### CalSAWS | JPA Board of Directors Meeting



### Agenda

- Call Meeting to Order
- 2. Confirmation of Quorum and Agenda Review
- 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**

### **Action Items**

- 4. Authorization to conduct CalSAWS JPA Board, Project Steering Committee (PSC), and WCDS Subcommittee Meetings in accordance with subdivision (e) of Government Code Section 54953 through January 7, 2022, based on the following findings:
  - a) The Governor's State of Emergency related to COVID-19 remains in effect; and
  - b) Sacramento County continues to recommend measures to promote social distancing.
- 5. Pursuant to the JPA Agreement, Article III, Section 3.01, the Board of Directors shall elect from among its Directors, a Vice-Chair.
  - a. Seek nominations and creation of a slate for Board of Directors Vice-Chair for the period of December 17, 2021 – June 30, 2022.
  - b. Proceed to elect the Vice-Chair for the period of December 17, 2021 June 30, 2022.

### **Action Items**

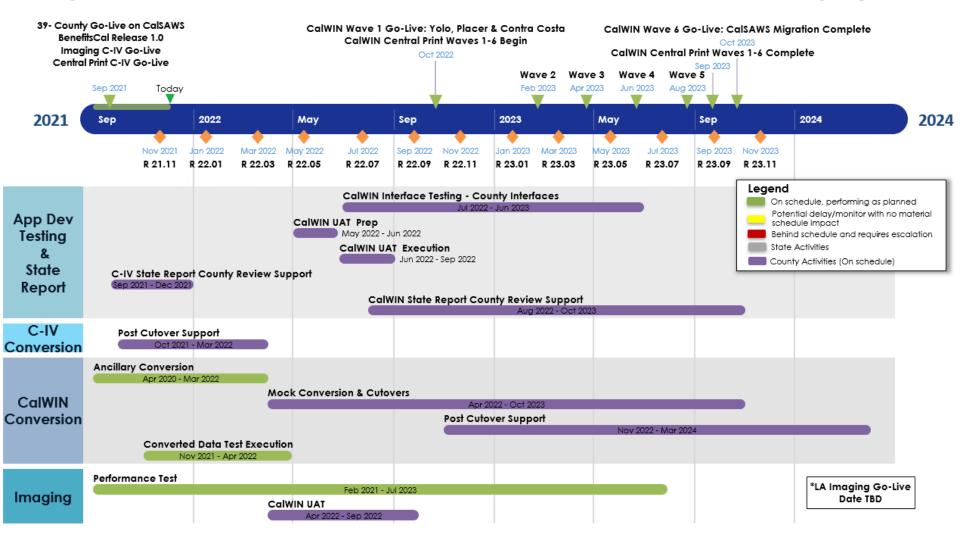
### 6. Approval of Consent Items

- a. Approval of the Minutes and review of the Action Items from the November 17, 2021, JPA Board of Directors Meeting.
- Approval of RGS Amendment 34, which includes annual update to cost of benefits, reconciliation of FTE counts, and clarification of sick leave and step increases
- c. Approval of CalSAWS Change Notice No. 13, which includes CDSS Reports Support, enhancements for CalSAWS Correspondence, additional M&E hours, and shifts to Customer Service Center Project and Non-State Forms milestones.
- d. Approval for ClearBest Work Order 9, which includes requests for Additional Professional Services and Project Management hours.
- e. Approval of Gainwell CalWIN M&O Change Request 4, which includes Elderly Simplified Application Project (ESAP), CalWORKs Outcoming and Accountability Review (Cal-OAR), and County Directs.
- f. Approval of Gainwell Central Print Option to include Contra Costa County Central Print Services.

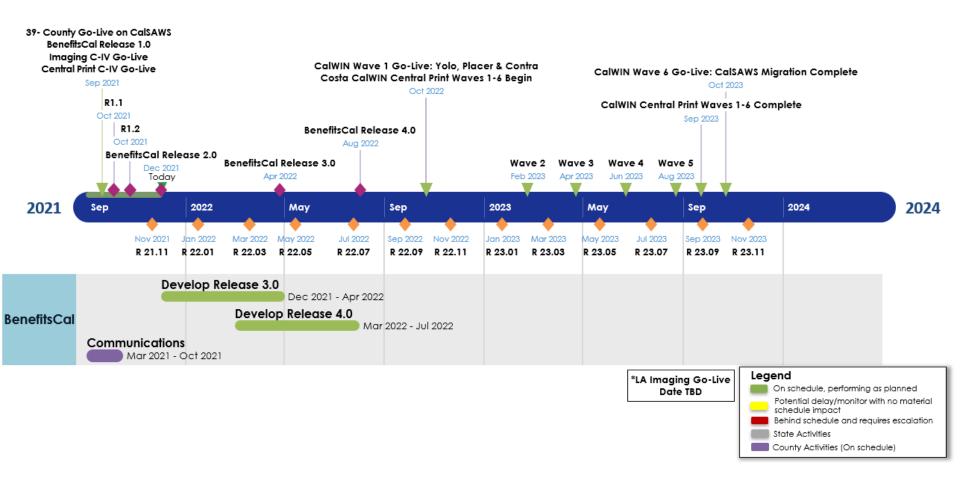
### Informational Items

### CalSAWS Gantt Chart Review

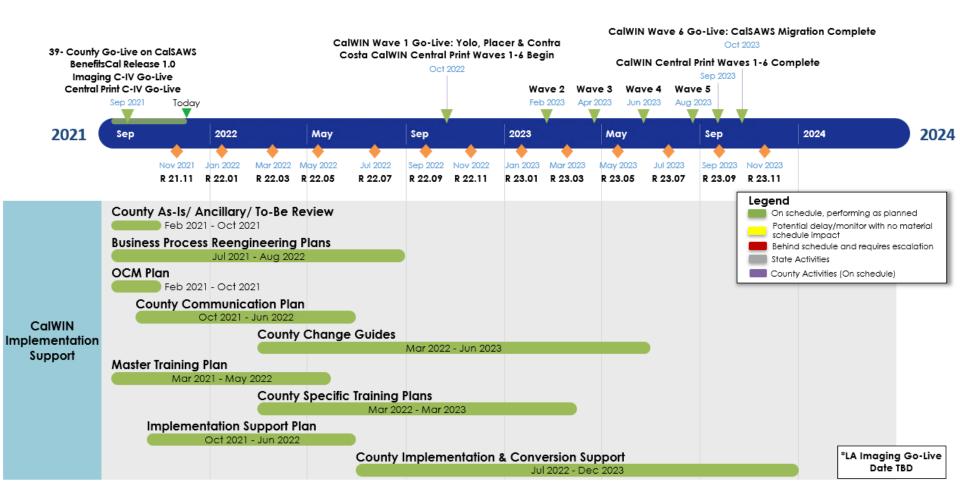
### High Level Overview - App Dev & Test, Conversion, and Imaging



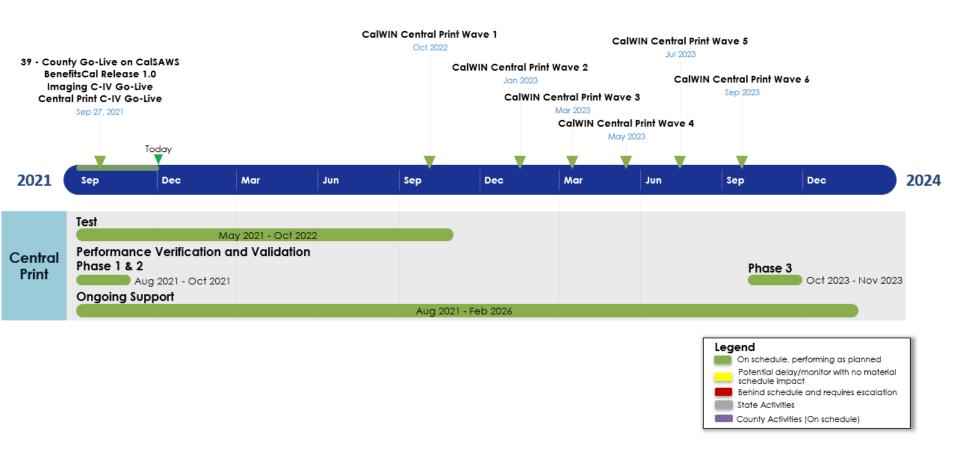
### High Level Overview - BenefitsCal



### High Level Overview - CalWIN OCM



### High Level Overview - Central Print



- Postage Analysis
- Correspondence Update

### Postage Analysis - Background

- Counties have reported an increase in postage usage since converting to CalSAWS
- Project staff have reviewed postage usage for October 2021 in CalSAWS and historical months in C-IV
  - The average increase across the 39 counties is 43%
  - The increase is tied to four factors across the two mail groupings, "standard mail" and "flat mail"

