2

Confirmation of Quorum, Agenda Review, and Protocols

Getting There Together!

Agenda

① Call Joint Meeting of Member Representatives and Board of Directors of the CalSAWS Consortium to Order

② Confirmation of Quorum, Agenda Review, Protocols

③ Public Comment

④ CalSAWS JPA Board Action Item - Approval to Meet Under Emergency Order

⑤ CalSAWS JPA Board Action Item - Consent Calendar

⑥ Member Representative Action Item – Approval of Administrative Budget for Unfunded Costs for FY 22/23

⑦ Member Representative Informational Items (Items 7-16)

⑰ June 2022 JPA Membership Meeting

⑱ Adjourn Meeting

C Public opportunity to speak on any Item NOT on the Agenda. Public comments are limited to no more than three minutes per speaker, except that a speaker using a translator shall be allowed up to six minutes.

D **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.

3 **Public Comment** →

The Power of 58

4 and 5

CalSAWS JPA Board Action Items

Getting There Together!

CalSAWS JPA Board 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 54953 through February 27, 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.

CalSAWS JPA Regions

Approval to Meet Under Emergency Order

Region	Board Member	Yay	Nay
State	Dan Kalamaras		
1	Kathy Gallagher		
1	Tracey Belton		
2	Rachel Roos		
3	Bekkie Emery		
4	Deborah Martinez		
4	Dena Murphy		
5	Gilbert Ramos		
5	Debra Baetz		
5	Melissa Livingston		
6	Michael Sylvester		
6	Roxana Molina		
6	Cynthia McCoy-Miller		

CalSAWS JPA Board Action Items
Action Items

5. Consent Items

   a. Approval of the Minutes and review of the Action Items from the December 17, 2021, CalSAWS JPA Board of Directors meeting.

   b. Approval of Accenture Change Notice 14, which includes requests for Accessibility Testing.

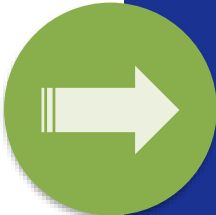   c. Approval of Gainwell Central Print Option to include Tulare Central Print Services.

CalSAWS JPA Regions

Approval of Consent Items

Region	Board Member	Yay	Nay
State	Dan Kalamaras		
1	Kathy Gallagher		
1	Tracey Belton		
2	Rachel Roos		
3	Bekkie Emery		
4	Deborah Martinez		
4	Dena Murphy		
5	Gilbert Ramos		
5	Debra Baetz		
5	Melissa Livingston		
6	Michael Sylvester		
6	Roxana Molina		
6	Cynthia McCoy-Miller		

6

CalSAWS Member Representative Action Items

Getting There Together!

Member Representatives Action Item
SFY 2022/23 – CalSAWS JPA Administrative Budget

CalSAWS JPA Member Administrative Costs	SFY 2022/2023
Insurance Services	$57,719
External Financial Audit	$35,386
SOC 1 Internal Audit Services	$83,413
San Bernardino ATC ("SB ATC") Accounting Services	$477,630
TOTAL	**$654,148**

The Admin budget was decreased by $67K from FY21/22 and is based on the following:

1. Insurance Services estimate based on actuals of FY 2021/22 budget plus 10%

2. Financial Statement & Single Audit Services, includes actual amount plus 5% contingency based on Eide Bailly contract.

3. SOC 1 Services, actual amount based on Davis Farr contract, plus 10%

4. SOC 2 Audit Services were moved to the CalSAWS IAPDU as a qualified cost

5. SB ATC projection based on standard hourly rate and estimated hours at 1,769 hours/year x $135 x 2 FTEs

Member Representatives Action Item
SFY 2022/23 – CalSAWS JPA Administrative Budget

Region	COUNTY	% Share of Persons Count 19/20	SHARE OF ADMINISTRATIVE COSTS BY COUNTY	Region	COUNTY	% Share of Persons Count 19/20	SHARE OF ADMINISTRATIVE COSTS BY COUNTY
1	Alameda	3.02%	$19,755	5	Orange	6.20%	$40,557
2	Alpine	0.00%	$0	2	Placer	0.44%	$2,878
2	Amador	0.06%	$392	3	Plumas	0.05%	$327
3	Butte	0.64%	$4,187	5	Riverside	6.48%	$42,389
2	Calaveras	0.10%	$654	2	Sacramento	4.43%	$28,979
3	Colusa	0.07%	$458	1	San Benito	0.13%	$850
1	Contra Costa	1.91%	$12,494	5	San Bernardino	7.18%	$46,968
3	Del Norte	0.10%	$654	5	San Diego	6.45%	$42,193
2	El Dorado	0.28%	$1,832	1	San Francisco	1.50%	$9,812
4	Fresno	4.19%	$27,409	4	San Joaquin	2.29%	$14,980
3	Glenn	0.10%	$654	4	San Luis Obispo	0.43%	$2,813
3	Humboldt	0.45%	$2,944	1	San Mateo	0.94%	$6,149
5	Imperial	0.80%	$5,233	5	Santa Barbara	1.10%	$7,196
4	Inyo	0.04%	$262	1	Santa Clara	2.75%	$17,989
4	Kern	3.43%	$22,437	1	Santa Cruz	0.58%	$3,794
4	Kings	0.51%	$3,336	3	Shasta	0.51%	$3,336
3	Lake	0.26%	$1,701	2	Sierra	0.01%	$65
3	Lassen	0.07%	$458	3	Siskiyou	0.15%	$981
6	Los Angeles	29.34%	$191,927	1	Solano	0.91%	$5,953
4	Madera	0.59%	$3,859	1	Sonoma	0.84%	$5,495
1	Marin	0.32%	$2,093	4	Stanislaus	1.86%	$12,167
4	Mariposa	0.04%	$262	2	Sutter	0.31%	$2,028
3	Mendocino	0.30%	$1,962	3	Tehama	0.21%	$1,374
4	Merced	1.11%	$7,261	3	Trinity	0.04%	$262
3	Modoc	0.03%	$196	4	Tulare	2.21%	$14,457
2	Mono	0.02%	$131	2	Tuolumne	0.11%	$720
1	Monterey	1.31%	$8,569	5	Ventura	1.69%	$11,055
1	Napa	0.22%	$1,439	2	Yolo	0.43%	$2,813
2	Nevada	0.19%	$1,243	2	Yuba	0.27%	$1,766
					TOTAL	**100.00%**	**$654,148**

