CalSAWS |

WCDS SUBCOMMITTEE MEETING AGENDA PACKAGE

Friday, November 5, 2021
12:00 P.M. – 2:00 P.M.

Virtual Meeting
Dial-In: 1 323-886-6772
Conference ID: 802 151 393#

Meeting Reminder

Please:

1. Mute phone when not speaking
2. Do not put your phone line on hold
3. Unmute and identify yourself to speak and limit background noise

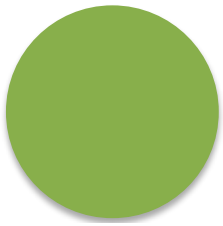
Agenda

1. Call Meeting to Order
2. Roll Call and Confirmation of Quorum
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.

- *See supplemental document for full agenda.*

Action Items



Action Items

4. Approval of the Minutes and review of the action items:
   a. August 6, 2021, WCDS Subcommittee

Refer to attached supplemental document.

Informational Items

5. WCDS Subcommittee JPA Board Members Update

- Delfino Neira
- Kathy Gallagher
- Debra Baetz
- Melissa Livingston

6. Stakeholder Updates

- CDSS
- DHCS
- OSI
- CWDA

7. CalSAWS Updates

- 7.1 Update on C-IV and BenefitsCal Go Live
- 7.2 Gantt Chart Review

7.1 Post Go-Live Review

- CalSAWS
  - Key Successes
  - Focus Areas
  - CalWIN Experience Differences

- BenefitsCal
  - Focus Areas
  - Metrics
  - Upcoming Changes/Enhancements
    - Review of Releases 1.1, 1.2, and 2.0

Post Go-live Review

CalSAWS - Summary of Successes

- Nightly Batch is doing well
- Initial reports generation completed earlier than expected
- Core CalSAWS response times are in line with Service Level Agreements (SLA) and pre-go-live performance levels
- Worker transaction processing approaching pre-cutover volumes
- Defects – trending down and getting more specific e.g., a case or subset of cases
- Imaging performance has improved

Post Go-live Review

CalSAWS - Summary of Focus Areas

- **CalSAWS System performance –** Identified root cause as slow running query behind Eligibility Workload Inventory – fixed in 9/28 priority release
- **Availability** - On Tuesday, October 5th, the primary CalSAWS Core database became unresponsive at 7:30am. Following mitigation activities, CalSAWS was brought up on the stand-by database at 11:15am. Root cause is under investigation
- **Imaging performance –** While improvements have been deployed, there is more to do
- **Correspondence –** Expectations and Policy Interpretations for State NOAs and forms
- **Fiscal** – Isolated incidents affecting Local Warrant Printing, Direct Deposit, Homeless Assistance, and FIS-EBT timeouts
- **eICT** – Isolated occurrences of inability to initiate an ICT are being investigated. Scenarios appear to be focused around ICT to and from LA County where the individual was previously on aid in the sending and / or receiving county

Post Go-live Review

CalSAWS – Communications – Fact Sheets

Created and distributed Post-Deployment Fact Sheets based on a communication need identified from County questions.

Topics include:

- Enabling E-Signature Text Messages
- Homeless Assistance Program
- How to Request Signed Documents
- How to Update EBT Printers
- Imaging Overview
- Imaging Workflow Queues
- Instructions for Adding New Users in CalSAWS
- Local Warrant Print
- Notice of Missed Interview
- Print Options
- Scanning Error Resolution 'No Device Found'
- Session Timeout Functionality
- Supported Browsers
- Viewing Qlik Reports in Internet Explorer
- Client Correspondence FAQs

Post Go-Live Review

C-IV vs. CalWIN Cutover Experience

- C-IV Cutover – process impacts were underestimated
- CalWIN Experience will be different
  - Strategy includes additional services to support the CalWIN Counties
  - Close coordination of CalWIN ISS team with CalSAWS Application and Technical teams
- Initial Focus on Converted Data Test
- Emphasis on Performance
  - Modified performance test models – coordinate with CalWIN ISS to confirm process models are accurate
  - Focus on Imaging
    - LA Cutover
    - CalWIN wave-based approach

Post Go-live Review

BenefitsCal - Summary of Focus Areas

- **Customer Login –** C4Y legacy users that had accounts converted had challenges with establishing accounts, introduced usability change and data change. Additional usability change planned.
- **Usability Items** – identification of changes to enhance usability to be introduced in near term releases
- **Application Transfers** – identified two changes in the transfer process. Production operations processes to address until changes introduced.
- **GetCalFresh Support** - worked with GCF to support triage of items encountered. Two changes identified for a future release.
- **Office Mapping** – some tasks/docs/applications were being routed to ZZ offices needing updates to the routing

Overview of CX Measurement

BenefitsCal impact during the first month in production

Applications Submitted

77,639

households took the first step to receive food, cash, and/or medical assistance.

Documents Uploaded

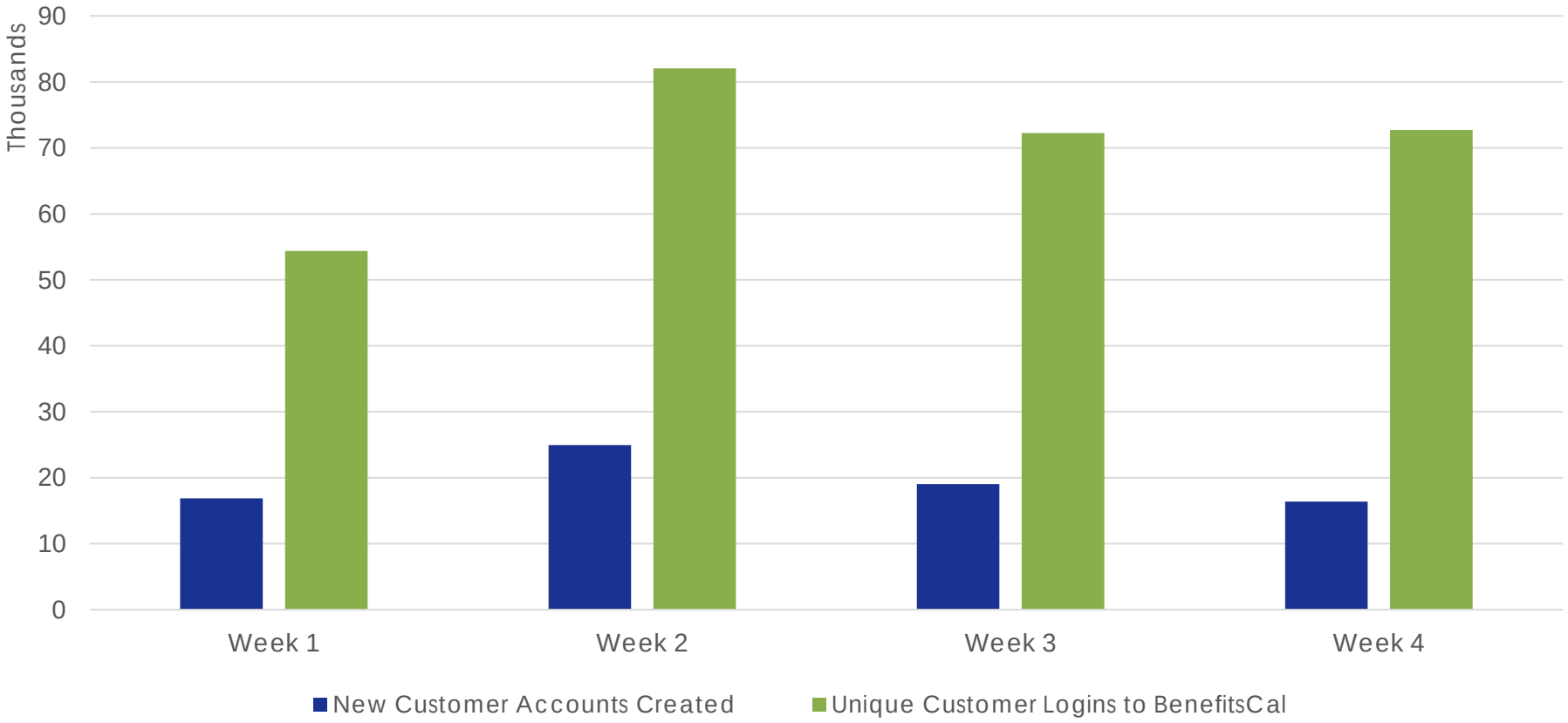
381,884

sheets of paper saved from printed verifications + time saved by reducing steps to share documents.

96,192	households empowered to manage their benefits, view their EBT balance, and view messages.
253	CBOs are now equipped to assist customer on BenefitsCal.
71%	households applied for benefits directly from the palm of their hand with a mobile device.
8,931	households reported a change for the first time on an online portal.
9,740	households completed one application to be considered for eligibility for multiple programs.

Customer Account Activity

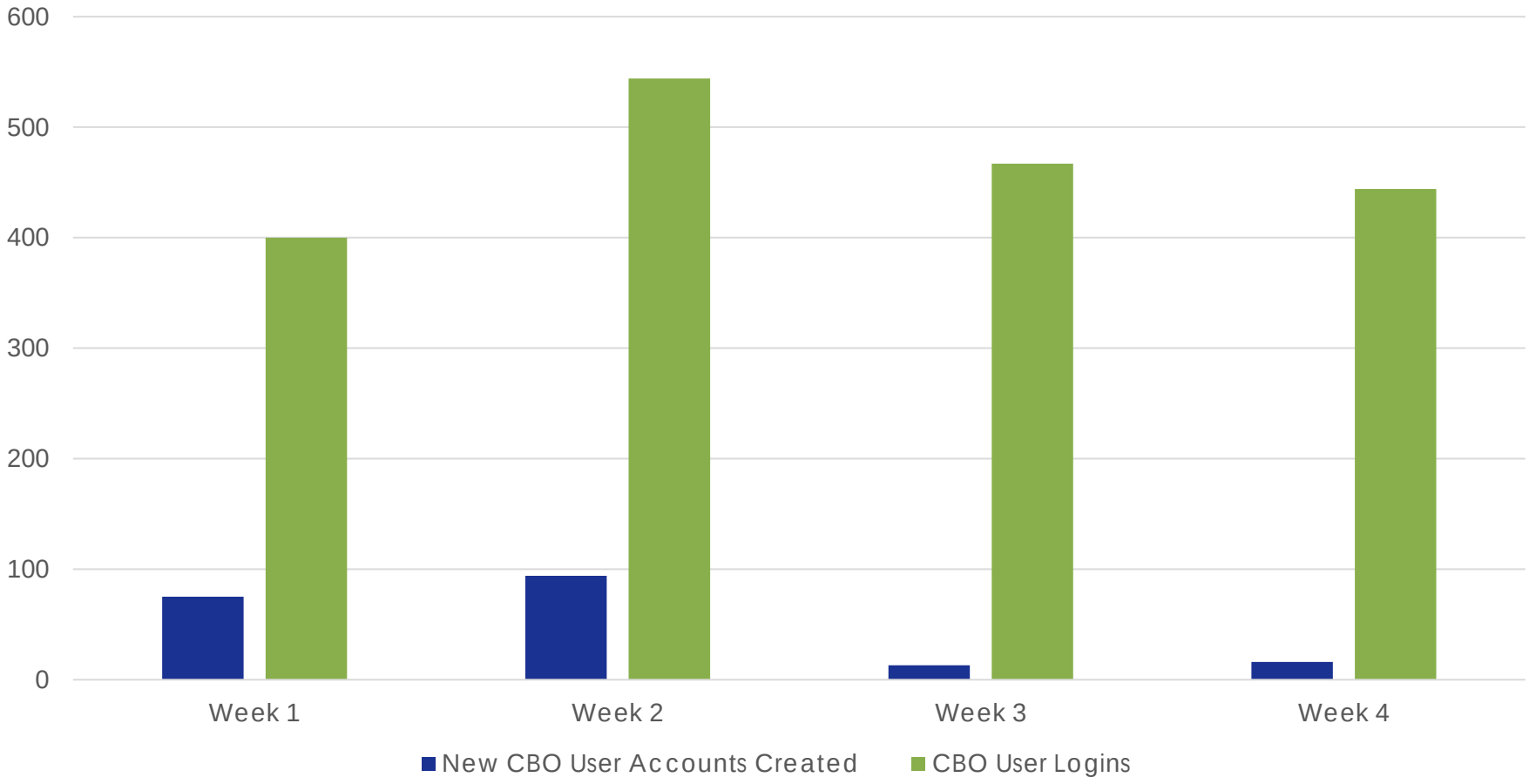
96,192 customers have created BenefitsCal accounts, with an **average of 14,810 unique logins per day** between September 27th and October 24th



*Weekly totals are based on data that was collected between 9:00AM to 5:00PM PST.