### Postage Analysis - Overview

- 1. USPS Postage Rate Increase on August 29, 2021
  - Standard Mail 6.8% postage increase
  - Flat Mail 6.8% to 13.8% postage increase depending on the weight. This impacted approximately 1/3 of the 6 x 10 envelopes
- 2. Flat Mail Changes
  - Approximate 2/3 of the 6x10 envelopes are at a 64% higher postage rate due to the increase in weight/thickness (e.g. 4 oz to 9 oz)
  - MC RE Packets increased by 3 to 11 pages per packet
  - MC REs sent in October were for December 2021 REs. The highest volume of MC REs in any given calendar year occur in December
- 3. Duplicate Packets
  - Approximate 7,400 (October) and 2,600 (November) duplicate non Magi screening packets were sent across the 40 counties
  - Postage credit will be issued per County
- 4. Address Placement in the Window IMB postage discount
  - Flat Mail 6.9% to 9.2% postage increase depending on the weight

### Postage Analysis – Next Steps

- 1. USPS Postage Rate Increase
  - No action items
- 2. Flat Mail Changes
  - Confirm county postage allocations for the current year premise funding for MC RE packets
  - Distribute guidance to counties on claiming for MC RE packets
- 3. Duplicate Packets
  - Issue the postage credit to the counties. Targeted for January 1, 2022
- 4. Address Placement in the Window IMB postage discount
  - Implement changes by January 31, 2022
- 5. Future SCRs for new or redesigned State Forms and NOAs
  - Elevate the postage impacts with Counties and State Partners
  - Calculate postage impacts for future policy items
  - Discuss approach for counties to request funding for postage increases stemming from policy changes

### Correspondence Update

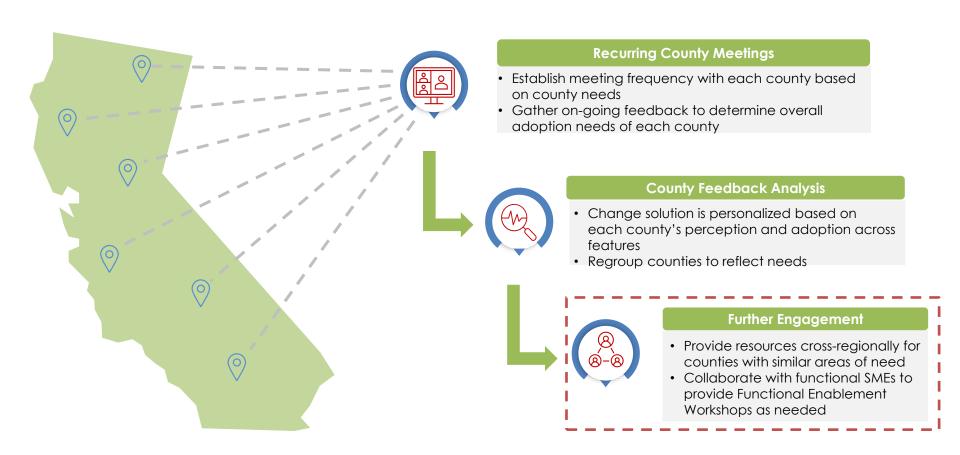
- Analysis:
  - Completing reviewing language translations for 155 of 432 State forms
    - Four CRPCs sent for State Partner input
    - → Target date for completing analysis of remaining forms is January 31, 2022
  - Commencing reviewing language translations for Notices of Action (NOA)
    - Two CRPCs sent for State Partner input
    - Target date for completing analysis of NOAs is January 31, 2022
- Design:
  - Editability of Forms: Design in Process
  - Translations: Design in Process for Spanish translations for State forms
  - Automated NOAs: Design in Process for top two priorities
- Mobilization:
  - Completed user group recruitment. Kick off meeting to be held in December.
  - Completed assessment for work to be completed this State fiscal year
  - Commenced rolling on additional staff for correspondence work

## Enhanced Support for former C-IV Counties

- Engagement Strategy
- County Action Plans

### **Engagement Strategy**

Approach for engagement, supporting, and measuring progress



### Identified Interventions

### Areas of Focus:

1

#### 'Hot Spot' Learning Aids

Guides for support areas identified by county deep dives

2

### Functionality Workshops & Office Hours

Tailored sessions facilitated by Subject Matter Experts (SMEs) to address areas requiring support 3

### Super User Community (Forumbee)

Easy to use platform to empower county-to-county discussions, share best practices and find answers to questions 4

#### Learning Experience Enhancement

Revamped learning strategy with bite-sized videos, learning pathways

Est. Completion: 12/13

Delivery: 12/8 - 12 /17

**Kick-offs Completed** 

FY 2022

**Immediate Priorities** 

**Longer-term Priorities** 

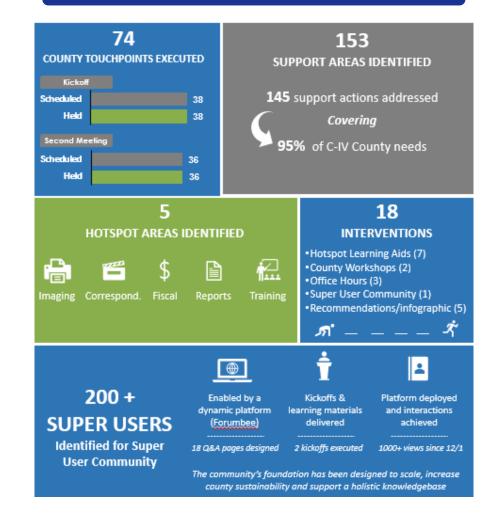
### County Action Plans

### Actioning County Feedback

#### **IDENTIFIED INTERVENTIONS**

- NOAs: to cover Trigger Conditions & Autopopulation logic for select NOAs
- Forms: to cover common forms questions, as well as forms generated through batch
- Correspondence Changes: to cover upcoming SCRs and interim process
- Imaging Aid: to provide a comprehensive list of materials and detailed descriptions of the content for each
- Imaging Infographic: to showcase problem area themes, impactful deployed system fixes/enhancements, along with upcoming fixes/enhancements
- Reports Best Practices: to cover how to find on-request reports, export reports quickly, and other common reports questions
- ServiceNow Best Practices Knowledge
   Article: to highlight the level of detail for a help desk ticket

#### **Expanded Support Metrics**



### Super User Community

### Enabled by Forumbee



Harnessing and leveraging the power of highly engaged and knowledgeable County members





### Unlocking the core benefits and value of a super user community

- ✓ Sustainable scaling
- ✓ Rapid support and resolution
- Crowdsourced expertise and depth of knowledge for functional/program support
- ✓ Informed community and ongoing feedback
- ✓ Simulated content creation and digital engagement

#### Forumbee Enabled

Leveraging Forumbee to host our super user community



Streamlined Communications



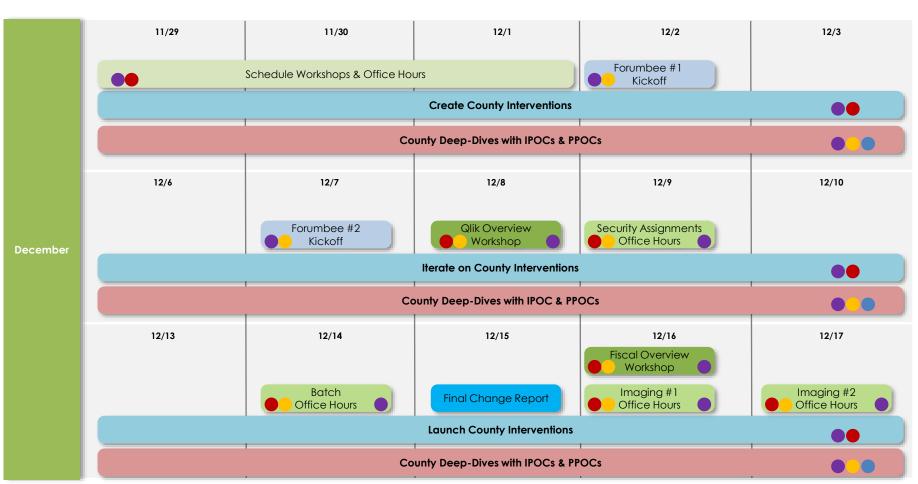
Accessible, Real-Time, Interactive Knowledge Base



Empowered County-to-County Communication

### **Engagement Calendar**





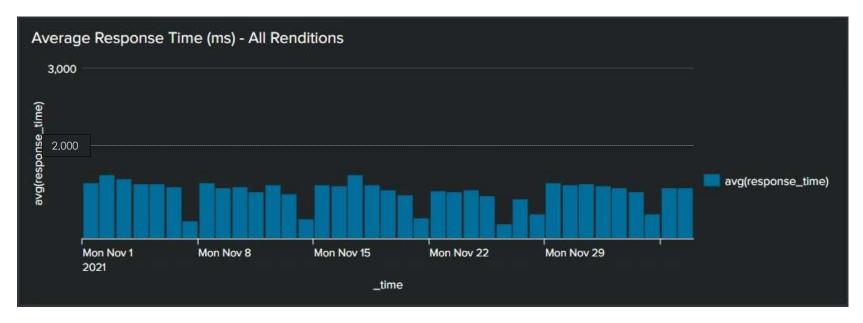
#### CalSAWS Imaging

- Post Go Live Performance
- Issue Resolution
- OCR Update
- Performance Testing Update
- Los Angeles Progress Checkpoint
- CalWIN Image Migration Summary



### Post Go-Live User Experience

System stability and improved user experience after actions taken



11/1 - 12/7; All Sizes 3,000 milliseconds = 3 seconds

Since 10/15, we have maintained consistent performance with the average response times under 2 seconds on all sized documents

- Improved System Performance through tuning of the infrastructure
- Document scanning/ingestion has been separated from the Brainware OCR process flows in the back-end architecture which will insulate end users from slow down of system response times
- Ongoing focus on Brainware OCR accuracy will result in further reductions in images that are routed to the Exception queues.