Amounts per county are subject to change, based on 20/21 Persons Count
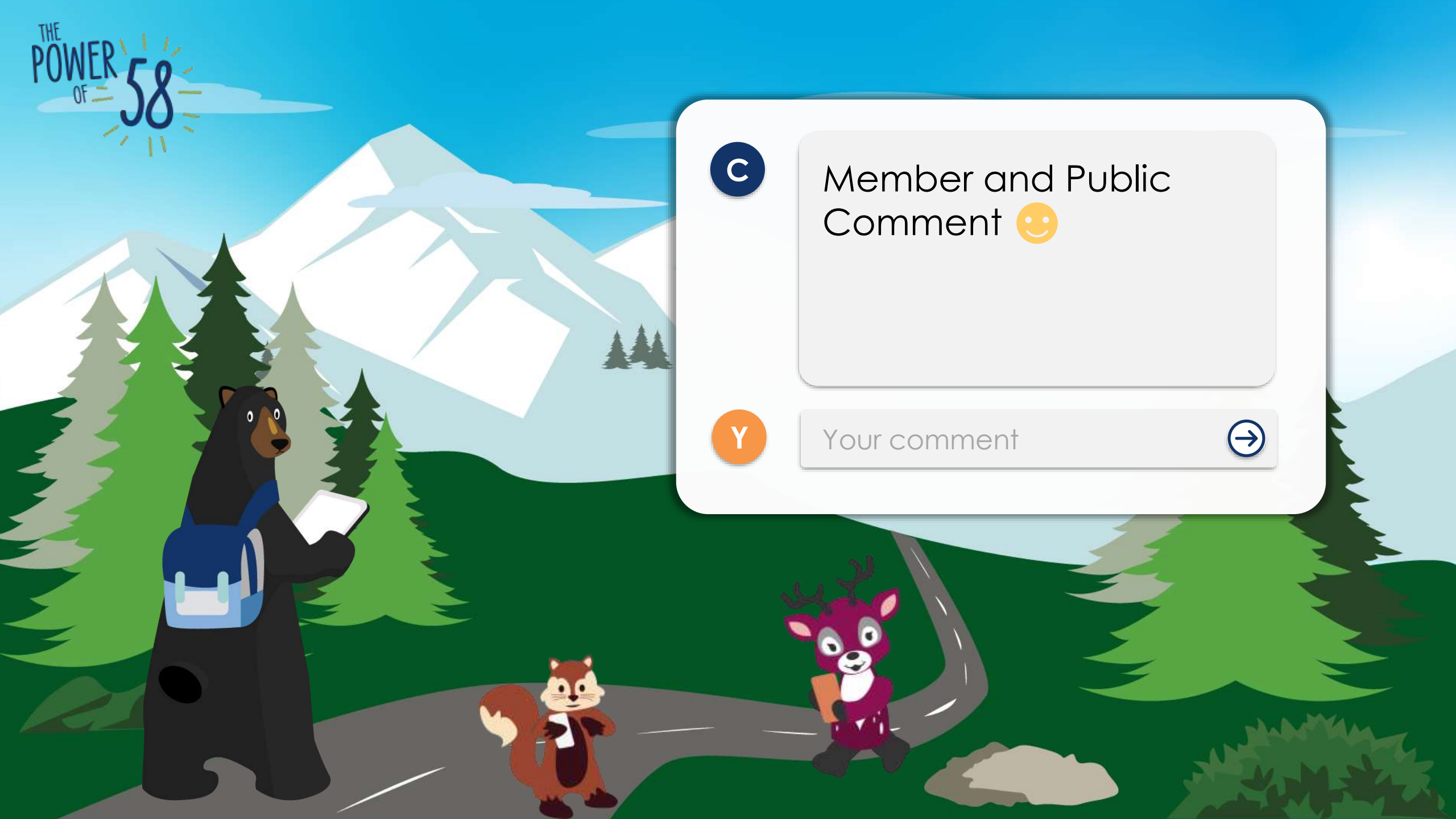
CalSAWS JPA Board Action Items
Action Items

6. Approval of the Administrative Budget for Unfunded Costs for FY 22/23.
   a. Review Administrative Budget Line Items

Cal**SAWS** Region 1

Approval of Administrative Budget

County/Director	Yay	Nay
Alameda Lori Cox		
Contra Costa Kathy Gallagher		
Marin Kari Beuerman		
Monterey Lori Medina		
Napa Jennifer Yasumoto		
San Benito Tracey Belton		
San Francisco Trent Rhorer		
San Mateo Ken Cole		
Santa Clara Angela Shing		
Santa Cruz Randy Morris		
Solano Marla Stuart		
Sonoma Angela Struckmann		

CalSAWS Region 2
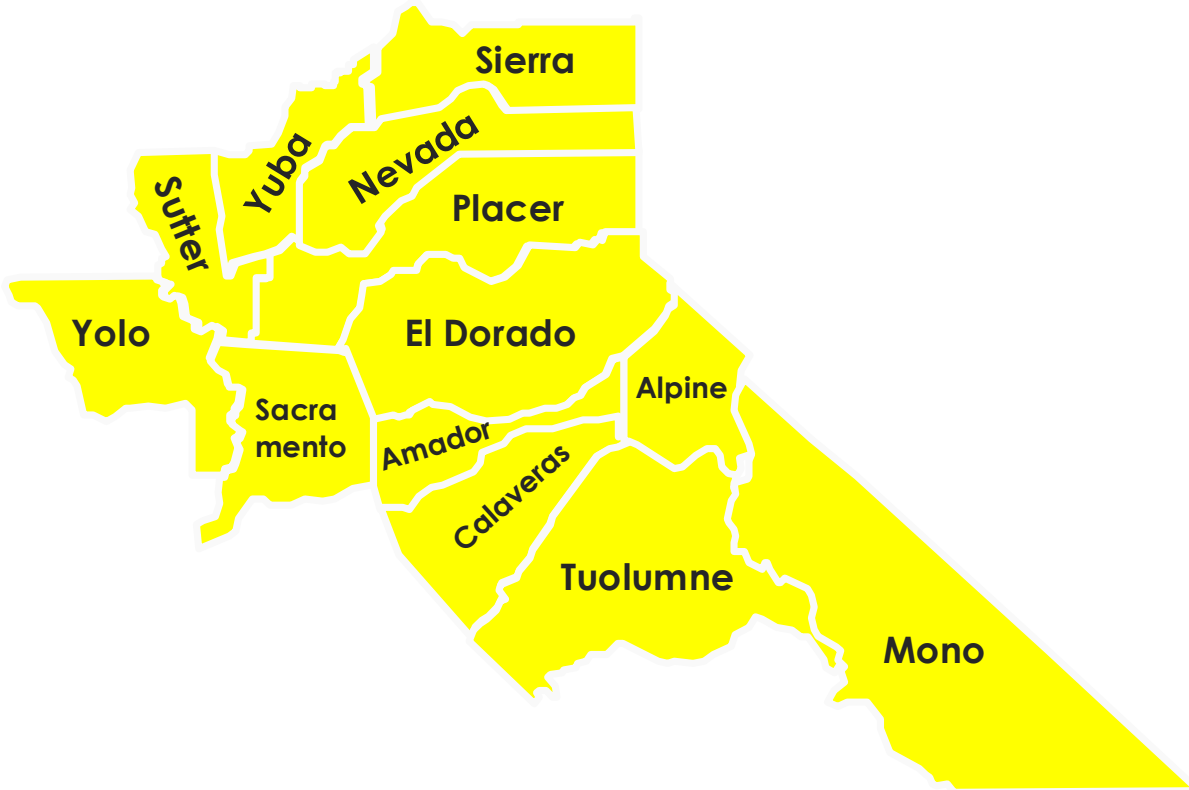
Approval of Administrative Budget