CBO Account Activity

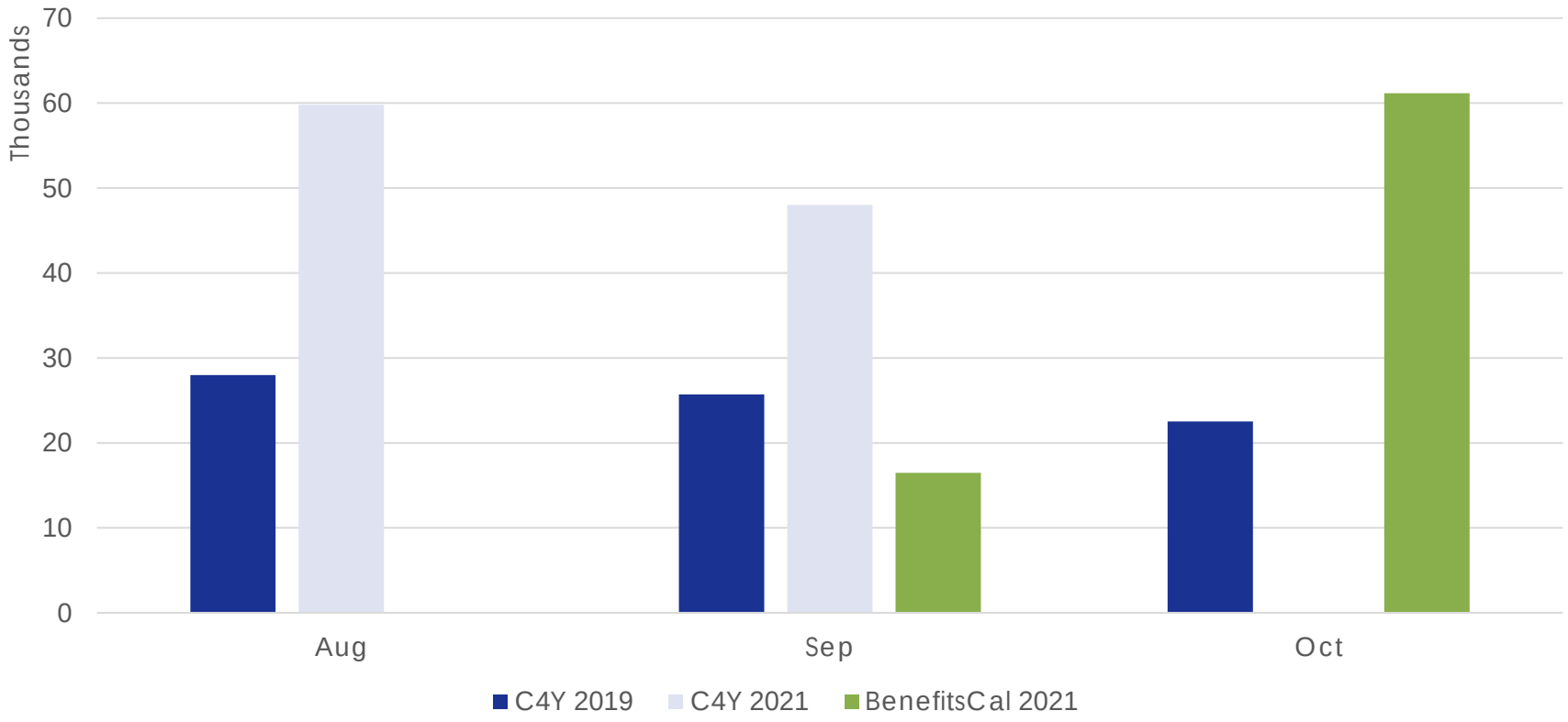
253 CBOs have created BenefitsCal accounts, with an **average of 98 unique logins per day** between September 27th and October 24th



*Weekly totals are based on data that was collected between 9:00AM to 5:00PM PST.

Submitted Applications

77,639 customers have submitted an application between September 27th and October 24th



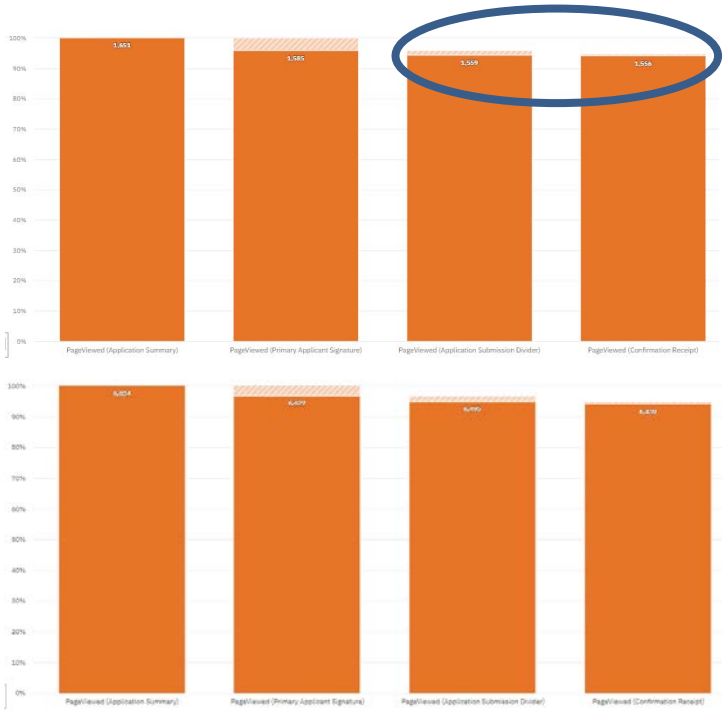
TIME TO COMPLETE THE APPLICATION
(excludes GCF)

9%	30%	22%	14%	24%
0 – 15 min	16 – 30 min	31 – 45 min	46 – 60 min	61+ min

65,427	9,849	11,478
CalFresh	CalWORKs	Medi-Cal

BenefitsCal: CX Measurement In Action

Team monitors the customer experience, and proactively responds to findings (in some cases within 36 hours) to implement a change to improve the CX.



82% improvement

Login errors reduced by more than 82% after implementing the change whereby customers were prompted to create new accounts

Button Labels

- With “Submit Signature”: 3% drop off
- After updating to “Next”: 0.4% drop off

Create New Account *(simpler than)* logging in with legacy credentials

Release 1.1

BenefitsCal Application Readiness

Release 1.1 deployed on 10/10/21:

- CalFresh Recertification (CF37)
- Medi-Cal Renewal (MC210/216/217)
- 1 Priority 1 Advocate Requested Change
- 5 Priority 2 Advocate Requested Changes
- 5 Usability Changes
- 16 State Partner Validation Requested Changes

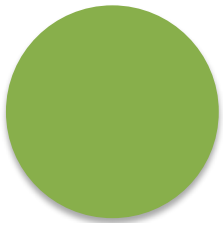
Release 1.2

BenefitsCal Application Readiness

Release 1.2 deployed on 10/24/21:

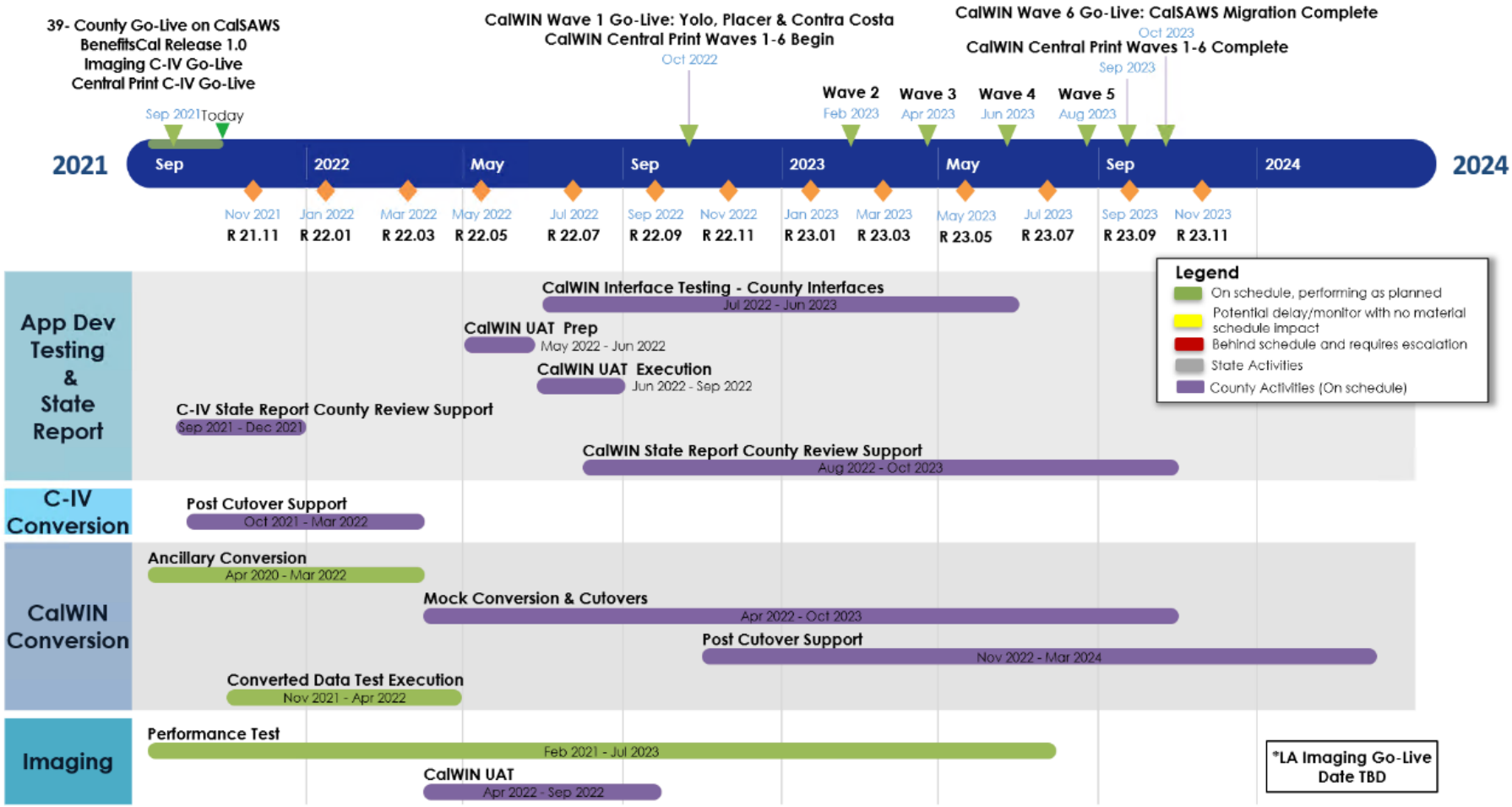
- Periodic Reporting (SAR7)
- CBO Document Upload (SAR7 and later docs)
- 5 Advocate / State Partner Requested Changes