### Delivered Business Improvements

These key business improvements have been delivered via defects and enhancements since go-live:

#### **Process Changes:**

- Reduced items in queues by removing work items with no documents
- Page duplication has been addressed to reduce county processing time of documents
- Improved BenefitsCal document routing process to prevent items from routing to exception queues

#### Productivity enhancements due to system modifications:

- Increased image display speed by reducing image sizes to max of 8MB
- Improved the reliability of images displaying when selected
- Improved the reliability of BenefitsCal document submissions
- Person scope routing updated to ensure correct office level distribution of documents
- Added case number to workflow items to improve searchability of workflow queues
- Improved ICT documents routing process to prevent items from routing to exception queues
- Improved how quickly documents make it to destination queues

### **Upcoming Changes**

Upcoming changes that are being worked on today:

**Process Changes:** 

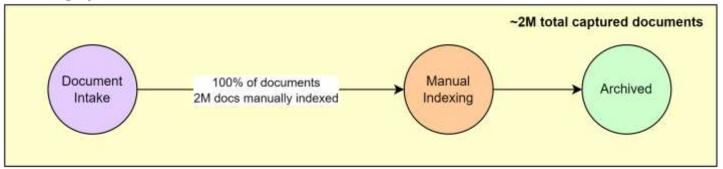
- Changes to queue/document views to ensure the most relevant data is prioritized in display
- Adding option to bypass OCR when indexing is completed at point of scan

Productivity enhancements due to system modifications:

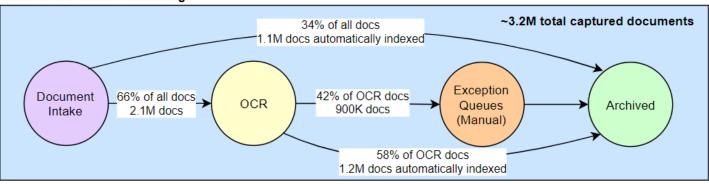
- Updated document information in search grid to indicate workflow location/status at-a-glance
- Adding workload inventory page icon to indicate to case/eligibility staff that a document has been received
- Retroactive updates to automatically finalize documents in exception queues, and reduce county workload
- Further improvements to workflow/system processing speeds
- Further improvements to image display reliability
- Further improvements to OCR classifications

### Improvements in Exception Queue Processing

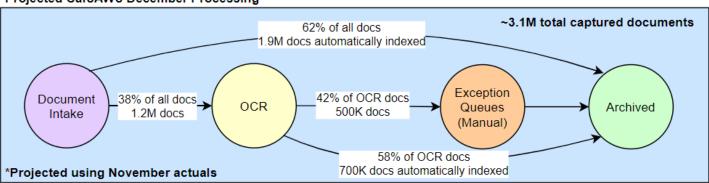
#### C-IV Legacy Flow



#### CalSAWS October Processing



#### **Projected CalSAWS December Processing**



### **Business Process Improvements**

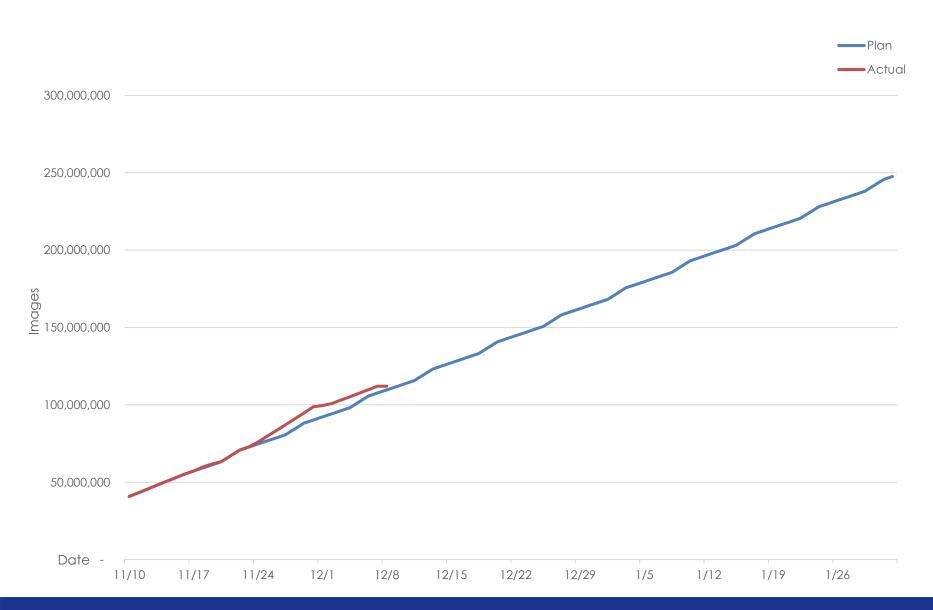
- The project team visited a subset of county sites
  - Shadowed workers performing daily tasks
  - Identified desired enhancements
  - Identified areas to improve on training materials
- Provided extended enhanced deployment support
  - Hosted Regional Imaging Demonstrations and Stakeholder Meetings
  - Provided Targeted Q&A Imaging Sessions
- CITs and Fact Sheets distributed
  - Scanning Best Practices
  - Imaging Business Process Fact-Sheets
- Established Center of Excellence Team

### Enhanced Performance Testing Update

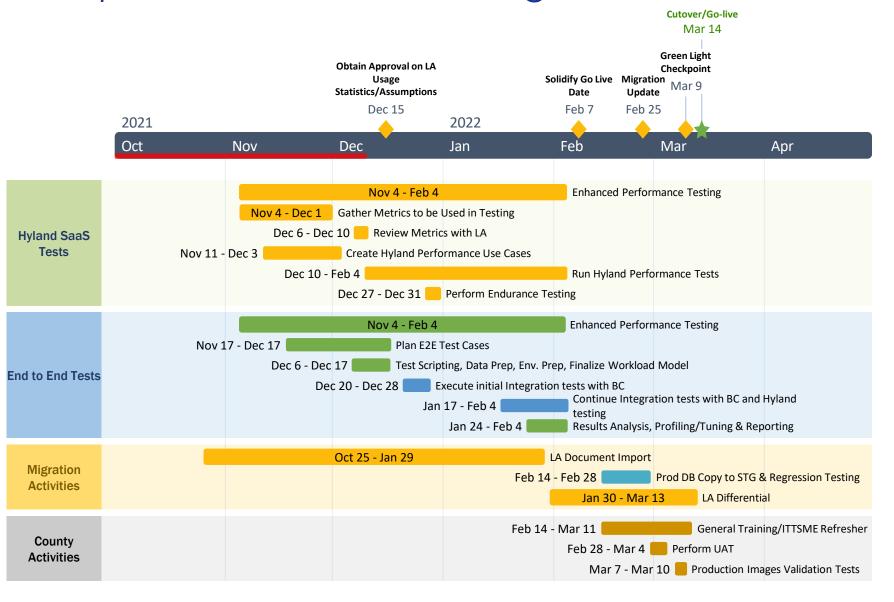
### **Preparations Phase**

- The project team collaborated with LA County to gather LA County usage metrics
- Hyland is planning and performing another iteration of performance tests
- Accenture is coordinating across imaging entities for a full-scale end to end test
- ClearBest is reviewing all testing materials and will be integrated into the testing process