County/Director	Yay	Nay
Alpine Nichole Williamson		
Amador Anne Watts		
Calaveras Cori Allen		
El Dorado Don Semon		
Mono Kathy Peterson		
Nevada Rachel Roos		
Placer Greg Geisler		
Sacramento Ethan Dye		
Sierra Vickie Clark		
Sutter David Nagra		
Tuolumne Rebecca Espino		
Yolo Nolan Sullivan		
Yuba Jennifer Vasquez		

Cal**SAWS** Region 3
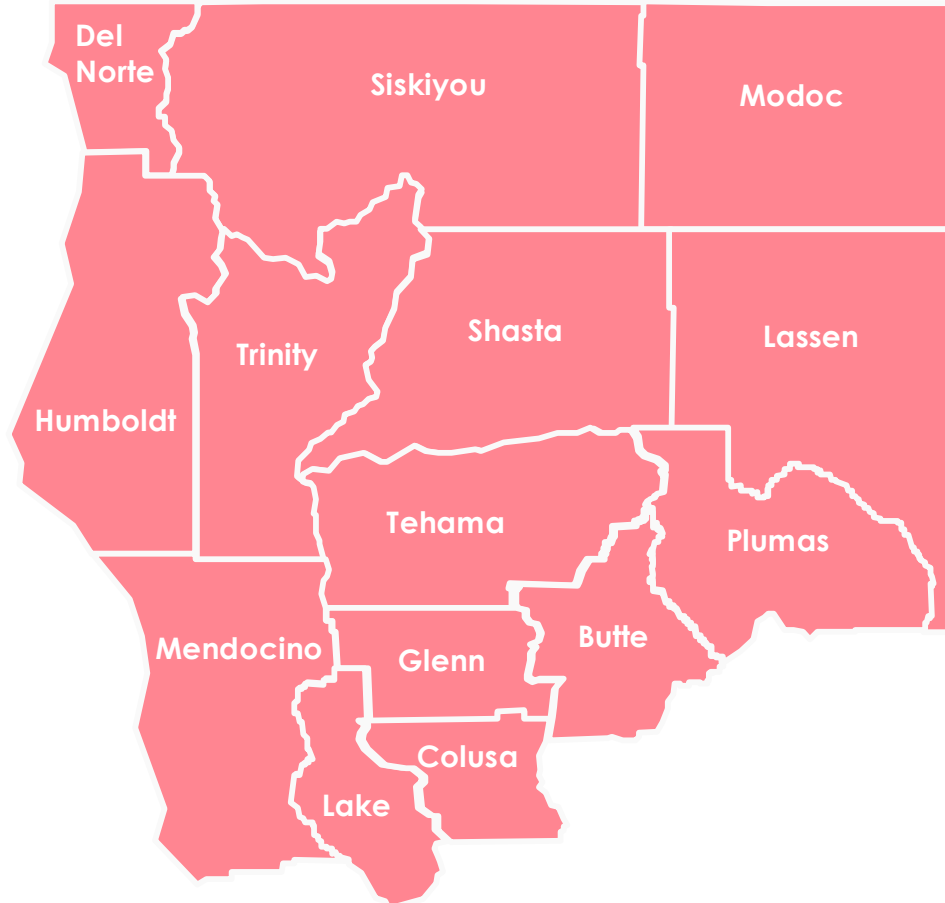
Approval of Administrative Budget

County/Director	Yay	Nay
Butte Shelby Boston		
Colusa Elizabeth Kelly		
Del Norte Heather Snow		
Glenn Bill Wathen		
Humboldt Connie Beck		
Lake Crystal Markytan		
Lassen Jenna Aguilera		
Mendocino Bekkie Emery		
Modoc Tom Sandage		
Plumas Neal Caiazzo		
Shasta Roxanne Burke		
Siskiyou Patricia Barbieri		
Tehama Laura Hawkins		
Trinity Liz Hamilton		