7.2 Gantt Chart Review



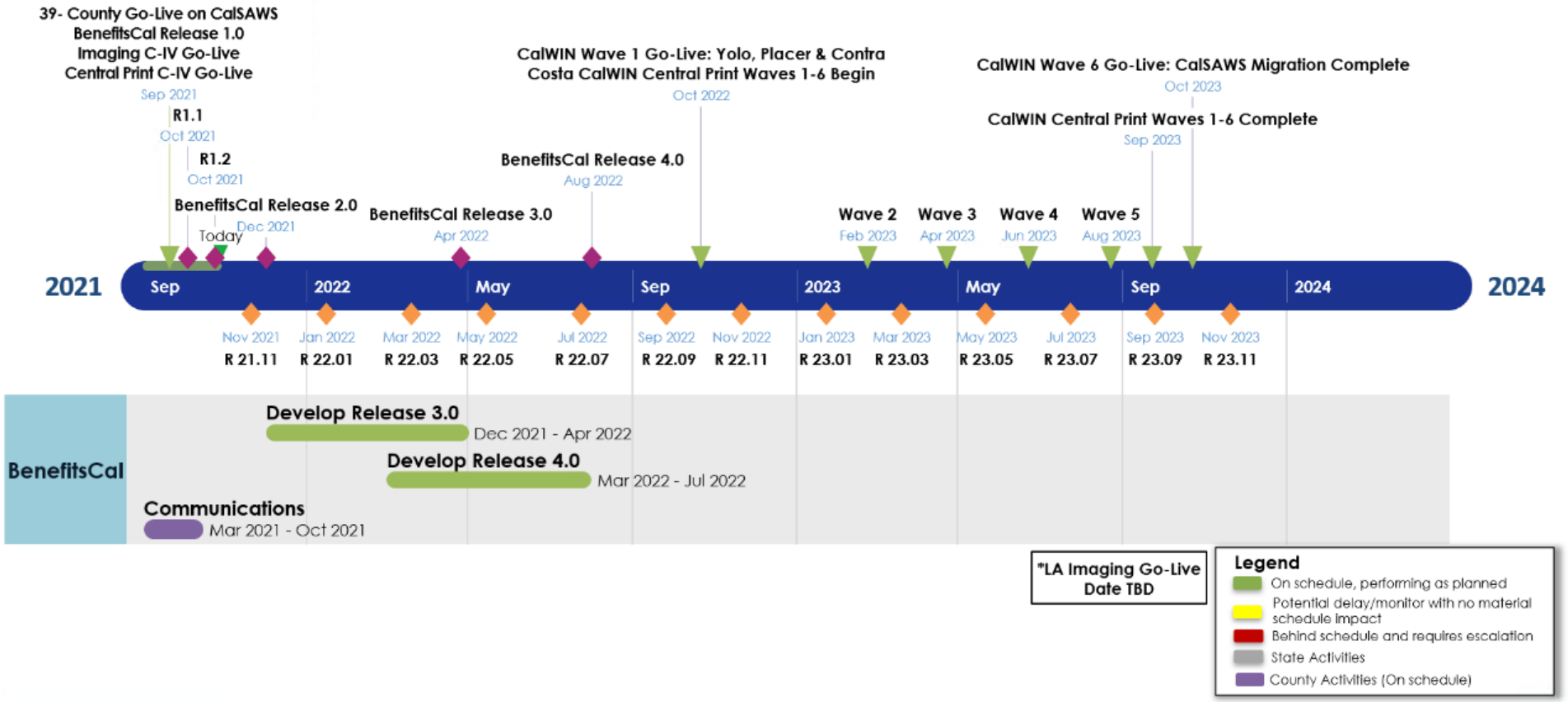
CalSAWS Project Gantt

High Level Overview – App-Dev & Test, Conversion, and Imaging



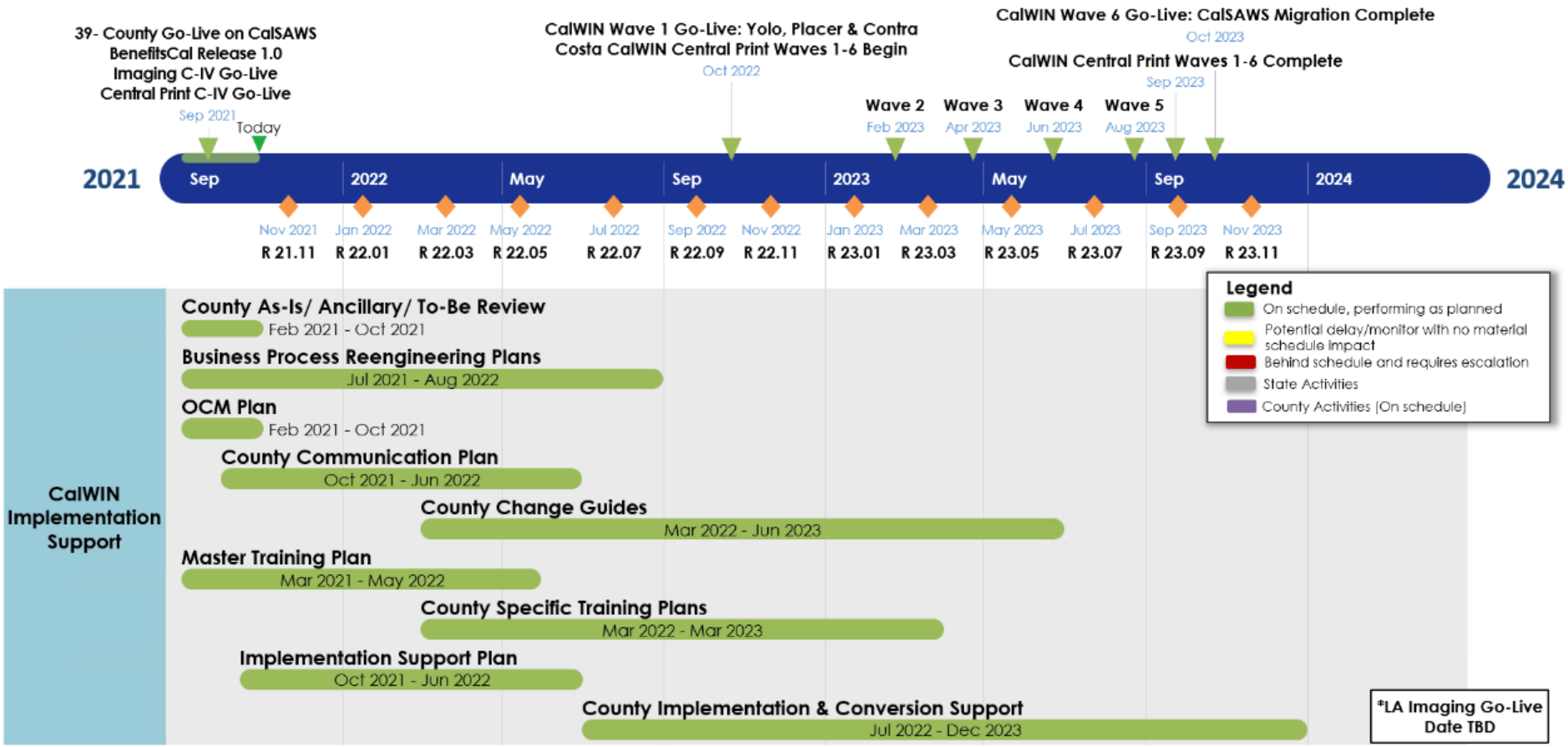
CalSAWS Project Gantt

High Level Overview – BenefitsCal



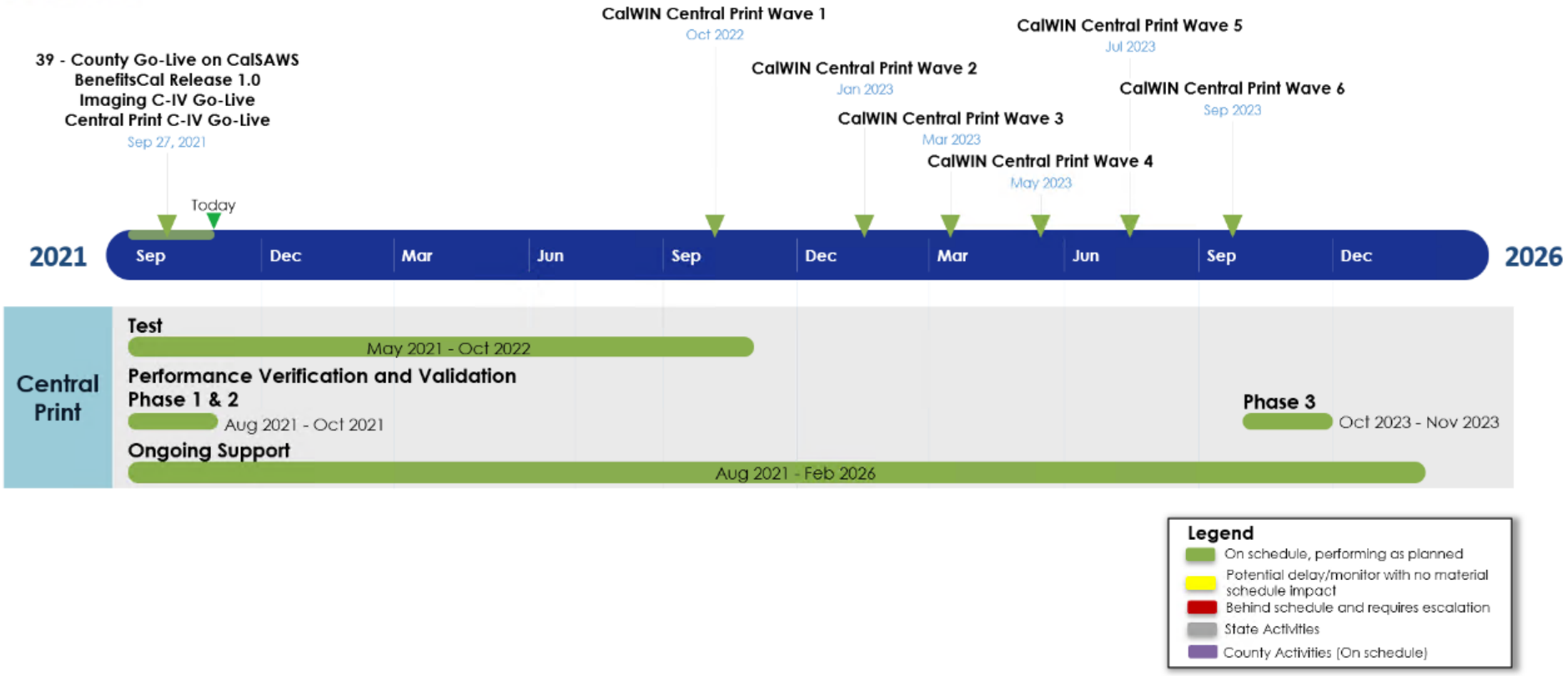
CalSAWS Project Gantt

High Level Overview – CalWIN Implementation Support



CalSAWS Project Gantt

High Level Overview – Central Print



8. Conversion

8.1 Data Conversion

8.2 Converted Data Testing

Conversion Updates

Overall Status

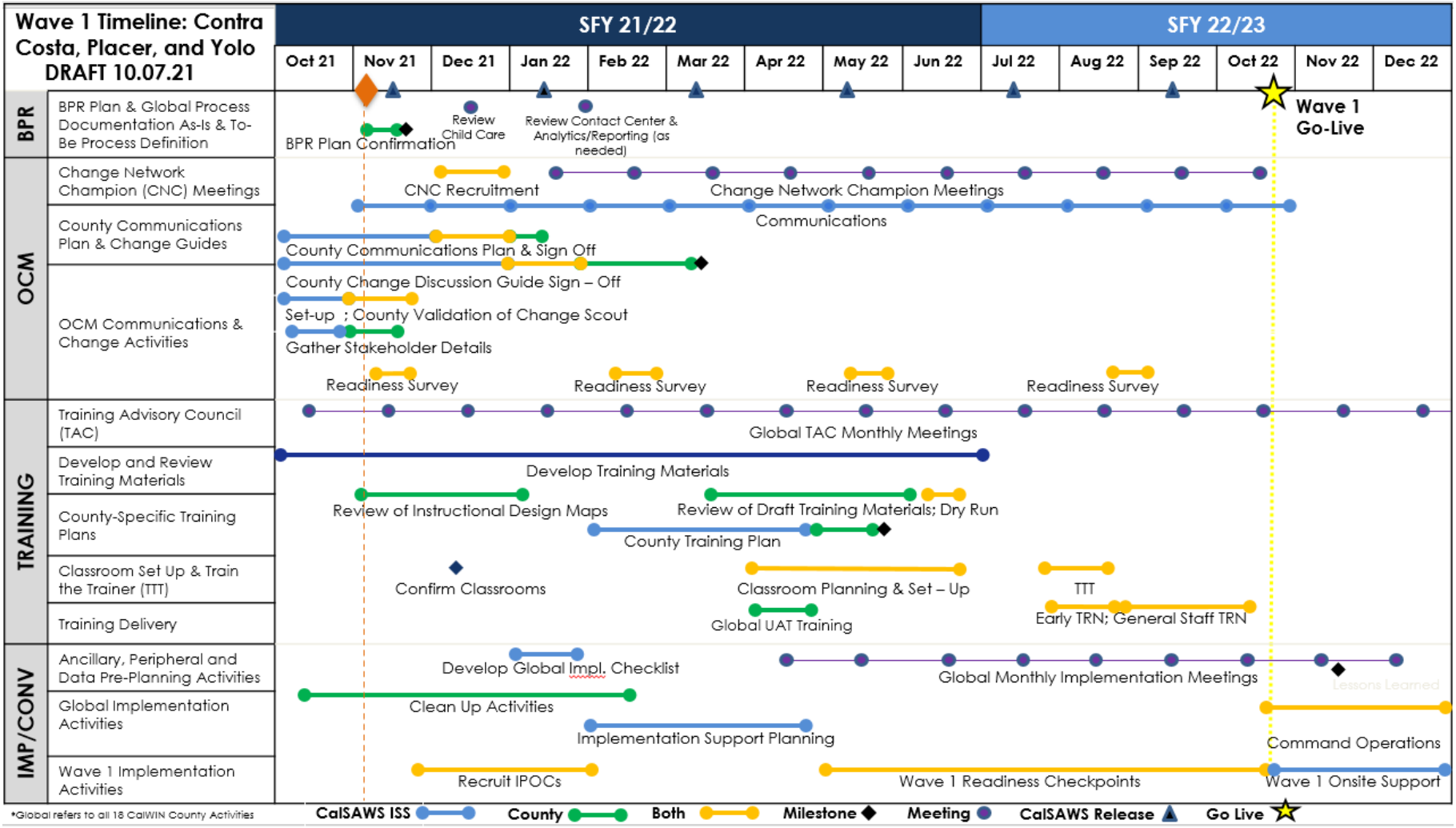
Phase	C-IV	CalWIN	Ancillary
Mapping and Development	Complete	On-Going *w/Epics* In-Progress *w/Data Model Updates and EDBC Match*	In-Progress *Counties delivering data for Testing*
Conversion System Testing	Complete	In Progress through March 2022 *CalWIN GDS#2 System Test Execution last 2 weeks of October 2021 (for CDT)*	
Converted Data Test (CDT) Support	Complete	Begins November 1, 2021	
EDBC Match	Complete	Planning and Execution Started in March 2021	n/a
Conversion Reports	Complete	Planning and Design Began March 2021	In-Progress (w/County Data Files) *First reports delivered October 17, 2021*
Mock Conversions	Complete	Wave 1 Mock Conversion Planned April 2022 (with County Validation in Final Mock for Wave)	
Cutover Schedule	Complete	Wave 1 Go-Live October2022	

C-IV is Live in CalSAWS!

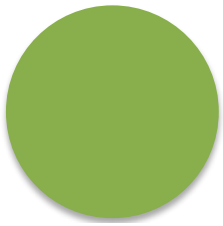
9. CalWIN Implementation Support Services Update

Wave 1 Timeline

Contra Costa, Placer, and Yolo



Business Process Reengineering (BPR)



BPR: To-Be Schedule Update

Based on experience through Waves 1-3, we are making a slight adjustment to the schedule for Waves 4-6:

1) There is no change to To-Be Session duration or Review duration. This is consistent for all counties Waves 2-6.

2) One week of transition time has been added between when one set of most Wave 4-6 counties' To-Be Sessions end and when the next set of To-Be Sessions start.

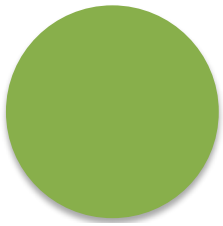
	Session Start Date	Session End Date	First Review Start Date	First Review End Date	Start Final Review	County Sign-Off on Final To-Be Work Product
Wave 1						
Contra Costa	06/21/21	07/30/21	08/04/21	09/02/21	09/02/21	09/10/21
Placer	06/21/21	07/30/21	08/04/21	08/20/21	08/30/21	09/07/21
Yolo	07/12/21	08/11/21	08/11/21	08/27/21	09/08/21	09/17/21
Wave 2						
Tulare	09/13/21	10/08/21	10/11/21	10/22/21	11/01/21	11/05/21
Santa Clara	09/13/21	10/08/21	10/11/21	10/22/21	11/01/21	11/05/21
Wave 3						
Santa Barbara	10/18/21	11/12/21	11/15/21	11/30/21	12/08/21	12/14/21
Orange	11/15/21	12/14/21	12/20/21	01/07/21	01/18/22	01/24/22