### LA Document Import Burn-Up-Revised Schedule



### Proposed/Tentative Los Angeles Go Live Plan Draft



### CalWIN Image Migration Status: Wave 1-3

County/ Waves	Target Dates	Kick Off	Identify Migration Method/Vendor	Test Network	Document Mapping	Test Batch	Initial Export	Initial Import	Delta Export/ Import	Final Batch	Go-Live/% Overall Progress
W1. Contra Costa	Start	7/16/20	10/01/20	08/06/20	08/17/20	01/03/22	02/01/22	06/01/22	06/01/22	10/03/22	10/24/22
	Finish	7/16/20 -100%	9/27/21 - 100%	10/06/20 - 100%	12/15/21	01/28/22	05/31/22	06/30/22	10/02/22	10/20/22	12% Progress
W1. Placer	Start	7/29/20	10/01/20	08/06/20	08/31/20	04/01/21	01/03/22	03/14/22	03/14/22	10/03/22	10/24/22 30%
	Finish	7/29/20 - 100%	10/01/20 - 100%	10/06/20 - 100%	03/26/21 - 100%	12/30/21-80%	03/11/22	05/13/22	10/02/22	10/20/22	Progress
W1. Yolo	Start	7/21/20	10/01/20	08/06/20	08/25/20	01/03/22	02/01/22	06/01/22	06/01/22	10/3/22	10/24/22 12%
	Finish	7/21/20 - 100%	10/18/21 - 100%	10/06/20 - 100%	1/29/21 - 100%	01/28/22	05/31/22	06/30/22	10/02/22	10/20/22	Progress
W2. Santa Clara	Start	10/15/20	12/01/20	11/30/20	11/10/20	02/01/22	03/16/22	09/08/22	09/01/22	02/01/23	02/20/23
	Finish	10/15/20 - 100%	<del>12/30/21</del> 1/20/22 - 85%	01/31/21 - 100%	08/27/21 - 100%	03/15/22	08/31/22	10/20/22	01/31/23	02/16/23	10% Progress
W2. Tulare	Start	10/05/20	12/01/20	11/30/20	12/02/20	08/02/21	01/03/22	01/03/22	4/16/22	02/01/23	02/20/23 20%
	Finish	10/05/20 - 100%	12/01/20 - 100%	01/31/21 - 100%	7/29/21 - 100%	12/30/21 - 70%	04/15/22	04/15/22	01/31/23	02/16/23	Progress
W3. Orange	Start	01/07/21	03/01/21	03/01/21	02/02/21	04/30/21	01/03/22	08/01/22	08/01/22	04/01/23	04/24/23
	Finish	01/07/21 - 100%	03/01/21 - 100%	04/30/21 - 100%	04/22/21- 100%	12/30/21-80%	08/01/22	01/31/23	03/31/23	04/20/23	30% Progress
W3. Santa Barbara	Start	1/14/21	3/1/21	08/1/21	02/11/21	01/03/22	03/01/22	08/01/22	08/01/22	04/01/23	04/24/23
	Finish	1/14/21 - 100%	3/1/21 - 100%	11/15/21 - 100%	12/30/21 - 100%	02/28/22	08/01/22	01/31/23	03/31/23	04/20/23	10% Progress
W3. Ventura	Start	01/19/21	03/01/21	03/01/21	02/18/21	06/30/21	01/03/22	01/03/22	08/01/22	04/01/23	04/24/23
	Finish	01/19/21 - 100%	03/01/21 - 100%	04/30/21 - 100%	05/31/21-100%	12/30/21 - 90%	08/01/22	07/05/22	03/31/23	04/20/23	40% Progress

**Legend:** Completed On Schedule Possible Risk Behind schedule and requires escalation

#### Key Milestones/Datapoint the CalWIN Counties should keep in mind throughout this journey:

- Document mapping is a detailed process and batch testing is dependent on its completion. It is critical that counties complete
  document mappings by the scheduled deadlines. As an example, Counties should map their current imaging document type
  Person Verifications to Imaging form IMG 000. Counties should not confuse this with mapping county form ABC 123 to Imaging form
  IMG 000.
- The project recommends transferring images over the network and to consider the AWS Snowball as a back up option
- If network bandwidth is a concern, the project recommends that the county conduct a smoke test before opting out of the AWS CLI, online transfer.
- Prepare a data reconciliation plan before sending your initial export to ensure the data transferred matches the original

### BenefitsCal Update

- Metrics for each Application Stream
- CX Measures Update
- BenefitsCal Collaboration Model

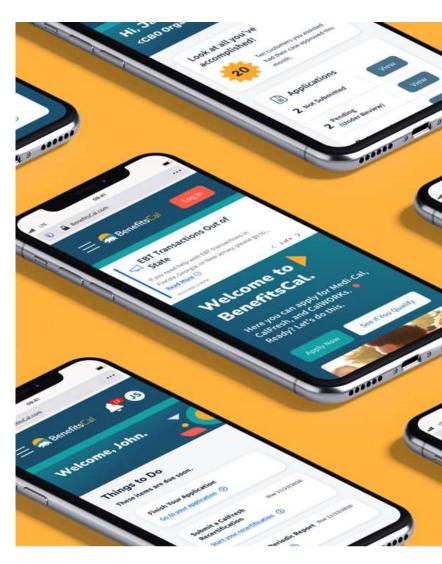
### BenefitsCal Post Go-Live

Preliminary Usage Statistics between September 27<sup>th</sup> to November 30<sup>th</sup>



### BenefitsCal Collaboration Model - Draft

- UCD Journey: Success and learning in Release 1.0
- 2 An opportunity, to formalize the model
- 3 Process overview
- 4 Next steps



# Through Release 1.0, the BenefitsCal team followed User Centered Design Processes and engaged a diverse group of stakeholders



#### **Methods**

- Surveys
- Interviews
- Focus Groups
- Facilitated Usability Tests
- Unmoderated Usability Tests
- Production Monitoring

#### **Technologies**

- Amplitude
- Medallia
- Loop11
- LogRocket
- Figma
- AWS Lex
- D Survey tool

Through pioneering, we engaged the community in new ways, through many channels and tools

## The UCD team engaged a diverse number of customers...

...after careful analysis of the demographics in California, to hear all voices and perspectives.

#### Self Employed

Users working for non-employer establishments

#### Student •

Users currently enrolled in community college or 4-year university

#### Unemployed

Users who are currently unemployed

#### Domestic Violence Survivors\*\*

Users who are survivors of domestic violence

#### Non-High School Graduates\*\*

Users who have not completed high school

#### IHSS Workers and Beneficiaries\*\*

Users who are IHSS workers and beneficiaries

#### Legend

- Customers with attribute have participated in UCD research
- Customers with this attribute have not yet participated in UCD research

\*Identified as primary attribute/user group by the Advocate community

\*\* Identified as secondary attribute/user group by the Advocate community

#### Asian or Pacific Islander Origin\*\*

Users of Asian or Pacific Islander Origin

#### Formerly Incarcerated\*

Users who have served time imprisoned

#### Hispanic/Latin Origin\*\* ●

Users of Hispanic or Latinx Origin

#### Households w limited access to technology\*\*

Users who do not have a computer at home or limited access to technology

#### Immigrant Persons\*

Users who are not born in the US

#### In poverty\*\*

Users with income less than the Census family threshold

#### Multi-member Household

Users who have above average number of household members, includes those with children and multiple/extended families

#### Older Adults Age 65+\*

Users aged 65 or above

#### Physically Disabled\*

Users who are physically disabled

#### Refugee/Asylee Arrivals\*

Users who are refugee or asylee arrivals

#### Black/African American Households\*

Users who of Black/African American Origin

#### Persons who use an Authorized Rep\*

Users who use an AR to fulfil the benefits process

#### Eligible but Unenrolled\*\*

Users who may be eligible but haven't applied for benefits

#### Persons who need Emergency Services

Users who require disaster services and/or emergency assistance

### Houseless Persons\*\* Users who do not have shelter

#### Indigenous/First Peoples Households\*

Users of Indigenous/First Peoples Origin

#### LGBTQIA+\*

Users who self-identify as LGBTQIA+

#### Low Literacy\*\*

Users who have trouble reading or communicating

#### Mental & Behavioral Health/illness and Substance Users\*\*

Users with mental and/or behavioural health issues and substance users

#### Non-English Speakers\*

Users that do not speak English as their primary language

#### Cognitively Disabled\*

Users who are cognitively disabled

#### Former Foster Youth\*

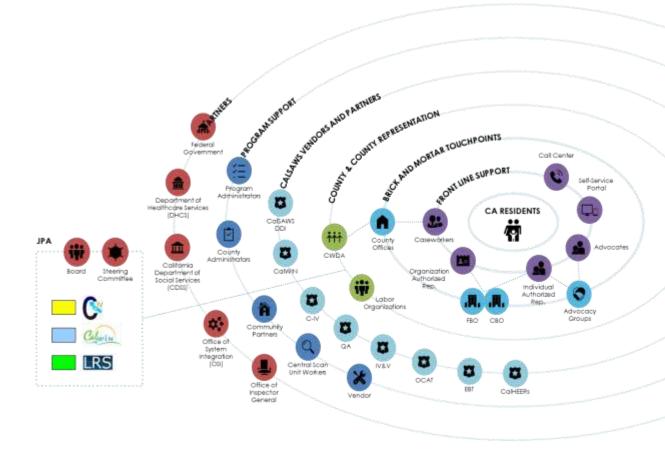
Users under 18 who were previously in foster care

## The stakeholders of BenefitsCal are diverse and distributed...

And everyone was engaged in the success of Release 1.0.

## Everyone comes from a different perspective.

The role of the stakeholder engagement is to **shine a light on those differences**, to seek to understand, and to facilitate safe spaces to **find alignment** and continue the mission.



# As we look to the future, a new model will formalize the ways in which stakeholders will continue to be engaged

California Legislation excerpts for CalSAWS stakeholder engagement, from Sec.16-17:

- Goals of: (1) Minimizing the burden of the overall eligibility process... (2) Facilitating applicant and client submission of feedback.
- "A formal process for health and human services advocates and clients to provide input into new or changing public facing elements..."
- "Champion the user experience..."
- "Engage stakeholders, advocates and clients in the design, development and test tasks through the UCD and test processes..."
- "May include focus groups, user-centered design sessions, and user acceptance testing..."
- "Discuss current and planned functionality changes, system demonstrations...advocates' identification of areas of concern..."