Cal**SAWS** Region 4
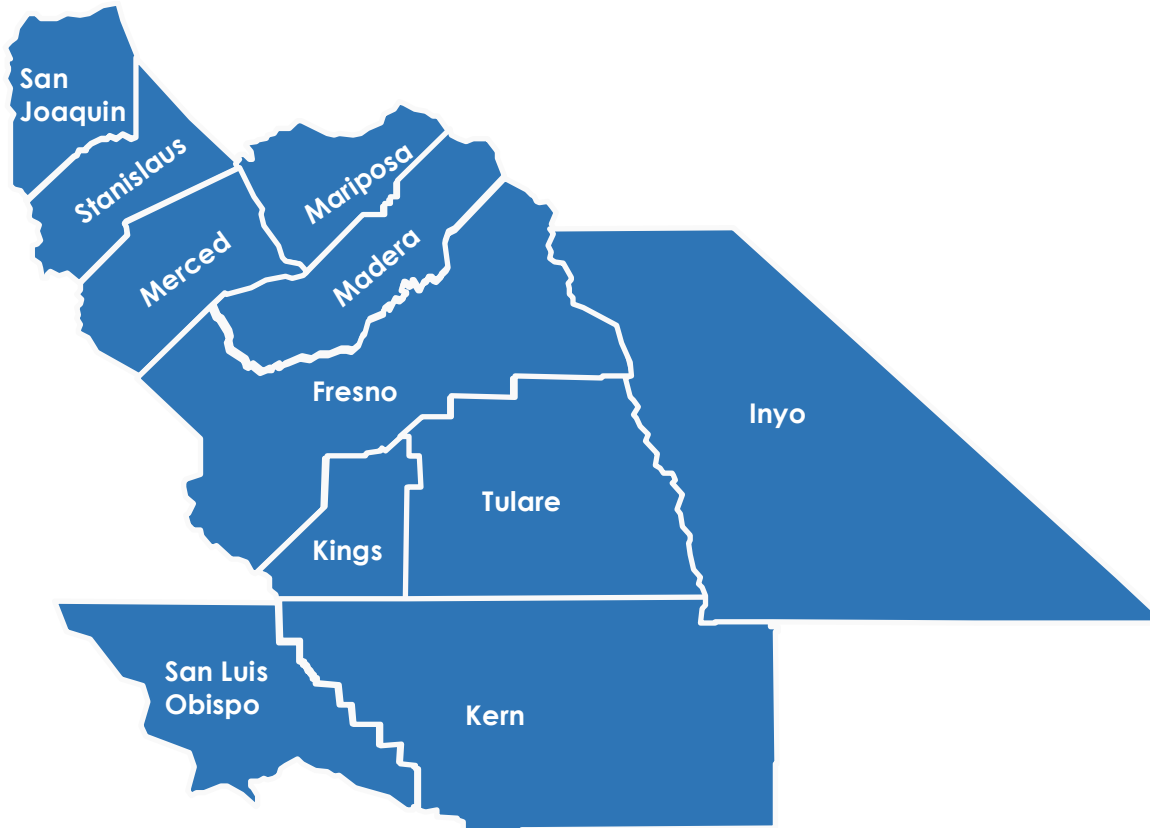
County/Director	Yay	Nay
Fresno Maria Aguirre		
Inyo Marilyn Mann		
Kern Dena Murphy		
Kings Sanja Bugay		
Madera Deborah Martinez		
Mariposa Shannon Gadd		
Merced Yvonnia Brown		
San Joaquin Chris Woods		
San Luis Obispo Devin Drake		
Stanislaus Amanda Sharp		
Tulare Anita Ortiz		

Cal**SAWS** Region 5

San Bernardino

Santa Barbara

Ventura

Orange

Riverside
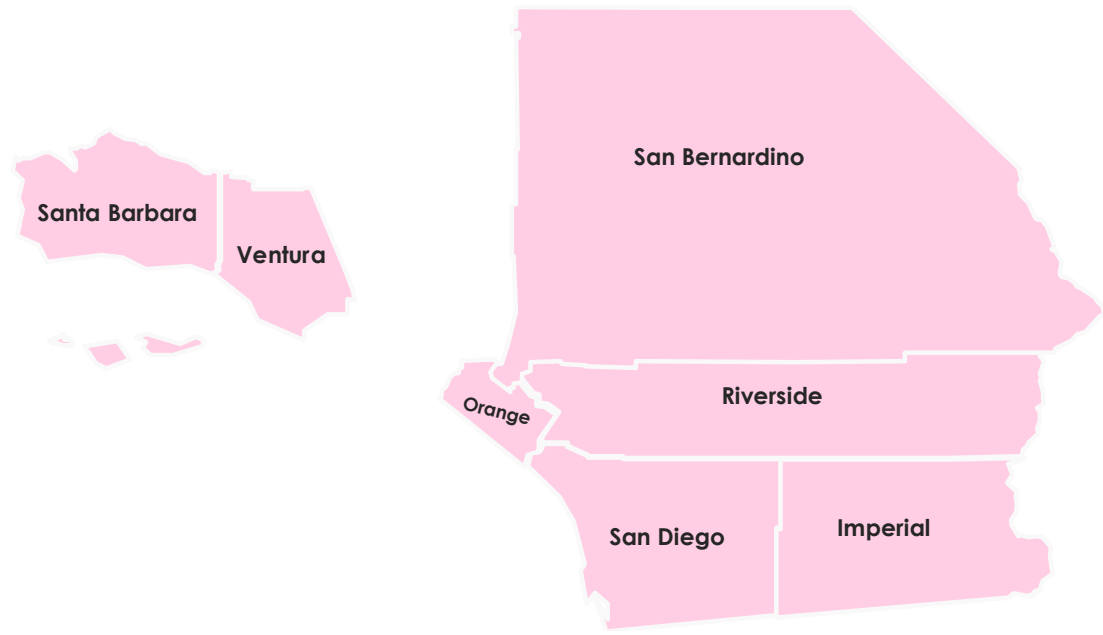
San Diego

Imperial

Approval of Administrative Budget

County/Director	Yay	Nay
Imperial Veronica Rodriguez		
Orange Debra Baetz		
Riverside Sayori Baldwin		
San Bernardino Gilbert Ramos		
San Diego Richard Wanne		
Santa Barbara Daniel Nielson		
Ventura Melissa Livingston		

Cal**SAWS** Region 6

Los Angeles

Approval of Administrative Budget

County/Director	Yay	Nay
Los Angeles Michael Sylvester		
Los Angeles Roxana Molina		
Los Angeles Cynthia McCoy-Miller		

CalSAWS Road Trip Information Center

Trip Overview
Length: 10 min

Destination: Rest Stop
Length: 45 min

POI: Shark Tank (Innovation)
Length: 5 min

Destination: Los Angeles
Length: 15 min

POI: BenefitsCal (Innovation)
Length: 5 min

Destination: Central Project
Length: 10 min

POI: Shark Tank 2 (Innovation)
Length: 5 min

Destination: 58 Counties
Length: 100 min

POI: SB BOTS Update
Length: 5 min

POI: Procurements Update
Length: 5 min

CalSAWS Conference
Length: 2 min

The Power of 58

Major Destinations
Points of Interest
Caution Messages

HOLLYWOOD

ROUTE 66

In **June 2021**, we traveled down the state.

Now, we're starting at a **Travel Rest Stop** in Southern California.