Ventura	11/15/21	12/14/21	12/20/21	01/07/21	01/18/22	01/24/22
Wave 4						
Solano	01/10/22	02/04/22	02/15/22	02/28/22	03/08/22	03/14/22
Santa Cruz	01/10/22	02/04/22	02/15/22	02/28/22	03/08/22	03/14/22
San Mateo	02/07/22	03/04/22	03/07/22	03/18/22	03/28/22	04/01/22
San Diego	02/14/22	03/11/22	03/14/22	03/25/22	04/04/22	04/08/22
Wave 5						
Alameda	03/21/22	04/15/22	04/18/22	04/29/22	05/09/22	05/13/22
Fresno	03/21/22	04/15/22	04/18/22	04/29/22	05/09/22	05/13/22
Sonoma	04/25/22	05/20/22	05/23/22	06/06/22	06/14/22	06/20/22
Wave 6						
San Francisco	04/25/22	05/20/22	05/23/22	06/06/22	06/14/22	06/20/22
Sacramento	05/31/22	06/27/22	06/28/22	07/15/22	07/25/22	07/29/22
San Luis Obispo	05/31/22	06/27/22	06/28/22	07/15/22	07/25/22	07/29/22

One Week of transition between Counties' To-Be Sessions

BPR: To-Be Status

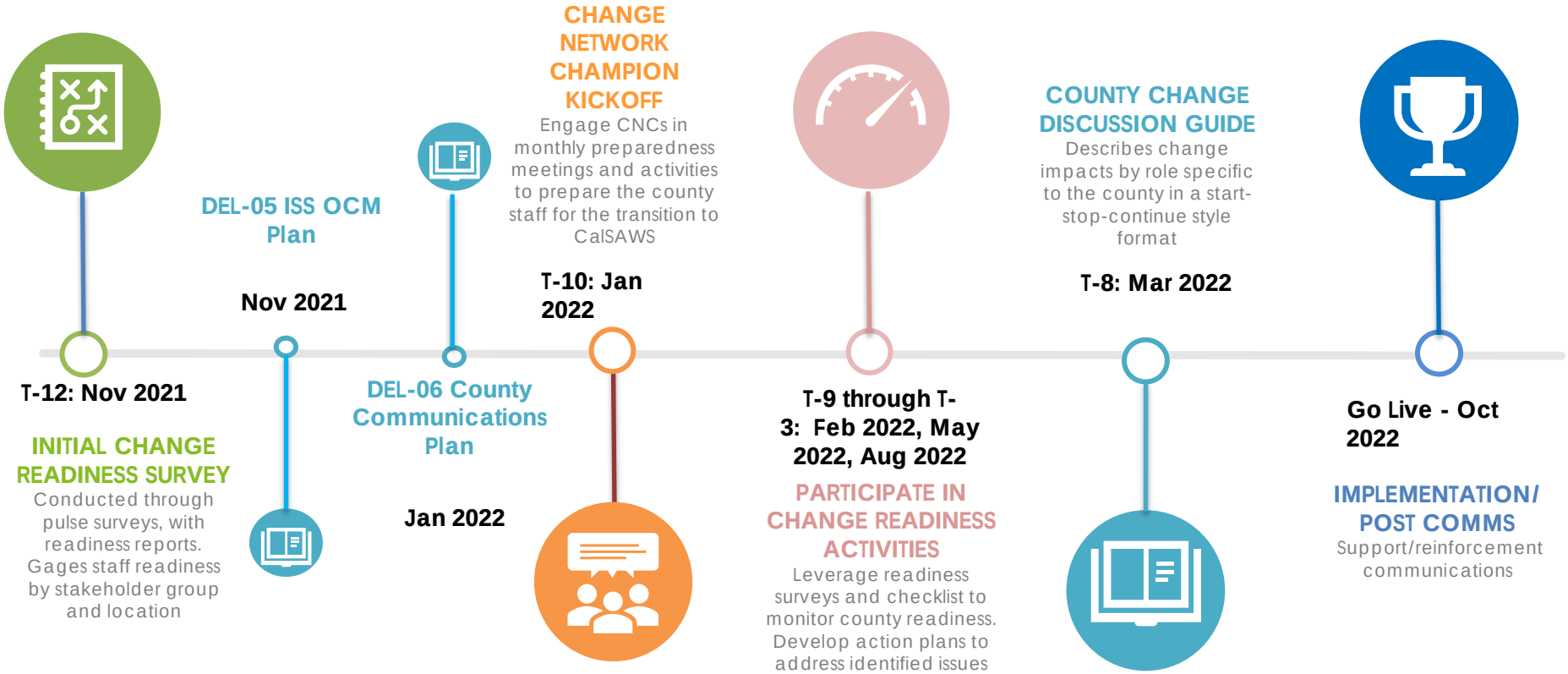
- Waves 1-2 – **ON-TRACK**
  - Wave-1 To-Be Final Work Product (FWP) and Closeout – **COMPLETE**
  - Wave-2 To-Be Sessions – **COMPLETE**
  - Wave-2 To-Be Draft Work Product (DWP) Submission – **COMPLETE**
  - Wave-2 To-Be Final Work Product (FWP) Sign-Off – **IN-PROGRESS**
- Wave 3 – **ON-TRACK**
  - Formal To-Be Prep Sessions for Santa Barbara – **COMPLETE**
  - To-Be Prep Sessions for Santa Barbara – **IN-PROGRESS**
  - Formal To-Be Prep Sessions for Orange and Ventura – **IN-PROGRESS**
- Waves 4-6 – **ON-TRACK**
  - Waves 4-6 To-Be preparation is in-progress

Organizational Change Management (OCM)



Organizational Change Management – Wave 1 Timeline

Contra Costa, Placer, and Yolo



Organizational Change Management

OCM POC Meeting – Previous & Upcoming Topics

October

- T-12 Review Change Readiness surveys questions for Wave 1 counties
- Review T-12 Upcoming Activities and County Expectations and Level of Effort
- County Communication Plan Preview

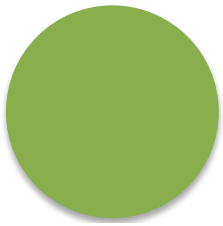
November

- Wave 1 Counties Participate in T-12 Readiness Survey
- Review Change Impacts with Wave 1 counties

December

- Waves 1 & 2 submit selections for Change Network Champions (CNCs) via CRFI response

Training



Training

Training Advisory Council (TAC) – Previous & Upcoming Topics

October

- Discussed the Approach to Multi-Program Training for CalSAWS
- Instructional Design Reviews were introduced and uploaded for the counties' reviews

November

- Learning Journey Map demonstration (a learning tool designed to enhance and reinforce learning)
- More Instructional Design Reviews will be introduced and provided to the counties for content review

Other Training Highlights:

✓ Working with the UAT Team to provide support to training.