"I love that so much. You make me feel valued. Thank you! It's important. Thank you for trying to make things easier for everyone."

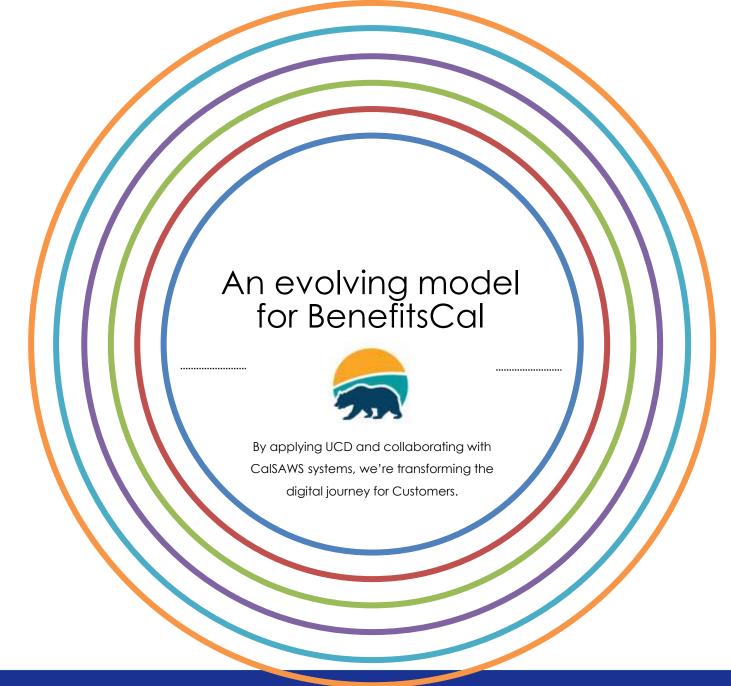
- Customer, Riverside County

"I'm happy to [do the usability test] because it's really important. I received benefits and I really needed them...
There are people out there that really need help and we should do anything we can to help."

- Customer, Santa Barbara County

"The time spent workshopping the BenefitsCal website and application flow in the lead up to the BenefitsCal go-live was an encouraging model of collaboration."

- Advocate co-lead:



## Why do we need to evolve?

BenefitsCal is now live. What's next?

The approach we used to define RFP requirements is different than we need to enhance and maintain the system.

It's time to formalize the UCD and inclusive practices implemented through Release 1.0.

#### Stakeholder Inclusion

Defines the many inputs to the process, where ideas are elicited from meetings, testing, experimentation, large legislative priorities, changing policies, and more.

#### Roles and Responsibilities

We all have a role to play. Defining these roles and responsibilities provides predictability and transparency: we know what to expect from each other.

### **Decision-making Framework**

Everyone joins the process with a different lens and perspective. Establishing a decision-making framework is essential to forward progress.

#### **Processes**

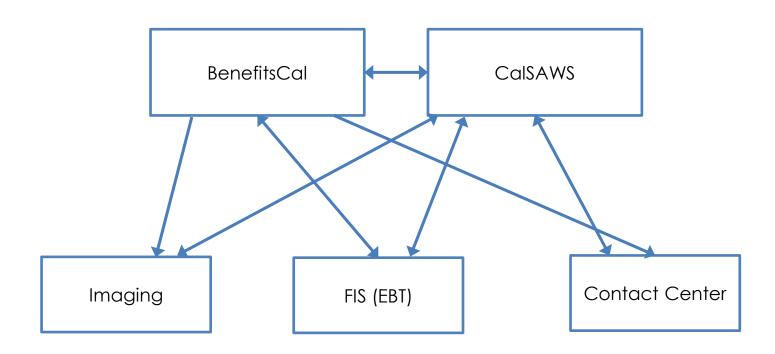
Tools, techniques, repeatable processes, repeatable calendars, and more are needed to operate the model.

#### **Risk and Change Management Tools**

Changes are reviewed and coordinated with many stakeholder groups to ultimately deliver a positive and stable outcome for users (policy, security, operations, technology, usability, and more).

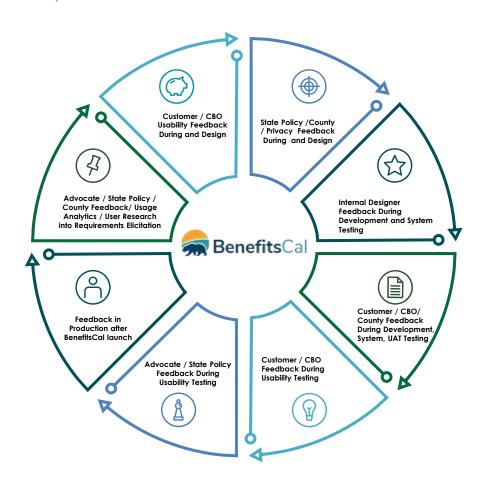
## BenefitsCal is an integrated part of the CalSAWS ecosystem...

...and the changes to and measurement of BenefitsCal will collaboratively align with interfacing systems. Each partner system has their own release schedule.

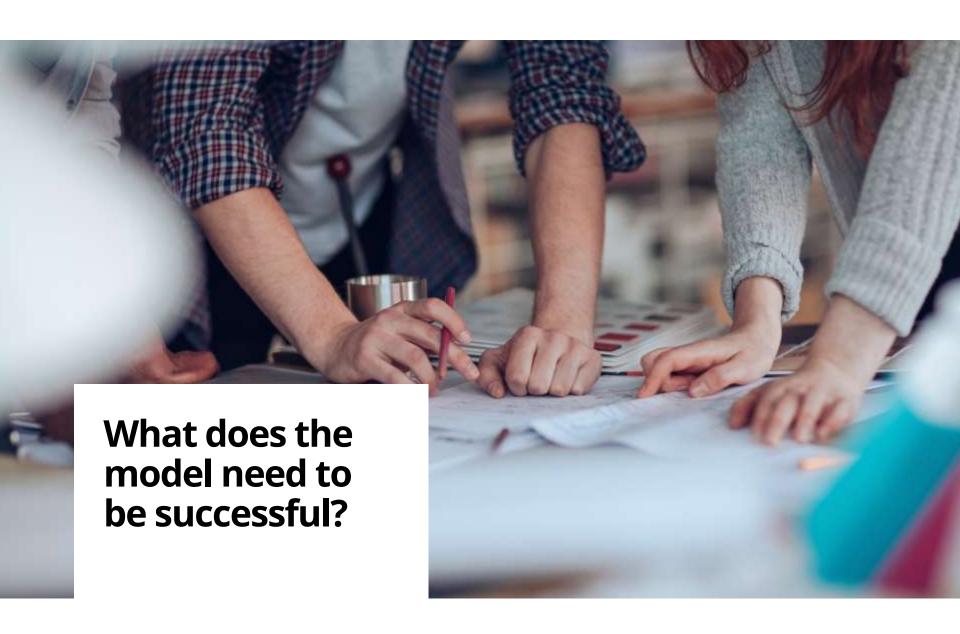


## BenefitsCal Feedback Framework

Our current feedback framework has engaged our diverse stakeholder group throughout the project lifecycle starting from a defined set of requirements



Release 1.0, 1,1, 1.2 and 2.0 feedback largely focused on **program** compliance and usability



## **Guiding Principles**

As the team gathered customer feedback, and navigated Release 1.0, the project team identified a number goals to guide the future model



### Mission-Driven

Regular strategic planning sessions will help us to validate most critical priorities, to serve Californians, together.



#### Humancentric

End to end views will help to understand the holistic views.



#### Data-Driven

impact, to capacity and release plans, outcomes assessments, and more: data and facts will guide the process.

From prioritization and



#### Responsive

Measuring responses in days (not months) for critical findings. Faster, nimble-driven releases based are needed.



#### **Innovative**

Innovation and experimentation are encouraged.



#### Inclusive

Every voice and request is included in the process.



#### Secure

Emphasis placed on protecting information that the public entrusts us to receive.

## Future efforts need to be rooted in regular **strategic planning meetings** to **align all stakeholders on the highest priorities** to be addressed via BenefitsCal

#### How will we approach prioritization?

- Hosted quarterly (separate from the CDSS Quarterly Stakeholder meeting)
- Facilitated by the BenefitsCal workgroup
- Participants share perspective on priorities
- Objective is to align and agree to the most critical problems to collectively solve together for the upcoming releases (e.g., college student enrollment in CalFresh)
- Objectives guide the scope of the next releases

## Better Together: the benefits of mission-driven prioritization

- Easier release coordination
- Based on outcomes and is specific and measurable
- Opportunity to reflect on results

## Decision Making Needs to Account for Overall Priorities within a Fixed Capacity

The sample list below would allow the project team to focus on those requests that are most important. What also needs consideration?