Destination: SoCal Travel Rest Stop

Budget

Security/ Fraud

Data Retention

Mapping POI

Checking the Vehicle

Snapshots

Cautions & Hazards

Planned Checkpoints

Member & Public Comments
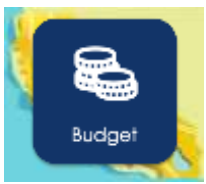
Travel Rest Stop
January Governor's Budget

- No issues were identified with the project budgets for CalSAWS, CalWIN, or CalACES

- One issue was identified with SB1341 premise funding for Budget Year (SFY 2022-23) and will require an update in the May Revise

- One premise item was not fully funded as expected for Elderly Simplified Application Project (ESAP) and will need to be addressed in the May Revise

- Other premise items were included as expected

- New premise funding added:

  - Reforming CalWORKs Aid to Pregnant Parents
  - New Required Notices and STAT 47 Report Modification
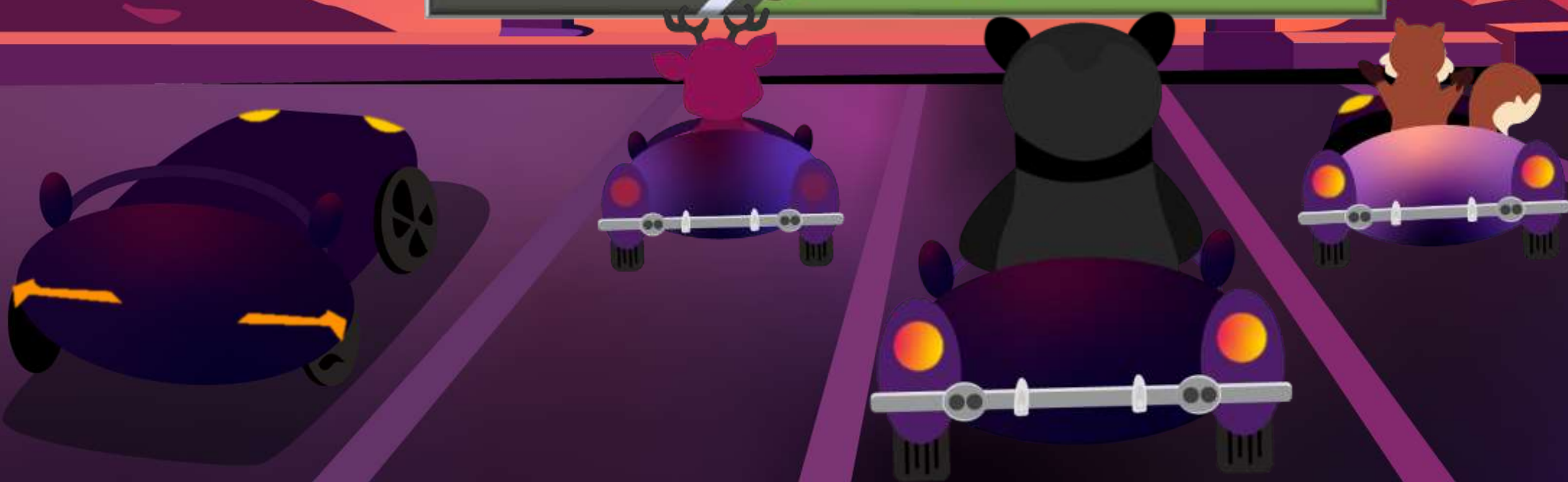
Data Retention: Proposed CalSAWS Execution Schedule

- **Deploying Functionality Built in C-IV to CalSAWS**
  - Follows approved data retention guidelines

- **CIT Coming Spring 2022**
  - Draft Schedule
  - Will include sufficient time for counties with Board of Supervisors approval requirements for data removal
  - Overview of Data Retention Process
  - County Actions
  - Reports Overview

- **Proposed Schedule**
  - Execute once in 2022 prior to first CalWIN Wave
  - Next execution would be after final CalWIN Wave
  - Ongoing execution of data retention process would then be on an annual basis
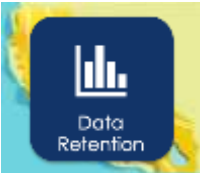
Travel Rest Stop
Data Retention: Case Data Removal Identification Report

- Monthly Report
- Contains one row for every program for Identified cases

Travel Rest Stop
Data Retention: Case Data Removal Override Report

- Monthly Report
- Contains one row for every program for Overridden cases

Data Retention: CalWIN Conversion Data Retention

- **What Data is Converted to CalSAWS?**
  - CalWIN will extract relevant data by using filters:
    - ✦ Data Retention Filters
      - ❑ Quarterly process in run in CalWIN which marks cases as to retention status, cases are not removed in CalWIN
      - ❑ "Not Retained" cases, will mostly be left behind (See Shell Cases)
    - ✦ Other Filters
      - ❑ Remove extra data, such as cancelled EDBC records

- **Shell Cases**
  - Will support mandatory timeclock information in alignment with CalSAWS

Travel Rest Stop
Snapshots from Our Trip: CalSAWS Highlights

- As per last month's update, active users and transaction volumes continue to be aligned with combined pre-go-live C-IV/LRS

- Core CalSAWS response times continue to be in line with Service Level Agreements with no outages December

- Imaging response levels continue to be in line with Service Level Agreements since early November

- Enhanced support for the C-IV Counties extended through mid-December

Travel Rest Stop
Snapshots from Our Trip: CalSAWS Highlights

12,189
CalSAWS Users
18,113
CalSAWS Users (excludes Weekend and Holidays)
(9/27/2021 – 1/5/2022)

Average Daily Users

$3.32B
Total Amount (All Programs)
11.4M
Total Number (All Programs)

Benefits Issued

3,258,558
by Batch
3,485,081
by Users

EDBCs Completed

11,385,281
Total Number of Correspondence Generated

Correspondence Generated

6,367,806
Transactions
9,457,633
Transactions (excludes Weekend)
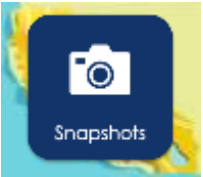(9/27/2021 – 1/5/2022)

Average Daily Transactions

589
Production Defects Resolved
115
System Enhancements Implemented

55 Priority Releases
(9/27/2021-1/4/2022)

Travel Rest Stop
Snapshots from Our Trip: CalSAWS Highlights

854K+
Programs processed as a result of Medi-Cal SSA, CAPI, and State Minimum Wage COLA effort executed in Production on 12/11/2021

