in its early days and will span 8 months. Accenture needs to ensure the performance test model represents CalWIN's business for the core application and imaging. They will double the size of imaging.

**Slide 15 – BenefitsCal, Summary of Focus Areas:** After BenefitsCal Go-Live, Legacy accounts were to be converted into the new system, however there were adoption challenges for some clients/users such as log-in. Accenture implemented supports to assist clients in navigating through, improved processes for application transfers, updated office mapping routing, and identified two changes for the GetCalFresh release.

**Slide 16 – Overview of CX Measurement:** As of this morning, the system has received over 100K applications this past month. By end of October, 380K were received. As of Tuesday, 500K documents have been uploaded since Go-Live. That translates to over 100K clients not calling EBT centers or counties because they are going online. Nearly 350 CBOs have created accounts. Accenture's strategy around MobileFirst was the right approach; most users are accessing information from a tablet or mobile phone. Seeing an uptick in reporting usage. Of 78K applications, 10% came in as combo applications without much outreach or advertising of BenefitsCal.

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**Slide 17 – Customer Account Activity:** To date, 110k users have created BenefitsCal accounts. On average, there are 18K daily unique log-ins.

**Slide 18 – CBO Account Activity:** Approximately 325 accounts have been created with 40% daily log-ins supporting clients needing assistance.

**Slide 19 – Submitted Applications:** 40% of clients are completing in 30 minutes or less, depending on how much information is being entered. CBO stats demonstrate increased proficiency in submission time with each application.

**Slide 20 – BenefitsCal, CX Measurement in Action:** Stats showed clients dropping off at Signature page. With verbiage changes made, drop-off rates decreased significantly. Stats also show an 82% improvement rate in log-in errors as a result of usability changes made.

**Slide 21 – R1.1 BenefitsCal Application Readiness:** R1.1 and R1.2, deployed in October, allow clients to renew and recertify their benefits. The verbiage and navigation changes in these releases were from Advocates and State partners. We continue to seek their input.

**Slide 21 – R1.2 BenefitsCal Application Readiness:** Included change for clients to complete SAR7s online. CBOs can now do upload verification documents.

There is another release scheduled for this month to include GA/GR, clients' ability to request new/replacement cards and tax assistance.

## 7.2 Gantt Chart Review

**Slide 24 – CalSAWS Project Gantt - App-Dev & Test, Conversion, and Imaging:** Slide reviews CalSAWS consolidated core tasks. To highlight, orange diamonds indicate application code releases. The system will be kept current to policies. Converted data testing is our key focus right now; need to ensure data works within the system. Mock cutovers are being conducted for each wave. Imaging performance testing is a primary focus throughout each wave.

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**Slide 25 – CalSAWS Project Gantt - BenefitsCal:** Three releases scheduled for next April will include adding threshold languages and CalWORKs 2.0.

**Slide 26 – CalWIN Implementation Support:** To be discussed in detail later in meeting.

**Slide 27 – Central Print:** Cutover went extremely well. First and second phases are complete. Gainwell is providing ongoing support.

No questions or comments.

8. Conversion	Paul Trisler	15 min
8.1 Data Conversion	Keith Salas	
8.2 Converted Data Testing	Michael Johnson	

**Slide 29 – Conversion Updates:** Post C-IV Go-Live went, and is going, well. The Conversion Team was ahead of schedule a bit. CalWIN is of focus now. Legislation and policy changes for M&O continue. There are bi-monthly releases into CalSAWS and quarterly releases for CalWIN. CalWIN is currently at R66. CalSAWS Release 21.11 is just starting. The Conversion Team is keeping up with both systems. Ancillary systems for CalWIN counties are an ongoing mapping effort. Counties are now delivering data to the Conversion Team for integration into the core CalWIN conversion. The Conversion Team produces golden data sets for the project; a system test effort is conducted prior to golden data sets being released.

Converted Data Testing started 11/1/2021. Converted data in CalSAWS is being used on an ongoing daily basis for counties. We want to catch any issues before mock cutover.

Over the life of the CalWIN conversion, there will be approximately 20 golden/converted data sets that will be released to CalSAWS. Golden data sets are also used for running EDBC match; a process learned from the LRS conversion that was beneficial. EDBC is run and compared against the previous CalWIN EDBC. If data matches, the case will be flagged to indicate as such; the county worker will not need to validate the case after go-live. It is a large effort, but one that provides value to counties.

Conversion reports: Balance Reports were generated for C-IV. Rows, programs, persons, cases, benefit sums, etc. are

counted as data is processed/received from Gainwell, et.al. to ensure that all balances. During the cutover period, Balance Reports are checked at various stages. If all align, then a Go is recommended to executive leadership. Exception Reports are also created for data that did not match. A third report reviews findings of ancillary system data when brought into CalWIN conversion.

First mock conversion will be in June 2022. Mock conversions are web-based.

Cutover is set for October 2022.