- Align to strategic planning objectives?
- Improve the quality of information collected within the application?
- Improve the speed/accuracy with which customers receive benefits (service design for the benefits journey)?
- Reduce the workload burden for County staff and Assisters?
- Improve the customer and CBO experiences?
- Creates capacity by reducing maintenance and enhancements efforts?
- Workaround feasible?
- Potential risk and impact to customer if not implemented timely?
- Balancing categories?
- Automation level?

## Representation Needs to Encompass our Stakeholders

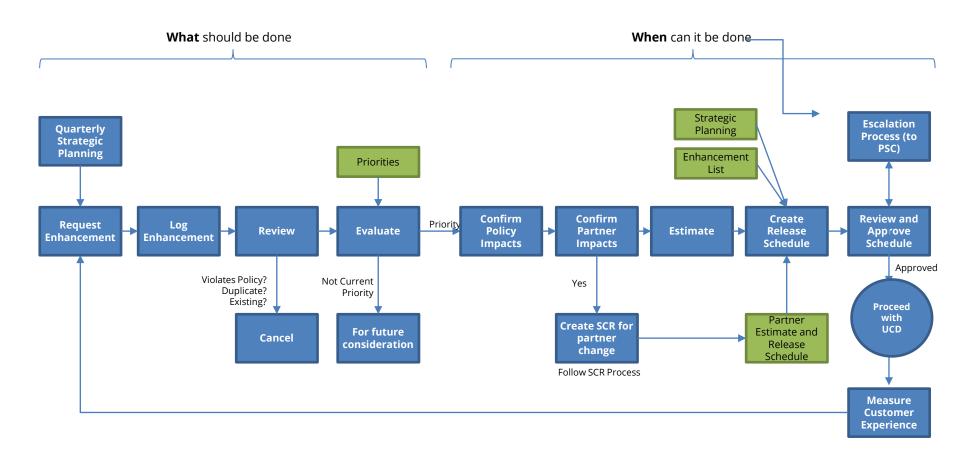
Proposal to form a New Workgroup focused on BenefitsCal

External Stakeholders		Internal Stakeholders	#
Customers	6	<ul> <li>Consortium</li> <li>Project Manager</li> <li>Customer Engagement Section Director</li> <li>Policy &amp; Design Section Director</li> <li>Technical &amp; Operations Director and Information Security Officer (optional based on need)</li> </ul>	
Community Based Organizations (CBOs)	2	DHCS - Medi-Cal	
Advocates - Co-leads	3	CDSS - CalFresh, CalWORKS, CAPI, Welfare to Work	
County Welfare Directors Association (CWDA)	3	3 OSI	
Service Employee International Union (SEIU)		Counties	6
		BenefitsCal Vendor Project Team	
		QA Team	
		CalSAWS Vendor Project Team (as needed for CalSAWS changes)	

## BenefitsCal Input and Prioritization Needs Enhanced Processes

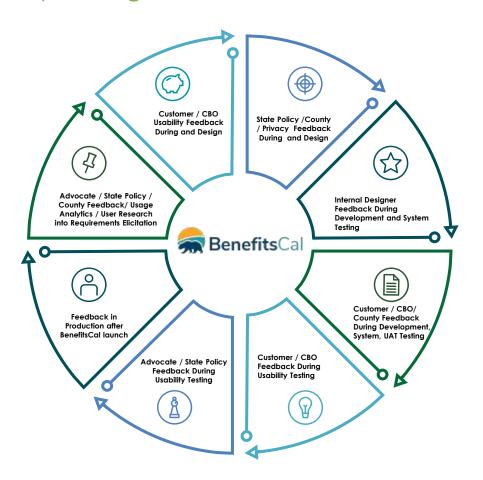
Process flow supports all BenefitsCal changes (system, communications and measurement)

Input Process



## BenefitsCal Feedback Framework Needs to be Extended

The current framework that has served us well for program compliance and usability items needs to be extended to other areas impacting BenefitsCal



**Program Compliance** 

Usability Accessibility

**Customer Experience Measurement** 

**Workload Reduction** 

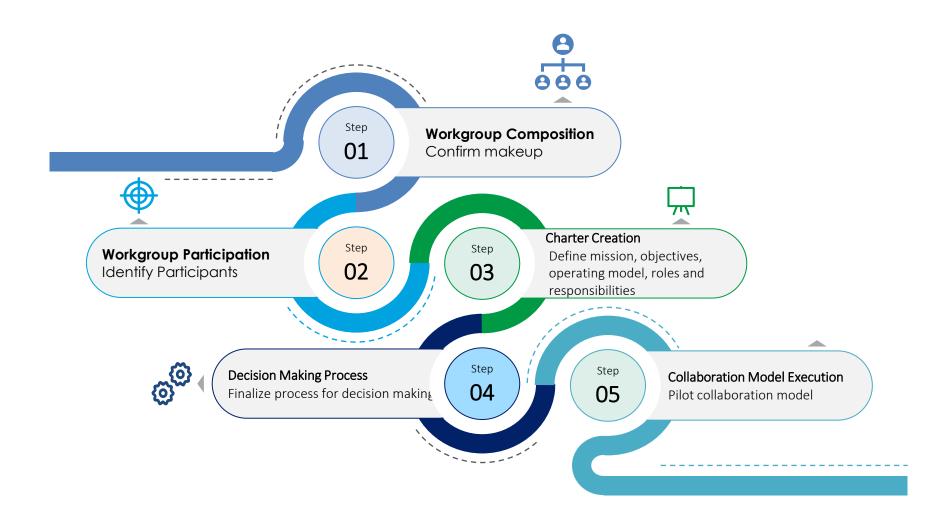
**Technical Modernization** 

Security / Privacy

Accuracy Equity

**Program Retention** 

## Next Steps



Policy and Application Development Update

## Policy and Application Development

Release 22.01 (and 22.01x) Highlights

SCR	Topic
CA-225639	MEDIL I 21-03 Update Delivery of Asset Verification Reports
CA-222221 CA-226308	Additional Updates and Run Batch EDBC for CalFresh SSA COLA effective 03/2022
CA-228332	ACL 21-52 Opt-in All Counties to Sending Pre-Populated CF 285
CA-220040 CA-230192	ACL 20-145, 20-146 Eliminate ESAP SAR 7 Requirement, Update ESAP NOAs and Run Batch
CA-221837	ACL 20-145 Generate One Time Mailer CF 34 to CalFresh ESAP Households
CA-235136	Pro-rate CF Minimum Allotment for CE/MCE Households
CA-232327	DDID 1631 - Update State Cycle Number on Daily/Monthly Collection Reports

## Policy and Application Development

## **Upcoming Policy Timeline**

- **22.02** 
  - Expand access to Medi-Cal to all income eligible Californians, regardless of immigration status
  - Post Partum Expansion expand to 12 months
- **22.03** 
  - CW Eliminate 24/48 MTC
  - CW Pregnancy Special Needs increase to \$100
- **22.05** 
  - CF/CW Overpayment changes (2 year look back)
  - CW Pregnancy changes
    - → Eligibility at app date for pregnant persons <18 with no other aided children when pregnancy is verified (can be sworn statement or verbal attestation) and the Cal Learn program is operative.
    - → Eligibility at app date for pregnant persons > 18 with no other aided children when pregnancy is verified (can be sworn statement or verbal attestation).
    - Requires a pregnancy loss/end to be reported within one month
  - Foster Care Housing Supplement for Transitional Housing Payment (THP)+ Non-Minor Dependent (NMD) Program

## Policy and Application Development

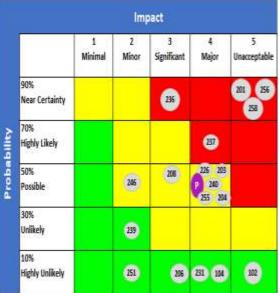
## Upcoming Policy Timeline

- 22.05 Continued
  - Asset verification request for applicants
  - Increase the Non-MAGI MC asset limit to 130k for 1 individual and 65k for each additional person up to 10
  - Applicant Earned Income Disregard- increase the Applicant EID to from \$90 to \$450
- **22.06** 
  - SB 1065 Homeless Assistance Changes
- 22.07 Priority
  - CF COLA
  - FC CNI
- **22.09** 
  - All Global Telephonic Signature Solution