SSA, CAPI, and State Minimum Wage COLA

$495M+
CalFresh Emergency Allotments issued for October and November 2021 impacting 1.5M Households across 40 Counties

CalFresh Emergency Allotments

$350K+
CalFresh Mass Replacement Benefits issued for October 2021 to Support Welfare Recipients on 4,200+ Households in 17 Counties due to Power Outages

CalFresh Mass Replacement Benefits

~57K
Hours of Effort

12th DD&I CalSAWS Release 21.11

26,792
Incidents

Incidents Closed/Resolved

100
Days and counting with no interruptions to CalSAWS application availability (9/27/2021 – 1/5/2022)

No Interruptions to CalSAWS Availability
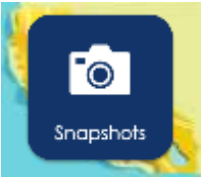
Travel Rest Stop
Snapshots from Our Trip: BenefitsCal

CalFresh Applications Submitted:
Q4 Comparison Year over Year
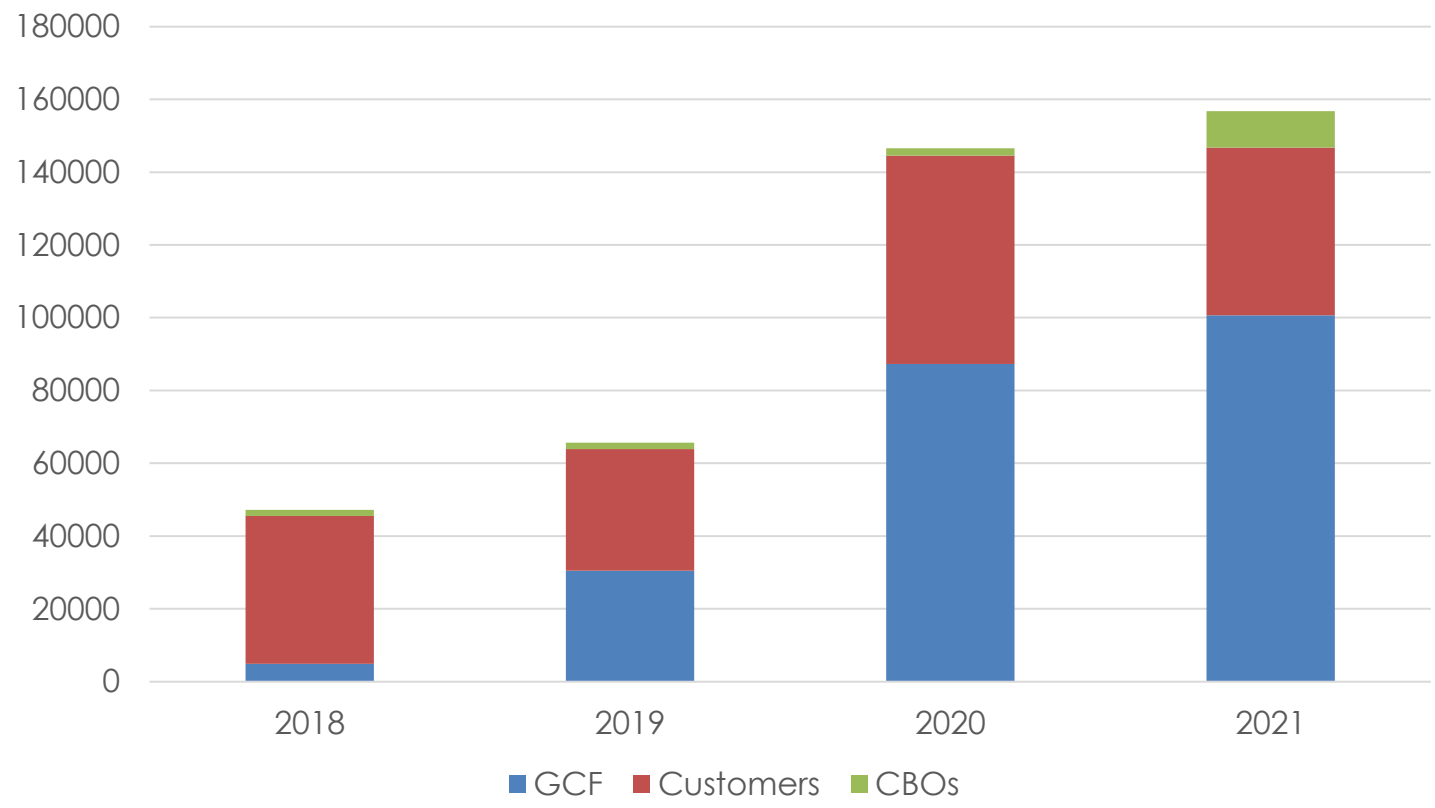
Chart compares CalFresh Application Submissions for Q4 2018, 2019, 2020, and 2021

- Applications increased from the prior year

- CBO-submitted applications increased 5x

Travel Rest Stop
Snapshots from Our Trip: BenefitsCal – **Voices of the users we serve**

Voices from the customers we serve…

Hear from a CBO partner…

Love the EBT access

Feeling powerful with BenefitsCal

The benefits of BenefitsCal...

Stock images used to protect the privacy of Customers and CBOs who participated.
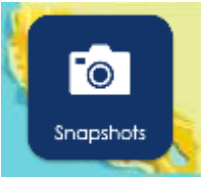
Travel Rest Stop
Snapshots from Our Trip: BenefitsCal - **More access channels than ever**

More access channels for support...

> **>76% of users access** from the palm of their hand

Empowering access anywhere

> **891 CBOs now have tools to help** customers online

CBO users grew 3x!

> **2.6MM sheets of paper saved**

Digital. Paperless.