No comments or questions.

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#### 9. CalWIN Implementation Support Services Update

Juli Baker  
Renee Carter  
Duncan Gilliam

15 min

**Slide 31 – Wave 1 Timeline, Contra Costa, Placer, Yolo:** The Project is working hard with all 18 counties and focusing on Wave 1 going live in October 2022. See timeline and workstreams. Counties are impacted by more than the workstreams presented; there are others in the project. The Business Process Reengineering and Organizational Change Management Plans are complete. There are a few open items to wrap. Recruitment for Change Network Champions will start in December; CNC's will assist with Change Discussion Guides. A Communication Plan is underway. The Training Advisory Group continues monthly and is incorporating county input into the training approach. Materials and Journey Maps are underway. Classrooms for each county are being identified. Lessons-learned are being gleaned from the C-IV implementation.

**Slide 33 – BPR To-Be Schedule Update:** Wave 1 is complete. Wave 2 is nearly complete. Wave 3's mapping is underway. With counties' agreement, the schedule has been adjusted for Wave 4 through 6 to allow more time between sessions.

**Slide 34 – BPR To-Be Status:** There is much in flight at the project; schedules are being aligned accordingly to ensure counties are supported as needed. Wave 1 final sign-off on work products is done. Wave 2 final sign-off on work products is due today or Monday. For Wave 3, Santa Barbara's sessions are in progress. Orange and Ventura will follow and should complete by end of the year. Waves 4, 5 and 6 sessions will run January through July 2022.

**Slide 36 - Organizational Change Management, Wave 1 Timeline (Contra Costa, Placer, Yolo):** The initial Baseline Change Readiness Survey will be sent on 11/15 and close 11/30. Change Network Champions will be engaged with the first Kick-Off meeting in January. Readiness surveys will be circulated throughout the timeline to monitor counties' preparation progress and identify where support is needed. In March, the first set of County Team Discussion Guides will be shared; guides describe in detail the changes made.

**Slide 37 - OCM POC Meeting – Previous & Upcoming Topics:** Slide lists the meeting topics and activities covered to date. Wave 1 counties will be engaged in the development of the Change Discussion Guides. Waves 1 and 2 counties will submit selections for CNCs via CRFI response in December.

**Slide 39 - Training Advisory Council (TAC) – Previous & Upcoming Topics:** Training design is well underway. Current focus is on the eligibility program courses. Completed designs have been presented to TAC for feedback. The first Learning Journey Map demonstration will be given in November.

**Slide 40 – Training Approach for CalWIN Counties:** Web-based training on core functionality will be given, followed by classroom training on global changes and process impacts. The Learning Journey Maps will keep staff aligned with activities. Prior to Go-Live, staff will be reengaged with rules-specific scenarios to practice within the CalSAWS environment. Open office sessions will be provided for targeted training. TAC will provide feedback on training progress along the way.

**Slide 42 – Implementation Update:** Working collaboratively is key for a successful implementation. The Contact Center has met with each Wave 1 county individually to understand needs – dependencies, key milestones, county responsibilities to include in the checklist and readiness guides, assessments, etc. Deloitte has been working closely with the Conversion Team. The second Conversion Review Guide has been issued and conversion impacts prioritized, with emphasis on CalWIN counties. Gainwell demonstrated their data cleansing tool; new data will be added into the tool in early 2022. Transparency with counties around activities and key functions is critical. For QA, understanding timing of cutover activities is important. For Security, working to be as proactive as possible to have holistic information.

No questions or comments.

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#### 10. Central Print Update and Planning Activities

Dawn Wilder

10 min

**Slide 44 – Timing:** The objective is to migrate 56 of 58 counties into Central Print. Phase 1 (Los Angeles) and 2 (C-IV) were successfully completed. Phase 3 for CalWIN counties begins 10/2022 and will be implemented in six waves. Contra Costa and Tulare will determine by end of 2021 if they will opt in.

**Slide 45 – Solution.** The Central Print solution includes three separate print facilities; each able to handle overflow from one another and serve as a disaster recovery site. The pre-processing step aids in quality control, pre-sorting and gives the ability to support counties' specific requests.

**Slides 46 to 48 – Upcoming County Activities:** Each wave will have a series of events, including a kick-off meeting, Print and Postage POC identification, configuration meeting, validation meeting, Central Print portal user identification, postage deposit completed, and Central Print portal training.

Lessons-learned taken from Waves 1 and 2 will be applied to Waves 3 through 6 and adjustments made accordingly.

No questions or comments.

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#### 11. ClearBest QA Update 13200

Wendy Battermann

10 min

**Slide 50 - How Does QA Fit into the CalWIN Migration Efforts?:**

ClearBest provides quality assurance expertise in Project Management, Design/Build/Conversion Reviews, Readiness Reviews, SCR Analysis, Testing and M&O performance. See slide for specific responsibilities.