Risks & Issue Update



#### CalSAWS Risk & Issues Executive Summary



P Overall Project

High = 5 Med = 7 Low = 6 DD&I = 16 M&O= 2

Risk Total: 18

Total New Risks: 2

Total Retired Risks: 9

Project Average Risk Exposure: 1.8

\*\* No Project Issues

Risk 102: Lack of annual project funding may cause schedule delay or reduction in scope for CalSAWS M&O & other projects Risk 104: Functionality gaps between the 3 systems may result in a loss of functionality during migration to CalSAWS Risk 201: Pace of policy changes may exceed capacity of the project teams, resulting in less automation Risk 203 (Lowered from High to Med.): Project communications must be enhanced, otherwise stakeholder / audience needs will not be met Risk 204: Volume of changes to baseline code may cause degradation in quality & increase in defects Risk 206: Delays in staffing the Consortium and/or Accenture teams may delay the project schedule Risk 208: CalHEERS release readiness delays may impact CalSAWS delivery timelines, slowing critical updates to counties Risk 226: COVID-19 relief efforts may impact CalSAWS DD&I schedule Risk 231: Delay of web browser compliance may impact users who do not use MS Internet Explorer Risk 234 (Retired): The November 2021 implementation of Imaging and BenefitsCal for LA county may be impacted due to a delay of the complete migration of LA county's images Risk 235 (Retired): The BenefitsCal project release 1.0 may be delayed due to integration with the CalSAWS interface Risk 236 (Raised from Med. To High): The scaling of Analytics Dashboards and Reports for 58 Counties may have an impact on System Batch Performance Risk 237 (Raised from Med. To High): The scaling of Batch for 58 counties may have an impact on system performance Risk 239: Lack of consistent State language translation approach may cause schedule delays and rework Risk 240: The scaling of CalSAWS Production Operations, including Batch Operations, to provide 58 County support, without effectively taking into account the multi-county and multi-vendor CalSAWS ecosystem may impact business operations Risk 243 (Retired): Spike in COVID-19 in India affecting BenefitsCal offshore team may impact Go-Live Risk 246: Perceived gap in functionality with GetCalFresh may impact adoption and migration schedule of BenefitsCal Risk 247 (Retired): BenefitsCal changes identified after 06/14/21 may not be addressed Risk 248 (Retired): The C-IV Imaging go live may not have images older than 2/28/21 due to delays in the C-IV image migration Risk 249 (Retired): C-IV Cutover Activities are At-Risk of not completing within the Planned 84-hour window Risk 250 (Retired): The delay in CF Allotments may impact the C-IV Cutover timeline and post-implementation Risk 251: BenefitsCal Language Translation Testing and Updates may not be completed timely Risk 252 (Retired): Legacy Data Solution (LDS) resource and schedule challenges could impact delivery Risk 253 (Retired): The wildfires in several counties could impact County Readiness for C-IV Go-Live Risk 255 (New): Global paper shortage may impact CalSAWS ability to print/mail correspondence Risk 256: Imaging scalability and performance degradation may impact the go-live dates for upcoming counties Risk 258 (New): The CalWIN Conversion Cutover Window is at-risk of completing past the 84-hour cutover window

### CalSAWS Retired Risks – 9/27/2021 C-IV Cutover & BenefitsCal Release 1.0 Complete

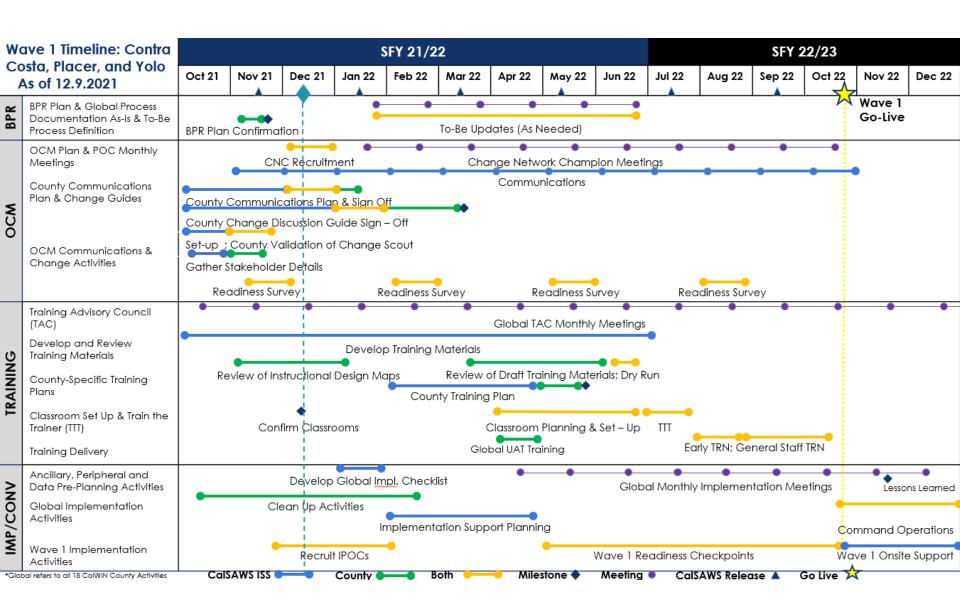
Risk #	Risk Name	Risk Level
234	The November 2021 implementation of Imaging and BenefitsCal for LA county may be impacted due to a delay of the complete migration of LA county's images	Medium
235	The BenefitsCal project release 1.0 may be delayed due to integration with the CalSAWS interface	Medium
243	Spike in COVID-19 cases in India affecting BenefitsCal offshore team may impact Sept. 2021 Go-Live	Low
247	BenefitsCal changes identified after 06/14/21 may not be addressed	High
248	The C-IV Imaging go live may not have images older than 2/28/21 due to delays in the C-IV image migration	Medium
249	C-IV Cutover Activities are At-Risk of not completing within the Planned 84-hour window	Medium
250	The delay in CF Allotments may impact the C-IV Cutover timeline and post-implementation	Low
252	Legacy Data Solution (LDS) resource and schedule challenges could impact delivery	Low
253	The wildfires in several counties could impact County Readiness for C-IV Go-Live	High

### CalSAWS Project High/New Risk Update

Risk #	Risk Name	Risk Level
201	Pace of policy changes may exceed capacity of the project teams, resulting in less automation	High
236	The scaling of Analytics Dashboards and Reports for 58 Counties may have an impact on System Batch Performance	High
237	The scaling of Batch for 58 counties may have an impact on system performance	High
256	Imaging scalability and performance degradation may impact the go-live dates for upcoming counties	High
258 (New)	The CalWIN Conversion Cutover Window is at-risk of completing past the 84-hour cutover window	High
255 (New)	Global paper shortage may impact CalSAWS ability to print/mail correspondence	Medium

## CalWIN ISS Update

## Wave 1 Timelines



## Business Process Reengineering (BPR)

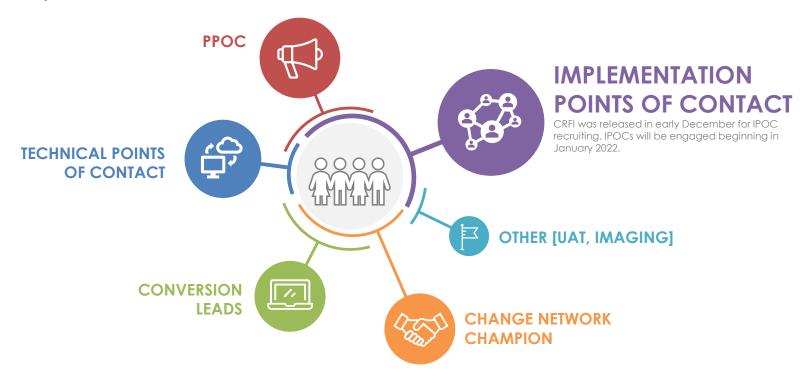
### To-Be Status

- Waves 1-2
  - Wave-1 To-Be Sessions COMPLETE
  - Wave-1 To-Be Final Work Product (FWP) Sign-Off COMPLETE
  - Wave-2 To-Be Sessions COMPLETE
  - Wave-2 To-Be Final Work Product (FWP) Sign-Off COMPLETE
- Wave 3
  - Wave-3 To-Be Sessions (Santa Barbara) COMPLETE
  - Wave-3 To-Be Draft Work Product (DWP) Review (Santa Barbara) – COMPLETE
  - Wave-3 To-Be Sessions (Orange & Ventura) IN-PROGRESS
- Waves 4-6
  - Waves 4-6 To-Be preparation IN-PROGRESS

## **Implementation**

## County Resources Supporting Implementation

The Technical Point of Contact (TPOC) and the Implementation Points of Contact (IPOC) will help assess the County readiness throughout the migration phases



## Implementation Points of Contact

## IPOC Responsibilities



Stay informed on Implementation activities and status; monitor and report County readiness



Attend
Checkpoint
Meetings
and disseminate
Implementation
information to
County Users
(confirm enduser
comprehension)



Track
County/Site
Readiness and
escalate
challenges
and/or issues



Coordinate and collaborate with the TPOC for technical readiness needs (infra, network, performance) and cross project teams



Work with
Implementation
Team and
TPOC to
compile/
complete items
on the County
Readiness
Checklist



Assist with post go-live support (coordinate and support the TOSS teams, command center operations and issue identification and escalation)

## Implementation Approach

11.30.21



### Wave 1 County Specific Work Plan

The ISS Team presented Wave 1 counties with a county-specific work plan focusing on activities or tasks for the County to act on during the T-12 timeframe

12.30.21



#### County Readiness Checklists

County staff (such as IPOCs and TPOCs) and Project Staff (such as CalSAWS TOSS, Implementation Teams) will work together to maintain the county readiness checklists. The checklists track and monitor readiness progress for each County leading into the migration.

01.04.22



#### Implementation Lead Toolkit, Communications Toolkit + Training Toolkit

CalSAWS TOSS utilize these toolkits when they begin working with County staff. The Toolkits are comprised of tools, standard project communications such as infographics and templates. They are a consistent starting point that CalSAWS TOSS will use and customize as needed with each County.