> **100k apps** submitted by GetCalFresh

Submitted through BenefitsCal
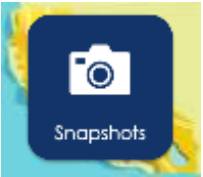
Travel Rest Stop
Snapshots from Our Trip: BenefitsCal – Optional/Configurable Features

Interview Nudge

GA/GR (Applications)

EBT/BIC Card Replacement

Click to Chat

Call Me Back

VITA Requests

Appointment Types

Announcements
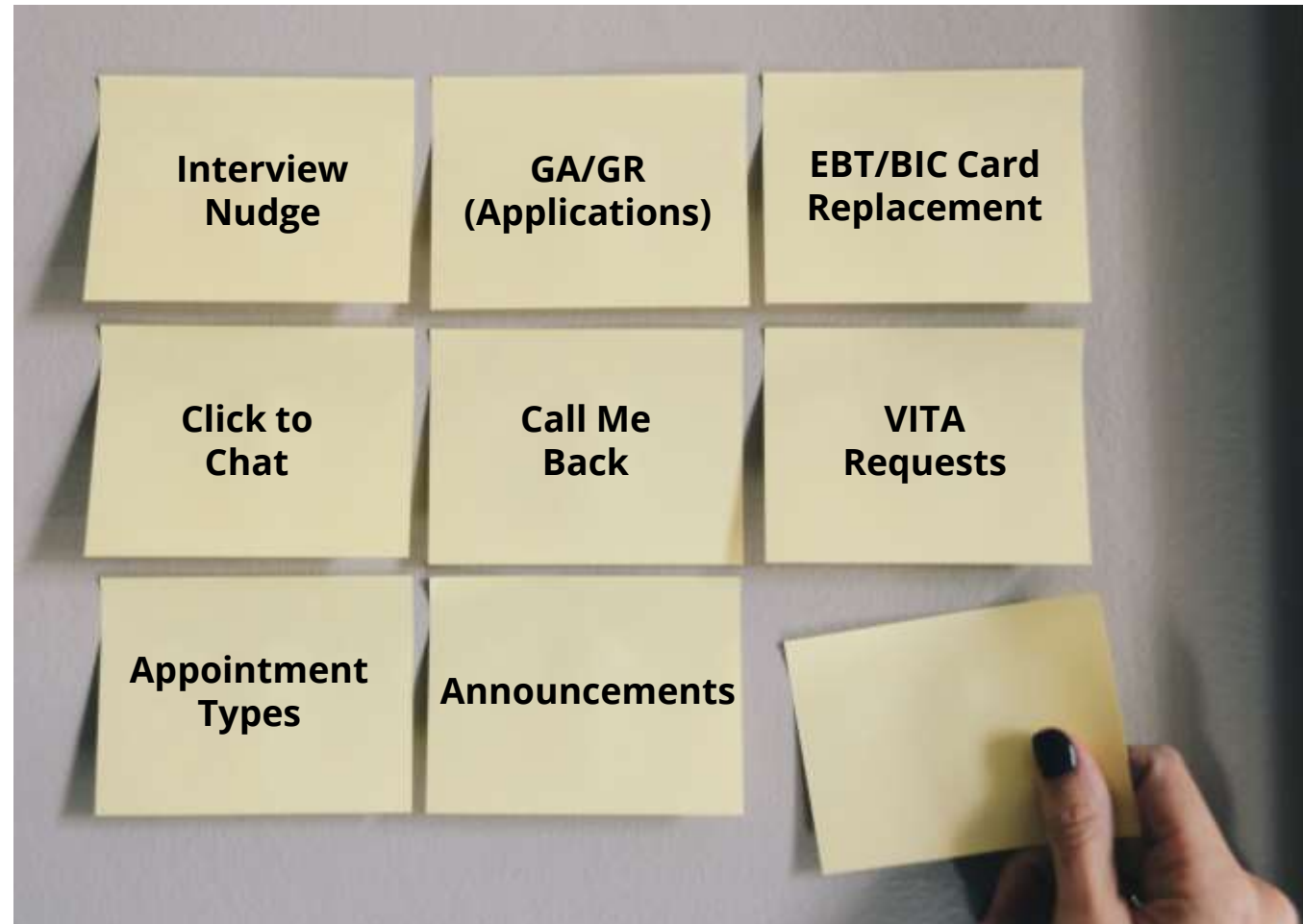
Travel Rest Stop
Checking the CalSAWS Vehicle

November 2021
Release 21.11

- ACL 20-115 - Increase Child Support Pass-Through and Disregard for CalWORKs Families
- Task management – expedited tasks, task upload, task export
- Salesforce integration (LA County)

January 2022
Release 22.01

- ACL 20-145, 20-146 Eliminate ESAP SAR 7 Requirement, Update ESAP NOAs and Run Batch
- MEDIL I 21-03 Update Delivery of Asset Verification Reports
- Pro-rate CF Minimum Allotment for CE/MCE Households

Travel Rest Stop
CalSAWS: Future Release Functionality and Policy

February 2022
Priority and 22.02 releases

- Run Batch EDBC for CalFresh SSA COLA effective 03/2022
- Expand access to Medi-Cal to all income eligible Californians, regardless of immigration status
- Post Partum Expansion - expand to 12 months

March 2022
Release 22.03

- ACL 20-113 / 20-120 - CW 60 MTC and WTW 24 MTC - CalWORKS time clock changes
- CalWORKS pregnancy special needs

April 2022
Priority releases

- Applicant EID batch run
- Pregnancy special needs batch run
- Integration with BenefitsCal Release 3.0
- FPL batch run (target)

May 2022
Release 22.05

- Increase asset limits for Non-MAGI programs
- ACL 21-109 Two Year OP/OI Establishment and Calculation Timeframe CalWORKs/CalFresh
- ACL 20-121 Establishment of a housing supplement for THP+NMD program

July 2022
Release 22.07

UNDER CONSTRUCTION

Travel Rest Stop
BenefitsCal: Future Release Functionality

Winter 2022   **Spring 2022**   **Summer 2022**

03/14/22 — R2.3

LA County Go-Live

04/25/22 — R3.0

- 9 New Languages
- Income Reporting Threshold
- Ad Hoc Reporting

06/22 — R3.1

Co-Browsing

07/25/22 — R4.0

- Timeclocks
- CalWORKs 2.0
- GROW
- Extension/Waiver Requests
- Support Requests
- Operational Reports
- Expanded chat
- CBO Add'l Features

Travel Rest Stop
Cautions / Hazards Ahead

CS	ID	Risk	Risk Level	Destination
	263	Converted Data Test (CDT) defects not resolved prior to CalWIN UAT start could impact the user experience for User Acceptance Test (UAT) participants	H	58 Counties
	256	Imaging scalability, performance degradation, and operational process risk may impact the go-live dates for upcoming counties	H	Los Angeles 58 Counties
	237	The scaling of Batch for 58 Counties may have an impact on system performance	H	Los Angeles 58 Counties
	268	Project Readiness for CalWIN cutover to CalSAWS	H	58 Counties
	262	The CalWIN counties may not be fully prepared for go-live if they do not have sufficient or timely information	M	58 Counties
	264	CalWIN County waves may not complete their Imaging migration readiness activities by their designated wave go-live dates	M	58 Counties
	267	GA/GR UAT and County Data Validation functionality may be delayed past May 2022	M	58 Counties
	269	CalWIN Counties may not have enough development and testing timeline to Refactor their Reports and Ancillary System before Go-Live	M	58 Counties