✓ County TAC members to begin their review our instructional design documents.

✓ We've *listened* to what has been communicated by C-IV counties about their training experience & examining ways we can use their "lessons learned" to improve training for CalWIN counties.

Training

Training Approach for CalWIN Counties

Change Readiness

Change Discussions

Web-based Learning

Self-paced
Key concepts
New functionality

Classroom Experience

Role-specific
County-tailored
Skill Building, Proficiency

Practice Labs

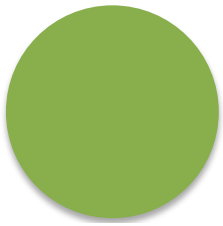
Week Before Go-live
Self-directed
Trainer Supported

Open Office Sessions

Post Go-live
Live, facilitated topics, Q&A

- Built on a solid foundation of functional WBTs
- Tailored for each County based on BPR/OCM business changes
- Layered with innovative learning tools and modern concepts
- Wave 1 Training (Train the Trainer, WBTs, Classroom Training, and Practice Labs) takes places July – October 2022

Implementation



Implementation Update

Incorporating all aspects of the project to prepare the CalWIN counties leading up to go-live – and providing support post go-live.

10. Central Print Update and Planning Activities

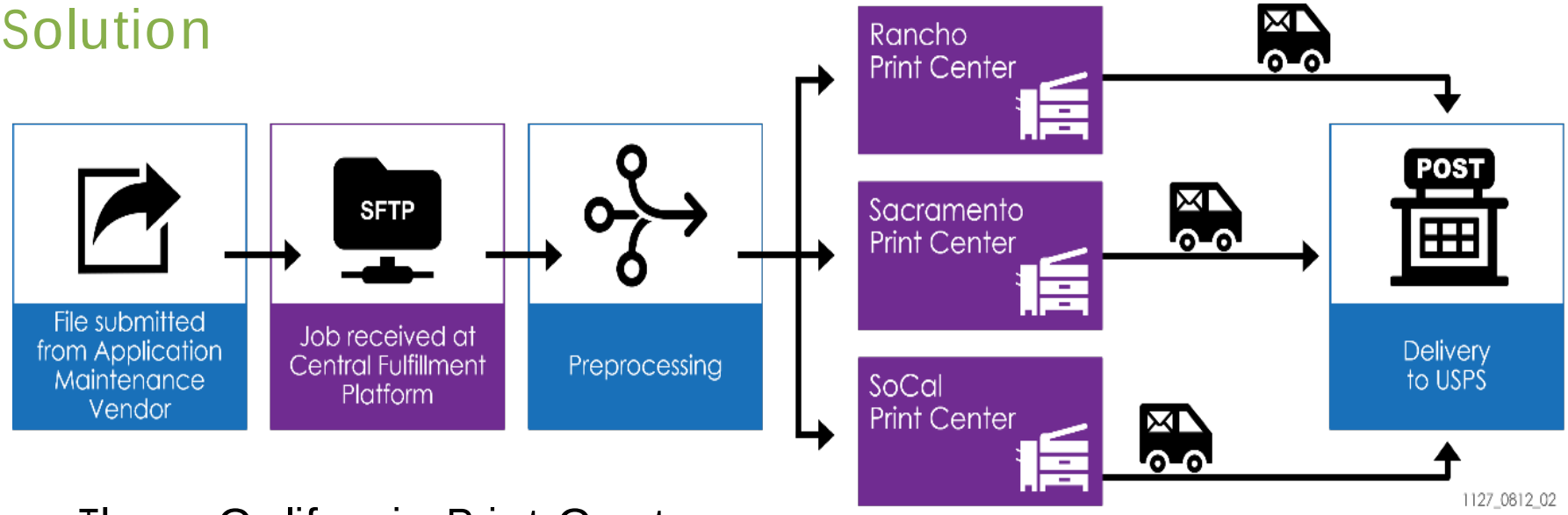
Central Print

Timing

- Transition 56 of the 58 Counties to Central Print Services
- Phase 1 (Los Angeles County) - Complete
- Remaining phases coordinate with CalSAWS implementation
  - Phase 2 (C-IV Counties) - Complete
  - Phase 3 (CalWIN Counties) - Six waves, beginning in October 2022
    - Contra Costa and Tulare Counties may optionally join
    - Opt in would need to be chosen by 12/30/21 to implement Central Print in their wave

Central Print

Solution



- Three California Print Centers
  - Rancho Print Center currently supports C-IV Counties
  - Sacramento Print Center currently supports CalWIN Counties
  - SoCal Print Center coming online in second quarter 2021
  - Each can handle overflow from the other
  - Each serves as the disaster recovery site for the others
- Preprocessing for:
  - Quality control
  - Presort
  - County specific requests

Central Print

Upcoming County Activities

	Wave 1	Wave 2
Kickoff Meeting	January 12, 2022	March 2022
Print and Postage POCs Identified	February 2022	March 2022
Configuration Meetings as applicable	February 2022	April 2022
Validation Meeting as applicable	March 2022	May 2022
Central Print Portal User Identification	August 2022	December 2022
Postage Deposit Completed	September 2022	January 2022
Central Print Portal Training	October 2022	February 2023

Central Print

Upcoming County Activities

	Wave 3	Wave 4
Kickoff Meeting	May 2022	July 2022
Print and Postage POCs Identified	May 2022	July 2022
Configuration Meetings as applicable	June 2022	August 2022
Validation Meeting as applicable	July 2022	September 2022
Central Print Portal User Identification	February 2023	April 2023
Postage Deposit Completed	March 2023	May 2023
Central Print Portal Training	April 2023	June 2023

Tentative dates may be adjusted based on the results of prior Waves.

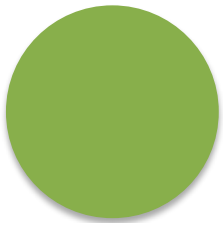
Central Print

Upcoming County Activities

	Wave 5	Wave 6
Kickoff Meeting	September 2022	November 2022
Print and Postage POCs Identified	September 2022	November 2022
Configuration Meetings as applicable	October 2022	December 2022
Validation Meeting as applicable	November 2022	January 2023
Central Print Portal User Identification	February 2023	August 2023
Postage Deposit Completed	March 2023	September 2023
Central Print Portal Training	August 2023	October 2023

Tentative dates may be adjusted based on the results of prior Waves.

11. ClearBest QA Update



ClearBest QA Update

How Does QA Fit into the CalWIN Migration Efforts?

Project Management

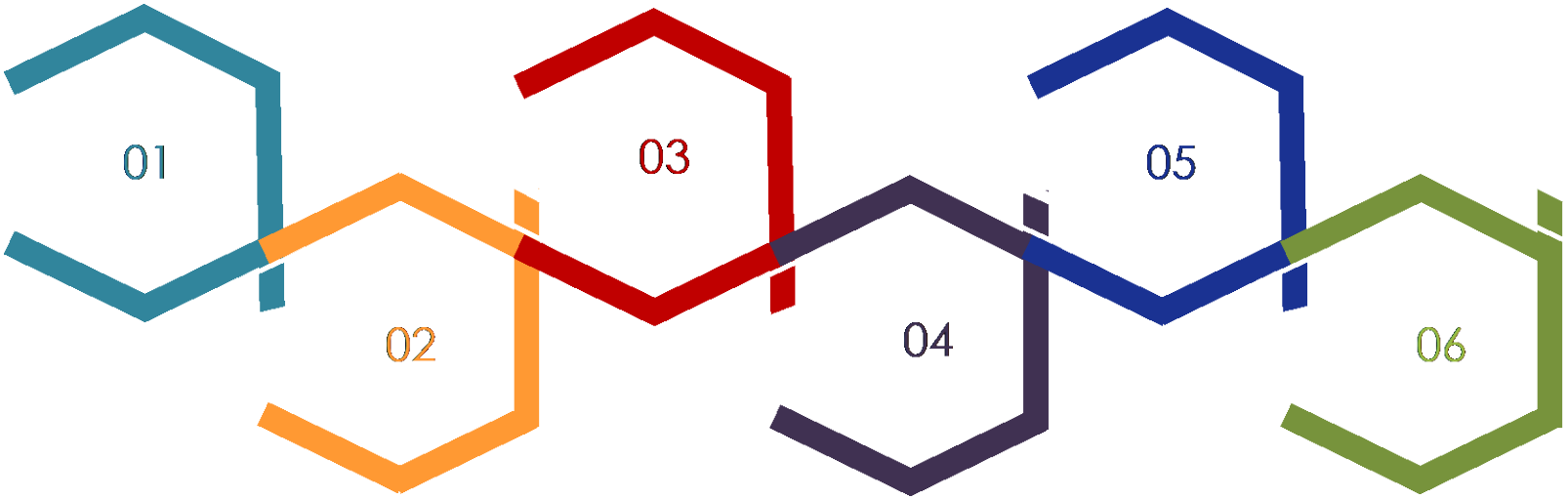
QA provides general project management support to the Consortium; risk and issue management; strategic advisement; county, state, and advocate communication support; facilitation training; CMS certification support; and IAPDU preparation support

Design/Build/ Conversion Reviews

QA reviews functional, tech, and conversion deliverables, work products, and SCRs with a lens toward meeting requirements, fit for use, gaps in designs, and potential OCM/training and communications with counties

Readiness Reviews

QA reviews, advises, and guides on Implementation, OCM, and Training deliverables and work products; reviews and supports county communications; tracks readiness activities; and participates with team members during preparation and post-go-live activities



SCR Analysis

QA participates in committees, analyzes SCRs, reviews estimates, identifies gaps in functionality between CalSAWS and CalWIN, and provides insight/guidance to Consortium

Testing

QA conducts Independent Testing on the highest priority/complex CalSAWS and BenefitsCal DD&I, M&O, and Premise Item SCRs; conducts Converted Data Testing; and manages CalSAWS UAT for CalWIN counties

M&O Performance

QA analyzes and tracks M&O system, batch, and imaging performance; seeks to improve deployment and ongoing processes; reviews security practices and updates; and reviews vendor-partner SLAs

ClearBest QA Update

How Are We Supporting CalWIN Migration?