T-6



#### Implementation Readiness Dashboard + Packet

The Implementation Readiness Packet is a high-level overview of key milestones that contribute to the overall readiness of the CalWIN Migration to CalSAWS. The packet serves to inform the Counties on the progression and completion of Key Project and County Milestones. The Implementation Readiness Dashboard is a rolled-up, concise view of the Packet information.

Beginning at T-5



#### Green Light Governance Meetings

CalSAWS Project Leadership meetings reporting on golive preparations, activities and status.

## Organizational Change Management

## Change Network Champions to start in 2022

**Definition** 

A Change Network is comprised of individuals selected from offices and/or internal stakeholder groups that will be highly-impacted by the change.

Objective of the Change Network

To help guide counties through changes for CalSAWS implementation and adoption through facilitating communication, engagement, and other change activities.

## Change Network Champions (CNCs)

## Change Network Champion Timelines

CNC Wave Groups	Counties	CRFI Distribution	CNC Kick Off	Go-Live Date
Waves 1 & 2	Wave 1: Contra Costa, Placer, Yolo	December 6, 2021	January 2022	October 2022
waves i & z	Wave 2: Santa Clara, Tulare	December 6, 2021	January 2022	February 2023
Mayos 2.8.4	Wave 3: Orange, Santa Barbara, Ventura	June 2022	July 2022	April 2023
Waves 3 & 4	Wave 4: San Diego, San Mateo, Solano, Santa Cruz	June 2022	July 2022	June 2023
Wayos F 8 /	Wave 5: Alameda, Fresno, Sonoma	October 2022	November 2022	August 2023
Waves 5 & 6	Wave 6: Sacramento, San Francisco, San Luis Obispo	October 2022	November 2022	October 2023

## **Training**

## Training Advisory Council (TAC) topics

## November 18

- Reviewed the Training Development Timeline
- Demonstration of Learning Journey Map
- Continued our Discussion of Instructional Design Reviews

## December 15

- Instructional Design Reviews
- Instructor Guide template review

## Training Update

## CalWIN Training Approach



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

## CalWIN/CalSAWS UAT Preparation Update

## UAT CalWIN County UAT Purpose

### **PURPOSE**

User Acceptance Testing is to confirm the CalSAWS application meets the documented requirements within their business flows:

- Provides the opportunity to validate the functionality with converted data from an end-user perspective
- Allows end-users to validate County's end-to-end business processes:
  - Tested in accordance with the approved production functionality
  - Completed in dedicated environment with converted data and predefined county system configurability (e.g., Issuance Threshold amounts)





## **UAT Approach for CalWIN**

## Validating CalWIN Processes in CalSAWS

### UAT for all 18 CalWIN Counties will focus on:



#### **End-to-End Scenarios**

Validating End-to-End common workflow test scenarios with broad application and BPR coverage



#### **Lessons Learned**

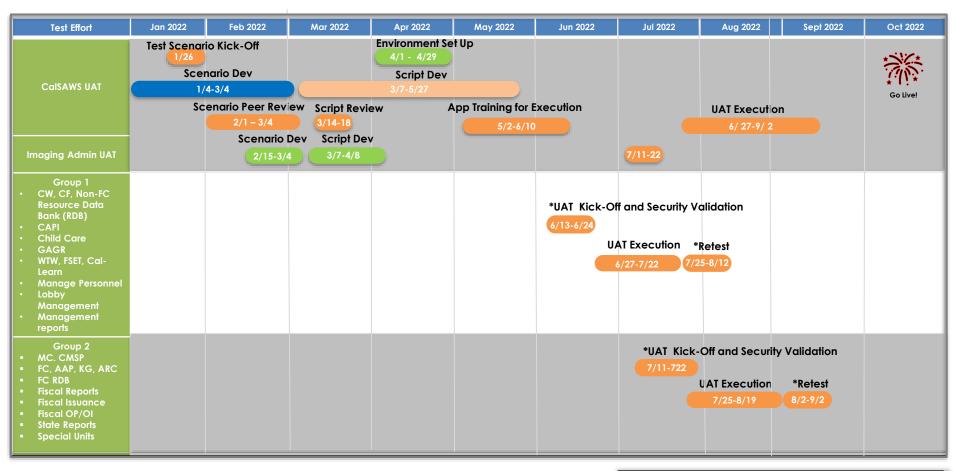
Integrating lessons learned from C-IV Migration into testing and validation



## Integrated Environment with Unmasked Data

Using an integrated environment leveraging "unmasked" county converted data and predefined county system configurability for data validation

## UAT Timeline High-Level UAT Timeline and Activities





## UAT Planning Regional and County Touchpoints



Meeting with Regional Managers November 15, 2021

#### **Regional Manager Meeting**

- Regions 1-6 attended
- UAT Overview provided with all regional managers
- Q&A



Meeting with CalWIN County PPOC and OPAC Members November 29, 2021

#### CalWIN PPOC and OPAC

- 18 county representation
- UAT Overview provided with all regional managers
- Q&A

#### **Recurring and Upcoming Meetings**

- Recurring meetings with OPAC
- January 27, 2022
   JPA General Membership Meeting
- January 14, 2022
   CalWIN WCDS Subcommittee
   Meeting



County Participation
January 26, 2022
Test Scenario and
Script Kick-Off

## **UAT Preparation**

## Preparation → Getting Participants Ready!



## UAT Preparation Jan 26 – May 27, 2022

### Participants will join in:

- Kick-off Meeting
- Test scenario reviews and script development process training
- Weekly touch points

### **Test Scenario Development**

 CalWIN County participants will be provided a baseline of Test Scenarios to peer review, provide feedback and add additional scenarios as needed

### **Test Script Development**

- Application Training for CalWIN
   Participants will be provided via self-paced LMS and access to a hands-on CalSAWS environment
- Consortium and CalSAWS (40-Non CalWIN) County participants will participate in Test Script development
- CalWIN County participants will have the option to peer review and provide feedback for a subset of 2-3 Test Scripts

Multifactor Authentication (MFA)

## (MFA) Multifactor Authentication

## Applications and users

- MFA overview
- CalSAWS applications leverage a single sign-on solution (SSO) that enables access using a common set of login credentials.
  - CalSAWS SSO applications include:
    - CalSAWS Core Application
    - + OCAT
    - + ChildCare Administrator's Portal
    - + ServiceNow
    - CalSAWS Learning Management System(LMS)
    - + CalSAWS C-IV Contact Center

## (MFA) Multifactor Authentication

## Process and Support

- Roll out process:
  - Production release approach; Development(test) > Production
  - Prior to releasing to counties, we will implement with CalSAWS Project staff to ensure ease of usability and functionality.
  - MFA enablement for counties will be done in two phases;
     Phase one will include a small group of counties as a pilot phase, phase two will be the rest of the counties.
- Communication and Support:
  - CIT will be sent out to the counties with detailed information and timelines. The CIT will include an instructional guide and a video clip on how to register MFA.
  - Post MFA enablement, a support bridge line will be available to provide real-time support for users who need additional assistance. (Schedule is TBD)
- Targeted timeline:
  - Phase 1 counties Production Jan 21, 2022
  - Phase 2 counties Production Jan 28, 2022

## CalSAWS Procurement

## CalSAWS M&O Procurement

## Key Procurement Tasks

- Develop, Review and Finalize Requirements: July 2021 March 2022.
  - Develop Initial Baseline Requirements for Infrastructure and Maintenance and Enhancements (M&E): July – October.
  - Requirements Orientation and Pre-Work: October 18 31.
  - Conduct Requirements Review and Validation Sessions: November 2 – December 2.
  - Finalize Requirements: December 3 9.
  - Consortium and State Review of Requirements: December 10 –
     16.
  - Update Requirements and SOWs: December 17 21.
  - Vendor Community Review of Requirements, Statements of Work and Consortium Questions re: working in a multi-contractor environment: December 22, 2021 – January 21, 2022.
  - Analyze Vendor Input, Update and Finalize Requirements and SOWs, and Communicate Procurement Recommendations: January 24 – March 3.

## CalSAWS M&O Procurement

## Key Procurement Tasks

- Prepare Draft RFP: August 2021 March 2022.
  - Define and Confirm Objectives and Vision: August October.
  - Prepare Infrastructure and M&E Statements of Work (SOWs): September – December.
  - Define Firm Experience and Minimum Qualifications: September November.
  - Define Key Staff Position Descriptions and Minimum Qualifications: September – November.
  - Develop RACI Matrices: September January.
  - Define Evaluation Models, Criteria, and Understanding and Approach: August – December.
  - Develop Service Level Agreements (SLAs): December February.
  - Prepare Price Schedules and Instructions: December February.
  - Prepare Agreements: January March.
- State Review and Approval: March 17 April 28, 2022.
- Federal Review and Approval: May 5 July 12, 2022.
- Release RFP: July 19, 2022.
- Proposal Due Dates: October 31, 2022. Vendors may bid on Infrastructure and/or M&E components.

## Adjourn Meeting