**Slides 51 and 52 - How Are We Supporting CalWIN Migration?:**

QA provides an independent and systemic assessment of CalSAWS activities to ensure quality is achieved across all areas. ClearBest ensures collaboration between vendors, identifies design gaps, ensures requirements are met, supports UAT, conducts testing, brings forward lessons-learned, plans and monitors communications, supports county and project readiness and mitigates and escalates risks.

No questions or comments.

Topic	Lead	Est Time
12. CalSAWS Financial Update (SFY 2021/2022)	Holly Murphy	5 min
<p><b>Slide 55 – Financial Dashboard:</b> We continue to update allocations and projections for the new fiscal year. Variance includes a premise item for C-IV that is no longer applicable, CalHEERS savings, as well as C-IV and LRS savings.</p>		
<p><b>Slides 56 and 57 – Consortium Personnel Budget &amp; FTEs:</b> We closed a recruitment last week for several positions and are currently working through the candidate review process.</p>		
<p><b>Slide 58 – Change Budget (Application Maintenance / M&amp;E Hours):</b> To reiterate, we have savings with CalHEERS, C-IV and LRS.</p>		
<p><b>Slide 59 – Contract Obligations:</b> There is one additional LD applied in August under CalWIN for a system availability issue that occurred in May.</p>		
<p><b>Slide 60 – Change Notice Tracking:</b> Change notices are approved by the JPA; the slide reflects those approved as of their October 2021 meeting.</p>		
<p>No questions or comments.</p>		
13. Policy Update	Lynn Bridwell Diane Alexander	10 min
<p><b>Slide 62 – CalFresh Emergency Allotments (Max Allotments):</b> For July, August and September, \$185MM in CalFresh emergency allotments were issued. Emergency allotments issued in November will increase with the addition of the COLA. Thresholds will be confirmed with counties.</p>		
<p><b>Slide 63 – CalFresh Automated Mass Replacements (AMR):</b> The Project is working with the counties impacted by the 10/11 and 10/12 outages. Issuance is tentatively scheduled for 10/31. For the next round, CDSS is still in discussions with FNS.</p>		
<p><b>Slide 64 – Release 67 High-Level Highlights:</b> R67 implements on 11/15 and includes:</p>		
<ul style="list-style-type: none"> <li>• CalWORKs (two long-awaited changes) <ul style="list-style-type: none"> <li>◦ CalWORKs Child Support Disregard Increases (PPM#58208)</li> <li>◦ EBT Issuance for Homeless Assistance</li> </ul> </li> <li>• Medi-Cal</li> </ul>		

- Redesigned MAGI/Non-MAGI Medi-Cal Annual Renewal Forms to be automated in MyBenefits CalWIN
- GA/GR-Correspondence
  - CW5-New automated variables
  - SSP14-New automated variables
  - GA/GR Appointment Letter – Consortia Form

**Slide 65 - CalWIN Release Delivery Impact:** Shows the portfolio overview. For R68 and 68B, there are significant changes coming for CalHEERS and core CalWIN. See slide for details. As we enter 2022, we already have some major scheduled policy changes that we are coordinating closely with CalSAWS on to minimize impacts to conversion activities.

No questions or comments

14. Operations Update	Henry Arcangel	10 min
14.1 County POP & MR Server Decommission		
14.2 CalWIN (HP Superdome) Server Upgrade		

**Slide 68 through 80:** Counties' POP and MR servers have been removed and the Project is centralizing the solution. See Slide 69 for detail on how servers were decommissioned.

The CalWIN/HP Superdome Server houses Tuxedo transactions, nightly batch run and CIS. New CPUs were added to improve performance. See graph for metrics. Memory will be added as well.

No questions or comments.

15. WCDS Subcommittee Meeting Schedule	Diane Alexander	5 min
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**Slide 73 - 2022 WCDS Subcommittee Meeting Schedule:** Meeting invites for 2022 will be sent shortly.

No questions or comments.

John Boule was not able to attend today's meeting and sends his apologies; he will attend January's session.

16. Adjourn Meeting	Angela Shing	
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Adjourned at 1:58pm.

Next Meeting – January 14, 2022

### Action Items - None

ID	Date Opened	Action Item	Assigned to	Status / Closed
	No			

### Public Notice

As allowed by Governor Gavin Newsom's Executive Order N-29-20 the following Brown Act provisions are **suspended** during the COVID-19/Coronavirus emergency:

- That the location from which each member participating via teleconference be noticed on the agenda for the meeting that member is participating via teleconference.
- That each teleconference location be open and accessible to any member of the public.
- That each teleconference location be equipped to allow comments from any member of the public wishing to make a public comment.
- That an agenda be posted at each teleconference location.
- That a quorum of members of the legislative body participate from teleconference locations within the local agency's jurisdiction

The agenda and supporting documents are available for review via <http://www.calwin.org/bod.asp> and <https://www.calsaws.org/meetings/wcds-subcommittee/>.

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