We take the county perspective and focus on what the counties need to serve their customers

Counties must be part of the success of the system

We work with the teams to make sure:

- County needs are understood
- Counties have a clear understanding of what they need to do to get ready for go-live
- The questions that counties will ask are being asked and answered during planning
- County cultures are understood
- Communications are targeted for county perspective (understand county audience)
- Vendor partners are executing on their plans
- There are clear roles and responsibilities for every task, and all have been communicated
- Logistics are smooth
- Team is continually adjusting based on debriefs and lessons learned
- We are in the county offices to provide support during the post go-live period

ClearBest QA Update

How Are We Supporting CalWIN Migration?

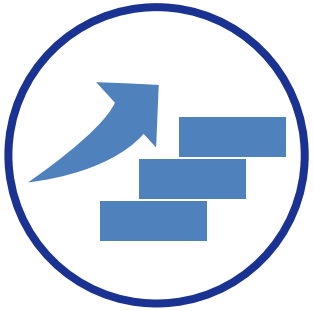
Bridge the Gaps
Work closely with Accenture and Deloitte teams to identify gaps in design, expectations, and needs. We help facilitate discussions, create county communications, etc.

Lessons Learned
Bring forward lessons learned from the C-IV Migration activities and continue to build upon them for each CalWIN wave

Communications
Actively plan, monitor, and adjust stakeholder engagement and communication strategies for both internal and external stakeholders

User Acceptance Testing
Work with and support the counties through the preparation and execution of CalSAWS UAT

County and Project Readiness
Advise and guide on planning and execution of the implementation strategy and activities. We evaluate the overall project readiness in advance of any implementation activities



Problem Mitigation and Escalation
We work with the counties and project to anticipate problems before they occur and escalate concerns, issues, and risks as early as possible

12. CalSAWS Financial Update

CalSAWS Quarterly Financial Update

Overview

- CalSAWS DD&I/M&O and Premise
- CalWIN M&O
- C-IV M&O
- LRS M&O
- JPA Admin

1. **Actuals to Date**
   Based on Vendor Invoices & County Claims
2. **Projections (Estimates to Complete)**
   Estimated Costs for Future Months
3. **Estimate at Completion (EAC)**
   Actual Costs Plus Estimated
4. **Total Allocation/Budget**
   Amount Allocated by Line Item for the Approved Budget
5. **Balance**
   Difference Between EAC and Budget
   Negative balance is over budget
   Positive balance is under budget
6. **% Expended to Date (Actuals)**
   Percent of Actuals to Date Divided by the Budget
7. **% EAC to Budget**
   Percent of EAC Divided by the Budget

Category	Actuals to Date[1]	Projections (ETC)	EAC	Total Allocation (Budget)	Balance + Under / (-Over)	% Expended to Date	% EAC to Budget
CalSAWS	**$67,928,992**	**$254,340,120**	**$322,269,112**	**$324,365,682**	**$2,096,570**	**20.9%**	**99.4%**
DD&I App. Dev.	$5,819,579	$16,162,099	$21,981,678	$21,981,678	$0	26.5%	100.0%
DD&I Non-App. Dev.	$39,202,427	$51,423,264	$90,625,691	$90,625,691	$0	43.3%	100.0%
DD&I Training	$660,065	$7,175,586	$7,835,651	$7,835,651	$0	8.4%	100.0%
DD&I GA/GR	$3,533,597	$784,063	$4,317,660	$4,317,660	$0	81.8%	100.0%
DD&I Procurement	$185,580	$13,016	$198,596	$198,596	$0	93.4%	100.0%
CalSAWS M&O	$13,528,033	$118,717,434	$132,245,467	$132,245,467	$0	10.2%	100.0%
M&O Procurement	$81,770	$929,287	$1,011,057	$1,011,057	$0	8.1%	100.0%
CalHEERS Interface	$663,764	$4,778,166	$5,441,930	$5,441,930	$0	12.2%	100.0%
Covered CA CSC	$19,071	$157,021	$176,092	$176,092	$0	10.8%	100.0%
CalSAWS Premise	$4,235,106	$54,200,184	$58,435,290	$60,531,860	$2,096,570	7.0%	96.5%
CalWIN M&O	**$33,146,864**	**$67,306,016**	**$100,452,880**	**$107,131,760**	**$6,678,880**	**30.9%**	**93.8%**
CalWIN M&O	$30,183,448	$61,766,935	$91,950,383	$91,950,383	$0	32.8%	100.0%
CalHEERS Interface	$2,343,821	$4,302,530	$6,646,351	$13,325,231	$6,678,880	17.6%	49.9%
CalHEERS CSCN	$619,595	$1,236,551	$1,856,146	$1,856,146	$0	33.4%	100.0%
C-IV M&O	**$24,854,714**	**$250,903**	**$25,105,617**	**$28,283,953**	**$3,178,336**	**87.9%**	**88.8%**
C-IV M&O	$22,124,072	$236,604	$22,360,676	$23,767,616	$1,406,940	93.1%	94.1%
CalHEERS Interface	$1,721,708	$14,297	$1,736,005	$3,478,921	$1,742,916	49.5%	49.9%
Covered CA CSC	$1,008,934	$2	$1,008,936	$1,037,416	$28,480	97.3%	97.3%
LRS M&O	**$15,753,387**	**$1,221,855**	**$16,975,242**	**$17,466,687**	**$491,445**	**90.2%**	**97.2%**
LRS M&O	$14,967,689	$1,130,592	$16,098,281	$16,141,717	$43,436	92.7%	99.7%
CalHEERS Interface	$785,698	$91,263	$876,961	$1,324,970	$448,009	59.3%	66.2%
JPA Admin. Budget	**$141,049**	**$580,211**	**$721,260**	**$721,260**	**$0**	**19.6%**	**100.0%**
CalSAWS 58 Counties	$141,049	$580,211	$721,260	$721,260	$0	19.6%	100.0%
Total	**$141,825,006**	**$323,699,105**	**$465,524,111**	**$477,969,342**	**$12,445,231**	**29.7%**	**97.4%**

Notes:

CalSAWS Premise: QA costs less than planned, and C-IV SAWS Shared App Premise is not applicable.

CalWIN, C-IV, and LRS CalHEERS: Application Maintenance for changes re: interface projected to be less than planned.

1. November Payment Month (partial actuals per advance)

CalSAWS | SFY 2021/22 CONSORTIUM PERSONNEL BUDGET & FTEs

CATEGORY	Actuals to Date	Projections (ETC)	EAC	Total Allocation (Budget)	BALANCE +Under / (-Over)	% Expended to Date	% EAC to Budget
CalSAWS DD&I	**$7,892,096**	**$21,432,423**	**$29,324,519**	**$29,324,519**	**$0**	**26.9%**	**100.0%**
Consortium Personnel - County[1]	$2,268,900	$10,555,449	$12,824,349	$12,824,349	$0	17.7%	100.0%
Consortium Personnel - Contractor[2,3]	$5,623,196	$10,876,974	$16,500,170	$16,500,170	$0	34.1%	100.0%
CalWIN M&O	**$1,323,874**	**$2,494,829**	**$3,818,703**	**$3,818,703**	**$0**	**34.7%**	**100.0%**
Consortium Personnel - County[1]	$29,678	$136,390	$166,068	$166,068	$0	17.9%	100.0%
Consortium Personnel - Contractor[2,3]	$1,294,196	$2,358,439	$3,652,635	$3,652,635	$0	35.4%	100.0%
C-IV M&O	**$1,428,449**	**$157,569**	**$1,586,018**	**$1,586,018**	**$0**	**90.1%**	**100.0%**
Consortium Personnel - County	$366,087	$157,567	$523,654	$523,654	$0	69.9%	100.0%
Consortium Personnel - Contractor[2]	$1,062,362	$2	$1,062,364	$1,062,364	$0	100.0%	100.0%
LRS M&O	**$3,229,015**	**$1,124,652**	**$4,353,667**	**$4,353,667**	**$0**	**74.2%**	**100.0%**
Consortium Personnel - County	$3,150,259	$1,124,652	$4,274,911	$4,274,911	$0	73.7%	100.0%
Consortium Personnel - Contractor[2]	$78,756	$0	$78,756	$78,756	$0	100.0%	100.0%
Premise	**$85,813**	**$598,900**	**$684,713**	**$839,985**	**$155,272**	**10.2%**	**81.5%**
Consortium Personnel - County	$22,618	$429,048	$451,666	$451,666	$0	5.0%	100.0%
Consortium Personnel - Contractor[2]	$63,195	$169,852	$233,047	$388,319	$155,272	16.3%	60.0%
Total	**$13,959,247**	**$25,808,373**	**$39,767,620**	**$39,922,892**	**$155,272**	**35.0%**	**99.6%**

CalSAWS | SFY 2021/22 CONSORTIUM PERSONNEL BUDGET & FTEs

SFY 2021/22 - Consortium Personnel FTE Counts	Current/Planned FTEs (Through 9/2021)	Current/Planned FTEs (As of 10/2021)
CalSAWS DD&I and M&O	**118**	**192**
Consortium Personnel - County[1]	38	85
Consortium Personnel - Contractor[2]	56	74
Consortium Personnel - Contractor Limited Term[3]	21	19
TBD[4]	3	14
CalWIN M&O	**21**	**21**
Consortium Personnel - County[1]	1	1
Consortium Personnel - Contractor[2]	12	12
Consortium Personnel - Contractor Limited Term[3]	7	7
TBD[4]	1	1
C-IV M&O	**25**	**0**
Consortium Personnel - County[1]	13	0
Consortium Personnel - Contractor[2]	9	0
Consortium Personnel - Contractor Limited Term[3]	3	0
TBD[4]	0	0
LRS M&O	**68**	**0**
Consortium Personnel - County[1]	64	0
Consortium Personnel - Contractor[2]	1	0
Consortium Personnel - Contractor Limited Term[3]	0	0
TBD[4]	3	0
Premise	**2**	**2**
Consortium Personnel - County[1]	1	1
Consortium Personnel - Contractor[2]	1	1
Total	**234**	**215**

[1]Includes only Consortium Staff, does not include County Support Staff
[2]Includes RGS and CSAC employees
[3]Includes RGS, CSAC, and First Data Staff (Non-Employees)
[4]Does not account for backfill considerations

CalSAWS | SFY 2021/22 CHANGE BUDGET (APPLICATION MAINTENANCE / M&E HOURS)

Change Budget Category	Actuals to Date	Projections (ETC)	EAC	Total Allocation (Budget)	BALANCE +Under / (-Over)	% Expended to Date	% EAC to Budget
CalWIN M&O	**$6,363,755**	**$28,040,042**	**$34,403,797**	**$41,082,677**	**$6,678,880**	**15.5%**	**83.7%**
CalWIN M&O	$5,430,057	$8,246,370	$13,676,427	$13,676,427	$0	39.7%	100.0%
CalHEERS Interface Change Budget	$282,258	$1,321,648	$1,603,906	$8,282,786	$6,678,880	3.4%	19.4%
CalHEERS CSCN Change Budget	$20,800	$228,795	$249,595	$249,595	$0	8.3%	100.0%
CalWIN Premise	$630,640	$18,243,229	$18,873,869	$18,873,869	$0	3.3%	100.0%
C-IV M&O	**$6,286,369**	**$1,342,925**	**$7,629,294**	**$10,834,734**	**$3,205,440**	**58.0%**	**70.4%**
C-IV M&O	$5,728,000	$0	$5,728,000	$5,728,000	$0	100.0%	100.0%
CalHEERS Interface Change Budget	$191,238	$0	$191,238	$1,789,280	$1,598,042	10.7%	10.7%
Covered CA CSC Change Budget	$233,856	$0	$233,856	$233,856	$0	100.0%	100.0%
C-IV Premise	$133,275	$1,342,925	$1,476,200	$3,083,598	$1,607,398	4.3%	47.9%
LRS M&O	**$5,641,725**	**$0**	**$5,641,725**	**$6,089,818**	**$448,093**	**92.6%**	**92.6%**
LRS M&E	$5,203,244	$0	$5,203,244	$5,203,328	$84	100.0%	100.0%
CalHEERS Interface Change Budget	$438,481	$0	$438,481	$886,490	$448,009	49.5%	49.5%
CalSAWS M&O	**$3,753,708**	**$24,460,228**	**$28,213,936**	**$28,213,936**	**$0**	**13.3%**	**100.0%**
CalSAWS M&E	$2,385,921	$16,701,442	$19,087,363	$19,087,363	$0	12.5%	100.0%
CalHEERS Interface Change Budget	$531,946	$3,723,622	$4,255,568	$4,255,568	$0	12.5%	100.0%
BenefitsCal	$0	$811,938	$811,938	$811,938	$0	0.0%	100.0%
LRS/Calsaws Premise	$835,841	$3,223,226	$4,059,067	$4,059,067	$0	20.6%	100.0%
TOTAL	**$18,291,849**	**$29,382,967**	**$47,674,816**	**$58,007,229**	**$10,332,413**	**31.5%**	**82.2%**

CalSAWS | SFY 2021/22 CONTRACT OBLIGATIONS

Warranty & Liquidated Damages Detail - SFY 2021/22					
Category	**Contract**	**Service Month**	**Amount**	**Invoice Month**	**Invoice #**
Deliverable(s) to UAT on schedule	CalWIN	June-20	$5,000	July-21	60006752
Operations Deliverables and Reports Delivery	CalWIN	June-20	$263	July-21	60006752
CalWIN System Availability	CalWIN	May-21	$30,250	August-21	60007348
C-IV Application Maintenance	C-IV	April-21	$14,320	July-21	1100759393
C-IV Application Maintenance	C-IV	May-21	$4,475	August-21	1100766972
LRS Daily Prime Business Hours Availability	LRS	April-21	$5,000	July-21	1100759977
Total			**$59,308**		

Hours & Credits					
Category	**Actuals**	**Projections (ETC)**	**EAC**	**Allowance**	**BALANCE +Under / (-Over)**
CalWIN Modernization ("Modification") Hours	$4,715,006	$1,208,598	$5,923,604	$8,217,460	$2,293,856
CalWIN Business Intelligence (BI)	$3,971,215	$0	$3,971,215	$3,971,215	$0
CalWIN IDMS	$1,326,780	$173,220	$1,500,000	$1,500,000	$0
CalWIN Business Rules Engine (BRE)	$0	$3,500,000	$3,500,000	$3,500,000	$0
C-IV Royalty Fees	$200,000	$0	$200,000	$200,000	$0
Total	**$10,213,000**	**$4,881,818**	**$15,094,818**	**$17,388,675**	**$2,293,856**

Notes:

Modernization Hours are updated each August with 8,500 hours; includes hours from prior years (updated 8/6/20).

IDMS $1.5M to be applied to CalSAWS GA/GR.

BRE $3.5M to be applied to CalSAWS GA/GR.

Royalty fees are per Accenture Licensing Agreement for C-IV, includes $200k for SFY 21/22.

C-IV Contract (Premise/Maintenance and Operations Services)	Total Amount	Allocation Letter Ref.
Total Baseline Allocation (Amendment 115)	**$12,000,000**	
Previously Approved through June 2021	$651,964	ONE
Pandemic Emergency Assistance Fund	$104,400	TWO
Total Allocated Amounts	**$756,364**	
Total Remaining Allocation	**$11,243,636**	

C-IV Contract (County Purchases)	Total Amount	Allocation Letter Ref.
Total Baseline Allocation (Amendment 115)	**$23,000,000**	
Previously Approved through June 2021	$6,566,404	ONE
County Purchases through September 2021	$15,409,017	TWO
Total Allocated Amounts	**$21,975,421**	
Total Remaining Allocation	**$1,024,579**	

LRS Contract (Premise/App Maintenance Services)	Total Amount	Change Notice Ref.
Total Baseline Allocation (Amendment 23)	**$50,000,000**	
Previously Approved through June 2021	$21,229,544	ONE - NINE
CalHEERS Maintenance	$412,772	TEN
Get CalFresh (Code for America)	$1,238,837	TEN
Pre-populated Medi-Cal Redetermination Forms	$1,800,900	TEN
Age 50 or Older Full Scope Med-Cal Exp	$536,268	TEN
LRS M&E	$1,331,242	TEN
Stage One Continuous Eligibility (Fiscal Year Shift for CN5)	$0	ELEVEN
CalWORKs Time Clock	$1,204,950	ELEVEN
CalWORKs Child Support Pass-Through	$165,822	ELEVEN
Elderly Simplification Application	$499,902	ELEVEN
Pandemic Emergency Assistance Fund	$174,000	ELEVEN
CalFresh Public Assistance Definition Alignment	$574,896	ELEVEN
ForgeRock IAM Enterprise Enablement M&O (Extension of CN7)	$1,243,200	ELEVEN
Total Allocated Amounts	**$30,412,333**	
Total Remaining Allocation	**$19,587,667**	

LRS Contract (County Purchases)	Total Amount	Change Notice Ref.
Total Baseline Allocation (Amendment 23)	**$20,000,000**	
N/A	$0	
Total Allocated Amounts	**$0**	
Total Remaining Allocation	**$20,000,000**	

Deloitte Portal/Mobile	Total Amount	Work Order Ref.
Total Baseline Allocation (Change Order 3)	**$5,000,000**	
Customer Compensation Payments	$7,728	ONE
Pre-populated Medi-Cal Redetermination Forms	$682,583	TWO
Get CalFresh (Code for America)	$422,067	THREE
Total Allocated Amounts	**$1,112,377**	
Total Remaining Allocation	**$3,887,623**	

Deloitte CalWIN ISS (County Purchases)	Total Amount	Work Order Ref.
Total Baseline Allocation (Amendment 2)	**$8,000,000**	
Total Remaining Allocation	**$8,000,000**	

CalWIN Contract (Premise/App Maintenance Services)	Total Amount	Change Order Ref.
Total Baseline Allocation	**$54,516,908**	
Previously Approved Projects	$18,419,400	N/A
Pre-populated Medi-Cal Redetermination Forms	$575,000	TWO
CalWORKs Time Clock	$1,413,261	THREE
Pandemic Emergency Assistance Fund	$434,588	THREE
Total Allocated Amounts	**$20,842,249**	
Total Remaining Allocation	**$33,674,659**	

CalWIN Contract (County Purchases)	Total Amount	Change Notice Ref.
Total Baseline Allocation	**$6,968,662**	
Previously Approved	$2,021,592	N/A
Total Allocated Amounts	**$2,021,592**	
Total Remaining Allocation	**$4,947,070**	

First Data LRS Contract (Staff Augmentation Services)	Total Amount	Change Notice Ref.
Total Baseline Allocation (Amendment 7)	**$1,000,000**	
Previously Approved through June 2021	$337,792	ONE - TWO
Testing Staff Augmentation	$40,832	THREE
Testing Staff Augmentation	$116,928	FOUR
Total Allocated Amounts	**$495,552**	
Total Remaining Allocation	**$504,448**	

Infosys Contract (App Maintenance Services)	Total Amount	Change Notice Ref.
Total Baseline Allocation	**$10,000,000**	
Previously Approved	$7,002,152	
Total Allocated Amounts	**$7,002,152**	
Total Remaining Allocation	**$2,997,848**	

ClearBest	Total Amount	Work Order Ref.
Total Baseline Allocation (Change Order 6)	**$4,000,000**	
Central Print	$91,120	ONE
Get CalFresh (Code for America)	$89,110	TWO
Pre-populated Medi-Cal Redetermination Forms	$248,349	THREE
Age 50 or Older Full Scope Med-Cal Exp	$65,493	FOUR
CalWORKs Time Clock	$181,374	FIVE
Elderly Simplification Application	$49,932	SIX
OCAT QA Services through June 2022	$50,040	SEVEN
Total Allocated Amounts	**$775,418**	
Total Remaining Allocation	**$3,224,582**	

13. Policy Update

Policy Updates

CalFresh Emergency Allotments (Max Allotments)

- Covering benefit months – July, August, September

County	Actual Amount Paid Jun and case count		Actual Amount Paid Jul and case count		Actual Amount Paid Aug and case count		Totals for all 3 months Issued Amts	Case Count
ALA	$37,128.00	216	$374,231.00	1,593	$14,329,202.00	85,227	*$14,740,561.00*	*87,036*
CCS	$64,825.00	379	$295,370.00	1,266	$7,910,567.00	46,236	*$8,270,762.00*	*47,881*
FRS	$10,660.00	48	$276,238.00	822	$17,856,536.00	96,871	*$18,143,434.00*	*97,741*
ORG	$23,099.00	111	$506,212.00	1,660	$24,916,418.00	143,929	*$25,445,729.00*	*145,700*
PLA	$3,981.00	14	$40,911.00	125	$1,853,733.00	10,496	*$1,898,625.00*	*10,635*
SAC	$18,239.00	87	$494,181.00	1,580	$19,966,281.00	117,663	*$20,478,701.00*	*119,330*
SBR	$7,863.00	26	$115,912.00	404	$4,387,771.00	25,767	*$4,511,546.00*	*26,197*
SCL	$17,439.00	84	$320,646.00	1,170	$10,902,309.00	66,042	*$11,240,394.00*	*67,296*
SCZ	$3,650.00	22	$35,553.00	158	$2,668,964.00	16,308	*$2,708,167.00*	*16,488*
SDG	$25,792.00	123	$606,231.00	2,062	$35,344,019.00	203,238	*$35,976,042.00*	*205,423*
SFO	$15,001.00	64	$132,002.00	556	$10,650,785.00	65,670	*$10,797,788.00*	*66,290*
SLO	$2,917.00	13	$49,066.00	158	$1,932,112.00	11,572	*$1,984,095.00*	*11,743*
SMT	$4,108.00	17	$55,648.00	186	$2,959,617.00	17,139	*$3,019,373.00*	*17,342*
SOL	$4,260.00	28	$79,478.00	277	$4,410,208.00	25,957	*$4,493,946.00*	*26,262*
SON	$82,295.00	312	$150,082.00	737	$3,138,732.00	18,917	*$3,371,109.00*	*19,966*
TUL	$22,980.00	105	$196,461.00	617	$9,106,381.00	49,663	*$9,325,822.00*	*50,385*
VEN	$10,604.00	41	$148,189.00	445	$6,511,524.00	37,353	*$6,670,317.00*	*37,839*
YOL	$6,301.00	28	$87,334.00	375	$2,077,235.00	13,365	*$2,170,870.00*	*13,768*
Totals	**$361,142.00**	**1,718**	**$3,963,745.00**	**14,191**	**$180,922,394.00**	**1,051,413**	**$185,247,281.00**	**1,067,322**

- **<u>Threshold Note for November</u>**
- November issuance will be larger as it will include October benefit month due to the COLA a nearly 25% increase overall.

Policy Updates

CalFresh Automated Mass Replacements (AMR)

- FNS approved CDSS' AMR request.
- FNS approved replacement at 50% for benefits issued 10/1-10/2021 related to power outages October 11 and 12.
- 14 Counties: Amador, Colusa, **Fresno**, Glenn, Kern, Lake, Mariposa, Monterey Napa, **San Luis Obispo**, **Santa Cruz**, Tehama, Tuolumne, and **Yolo**.
- CalWIN to issue on 10/31.
- CalSAWS to issue on 11/4.

Future

- This latest round of AMR does not include the redemption, but meetings will be scheduled to work with FIS, OSI, CDSS and SAWS to come up with a short-term and long-term solution.
- CDSS is working with FNS' to understand their expectation to issue a % of the redeemed benefits only and not the full allotment the household received.

Release 67 (November 15, 2021)

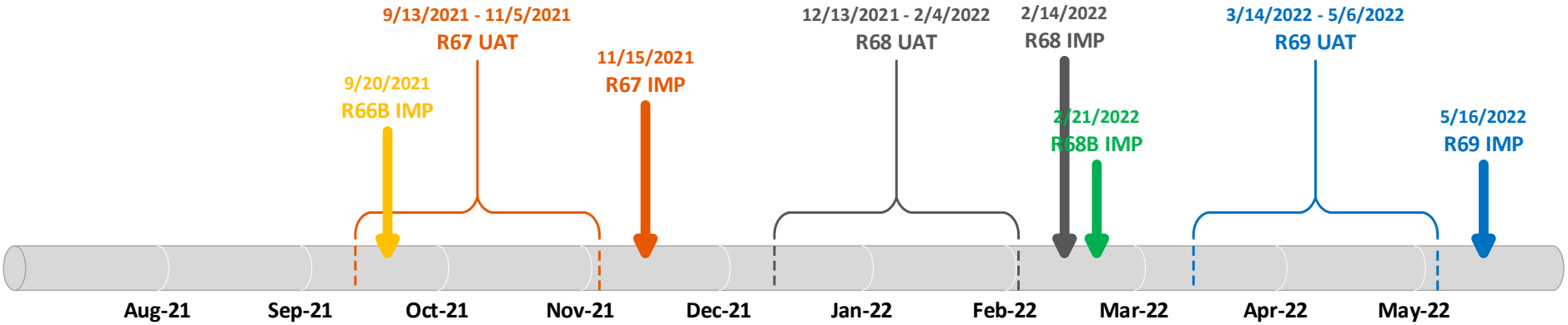
High Level Highlights

- CalWORKs
  - CalWORKs Child Support Disregard Increases (PPM#58208)
  - EBT Issuance for Homeless Assistance (PPM#58209)
- Medi-Cal
  - Redesigned MAGI/Non-MAGI Medi-Cal Annual Renewal Forms to be automated in MyBenefits CalWIN (PPM#58225)
- GA/GR-Correspondence
  - CW5-New automated variables (PPM#58030)
  - SSP14-New automated variables (PPM#58085)
  - GA/GR Appointment Letter – Consortia Form (PPM#58110)

Policy Updates

Rev: 9/16/2021

CalWIN Release Delivery Impact



R66B –9/20/21, *(Effort Hours – 2,212)*

58708 SSN Marked "Not Received", However CalHEERS Showing "SAWS Verified"
58668 Test Only (TOD) for CalHEERS R21.9 CalWIN R66B
58902 New Payment Type Code for NSTB

R67 –11/15/2021 *(28,199 Effort Hours)*

56207 MOD00 Migrate Notice CalWIN to AWS
58030 CW 5 – New automated variables
58084 MOD00 e-Verification for Non-MAGI Eligibility Determinations (ACWDL 20-17)
58085 SSP 14 – New automated variables
58110 GA/GR Appointment Letter - Consortia Form
58131 Exemption of Census Income for Non-MAGI Medi-Cal
58208 CW Child Support Disregard Increases
58209 EBT Issuance for Homeless Assistance
58225 Redesigned MAGI/Non-MAGI Medi-Cal Annual Renewal Forms to be automated in MyBenefits CalWIN
58769 CF 358S/F Report ACL Changes
59027 New Auto variable for CF 29A (2/14) CalFresh Initial Appointment Letter
59137 Add New Batch AU "MC Batch Expt-Awaiting Review" option to include/exclude for COLA/ Mass Update for CH 164544
59660 Update OSB CalHEERs Poller Availability Safety Net
57923 CD SBR Update CalWIN With External Data
58729 CD ALA Automate MC RRR to Both Client and AR

R68 –2/14/2022 *(19,346 Effort Hours)*

55738 CW Clarification of Mandatory Incl Regs for AU Composition
58070 MOD00 Enh of Individual Level Eligibility Determinations
58210 CalFresh ESAP SAR 7 Elimination
58889 Treatment of CalWORKs/RCA Cases on Incom ICTs
59147 Pre-popul MAGI/Non-MAGI Medi-Cal Ann Ren Form Redesign – PII
59233 Upd MyBenefits CalWIN to collect the Sexual Orient Gender Identity (SOGI) info addr in AB 959
59249 BREFS EHIT Verify Enh- Add Value Column
59358 Aid Code 3F Update
59550 Cov CA Aid Codes (X1–X9) Not Consd as MC w/o Share of Cost
59594 Enh of Prop Budget under the Spousal Impoverishment Prov
60336 CF296 Report Modifications
60339 CMS PI - Identified Changes that align to respond the SIRFRA # 1107

R68B –2/21/2022 *(19,835 Efforts)*

59046 Test Only (TOD) for CalHEERS R22.2 CalWIN R67B
59250 Citizenship Verif Mark "Not Received", However CalHEERS Showing "SAWS Verified"
59524 CalHEERS (R22.2 Tech Refr) - Repl Partner Access Gateway with Red Hat
59549 Case Linkage per CalHEERS Update (CH 171387)
59551 Verify Current Inc Svc for FDSH e-verif of income (Work Number)
59553 BREfS CalHEERS App Life Cycle (CH 171373)
59578 Impl Addl Language Pref per MEDS Update (CH 168267)
59693 MAGI ARPA Postpartum Extension (CH 182474)
59694 American Rescue Plan Act (ARPA) Postpartum Care for Non-MAGI MC
59743 Verification Caching Phase II (CH 172212)
60032 MAGI Health4All Companion to CalHEERS CR 159158
60033 Health4All - Older Californian Expansion for Non MAGI

R69 –2/14/2022 *(13,534 Effort Hours)*

58079 CalWORKs Time Limit Changed to 60 Months
58211 Repeal of the WTW 24-Month Time Clock58211 Repeal of the WTW 24-Month Time Clock
58240 Full Implementation of Level of Care Rate Determination Protocol (LOCP)
59790 IEVS asset verification request at application
59847 Automation of housing supplement across counties for Foster Care THP-NMDs program
60173 MOD05 CalSAWS Conversion (Retention Documents and CC Replication)

*Forecasted total Effort Hours will increase as estimates are finalized and if additional content is added to the releases.

14. Operations Update

14.1 County POP & MR Server Decommission

14.2 CalWIN (HP Superdome)Server Upgrade

- Updates: MR/POP Servers Decom and Superdome Upgrade

- Presented By: Henry Arcangel

14.1 County POP & MR Server Decommission

Counties MR and POP Servers De-commissioned and Servers picked up:

Contra Costa -10/6
Fresno – 10/7
Orange – 10/7
Placer – 10/6
Sacramento – 10/7
San Diego – 10/6
San Luis Obispo – 10/5
Alameda – 10/11
San Francisco – 10/15
Santa Clara –10/12
San Diego – 10/6
Santa Barbara – 10/6
Solano – 9/23
Sonoma – 9/20
Tulare – 10/7
Ventura 10/6
Yolo – 10/7
San Mateo – 10/18
Santa Cruz – 10/12

Steps* to decom POP and MR servers at the counties:

Creation of Wipe CDs:

- CalWIN Ops Desktop Support created the CD image and burn 36 copies.
- The CDs utilized the utility DBAN.
- CalWIN Ops Desktop Support packaged CDs and sent to the counties.

Execution of the Wipe Process:

- County technical contacts received the CDs, then inserted them into the servers and sent an email to: maria.goodwin@dxc.com to inform GW team that the servers are ready to wipe.
- This email triggered the OPS team to remotely initiate the wipe of the drives.
- When wipe was finished, Wintel team took a screenshot of the status window indicating that the wipe is complete.

Recovery of the Server HW

- Instead of asking Counties to ship the hardware back to us, we sent staff out to the counties to retrieve the hardware in person.
- Gainwell sent Remote Field Techs out to each site to get the servers.
- After retrieval, the servers were taken directly to the Service Depot for disposal.

* A CIT was sent out 7/15/21 to the counties with these steps

14.2 CalWIN (HP Superdome) Server

The Core CalWIN applications runs on HP Superdome server. Gainwell has implemented changes on Superdome to improve performance of CalWIN systems.

PPM Project:

55815

Implemented:

8/29/2021

Purpose:

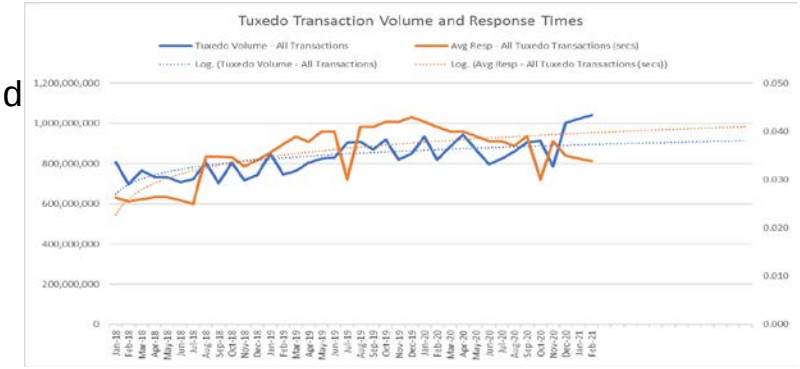
- Improve performance of CalWIN online and CIS databases

Business Benefits:

- Enhanced user experience with CalWIN and CIS delivery
- Improved application performance
- Increased reliability and stability

Technical Details:

- ✦ Added additional CPUs to CIS and Tuxed
  - ✓ Improve CPU utilization
  - ✓ Minimize performance lag
  - ✓ Improve service reliability
  - ✓ Increase environment stability



Thank you

15. WCDS Subcommittee Meeting Schedule for 2022

2022 WCDS Subcommittee Meeting Schedule

Month	WCDS Subcommittee	CWDA	CalSAWS JPA Board	PSC
January 2022	January 14, 2022	January 14, 2022	January 27, 2022	January 27, 2022
February 2022	No Meeting	February 18, 2022	February 18, 2022	February 17, 2022
March 2022	March 18, 2022	March 11, 2022	March 11, 2022	March 17, 2022
April 2022	No Meeting	April 15, 2022	April 15, 2022	April 21, 2022
May 2022	May 20, 2022	May 13, 2022	May 13, 2022	May 19, 2022
June 2022	No Meeting	June 10, 2022	Conference, June 23, 2022	Conference, June 23, 2022
July 2022	July 8, 2022	No meeting	July 22, 2022	July 21, 2022
August 2022	No Meeting	August 12, 2022	August 12, 2022	August 18, 2022
September 2022	September 16, 2022	September 9, 2022	September 9, 2022	September 15, 2022
October 2022	No Meeting	Conference, October 12-14, 2022	No Meeting	No Meeting
November 2022	November 4, 2022	November 18, 2022	November 18, 2022	November 17, 2022
December 2022	No Meeting	Directors Workshop, December 1-2, 2022	December 16, 2022	December 15, 2022

16. Adjourn Meeting

- Next meeting January 14, 2022