H High   M Medium

Travel Rest Stop
Planned Checkpoints and Gathering Points

Updates on the CalSAWS Consortium County Validation Process

MILE 1 — Statewide Framework

MILE 2 — Strike Team
- Membership
- Collaboration
- Iterative Approach

MILE 3 — Regional Model
- Flexibility
- Participation Options

MILE 4 — Next Steps
- Release 22.03
- Release 22.05
- Reflect and Evolve
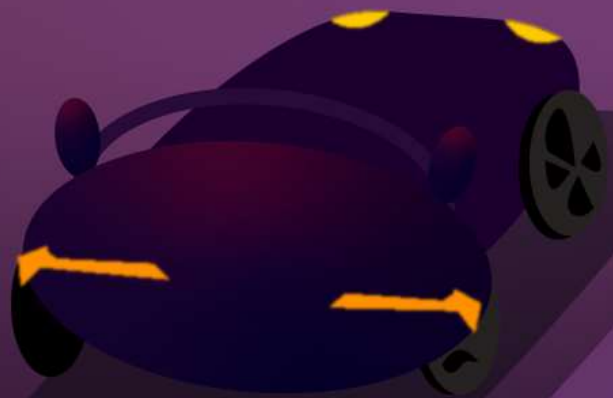
Why does BenefitsCal collaboration need to evolve?

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.

Collaboration Framework

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

Processes

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

Guiding Principles

Alignment on guiding principles and strategic objectives across stakeholders

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

Travel Rest Stop
Planned Checkpoints and Gathering Points

Updates on BenefitsCal Collaboration Process
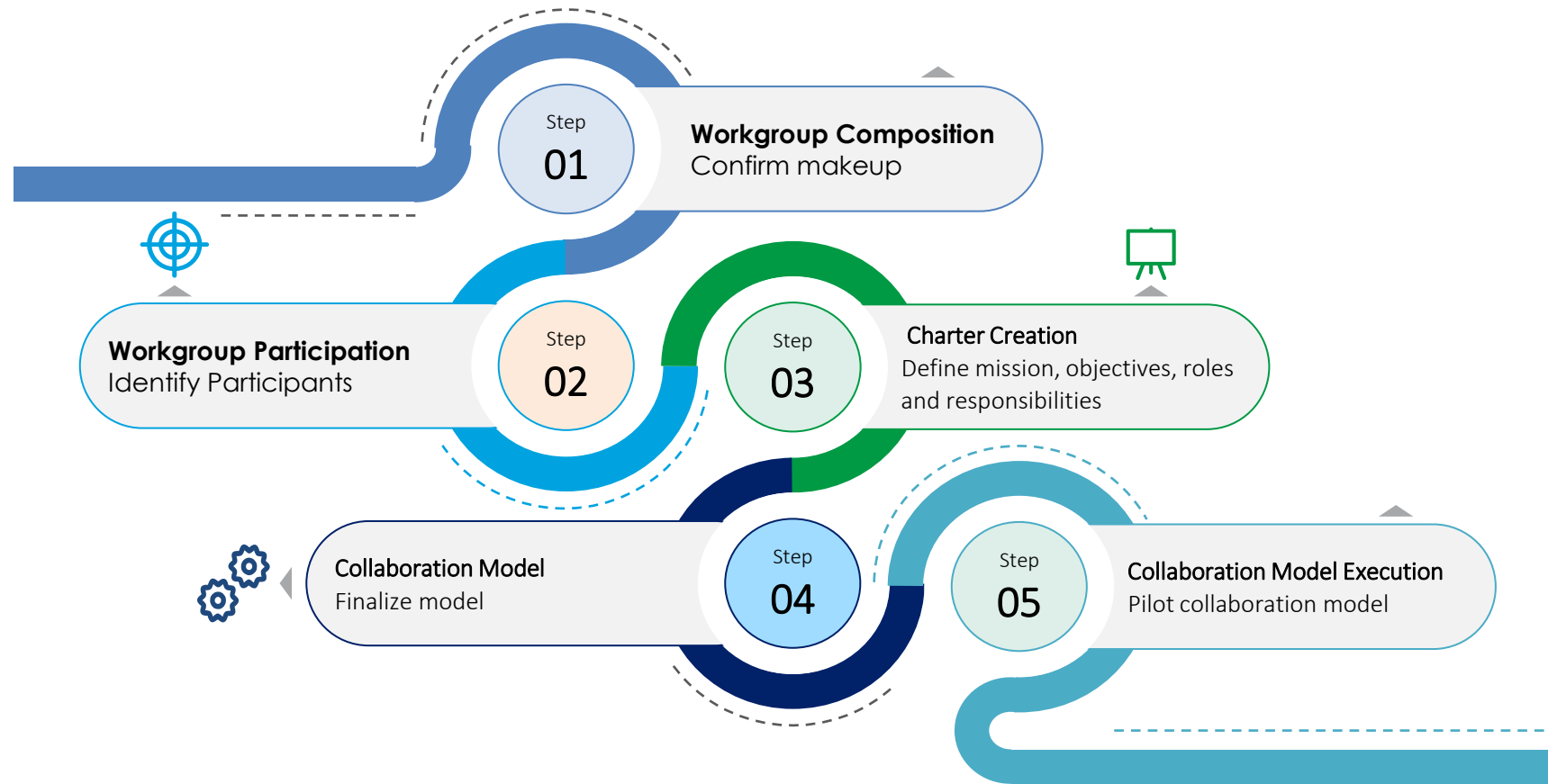
Step 01 — **Workgroup Composition** Confirm makeup

Step 02 — **Workgroup Participation** Identify Participants

Step 03 — **Charter Creation** Define mission, objectives, roles and responsibilities

Step 04 — **Collaboration Model** Finalize model

Step 05 — **Collaboration Model Execution** Pilot collaboration model

Welcome to
Los Angeles

Destination: Los Angeles

Overview

Imaging

BenefitsCal

Member & Public Comments
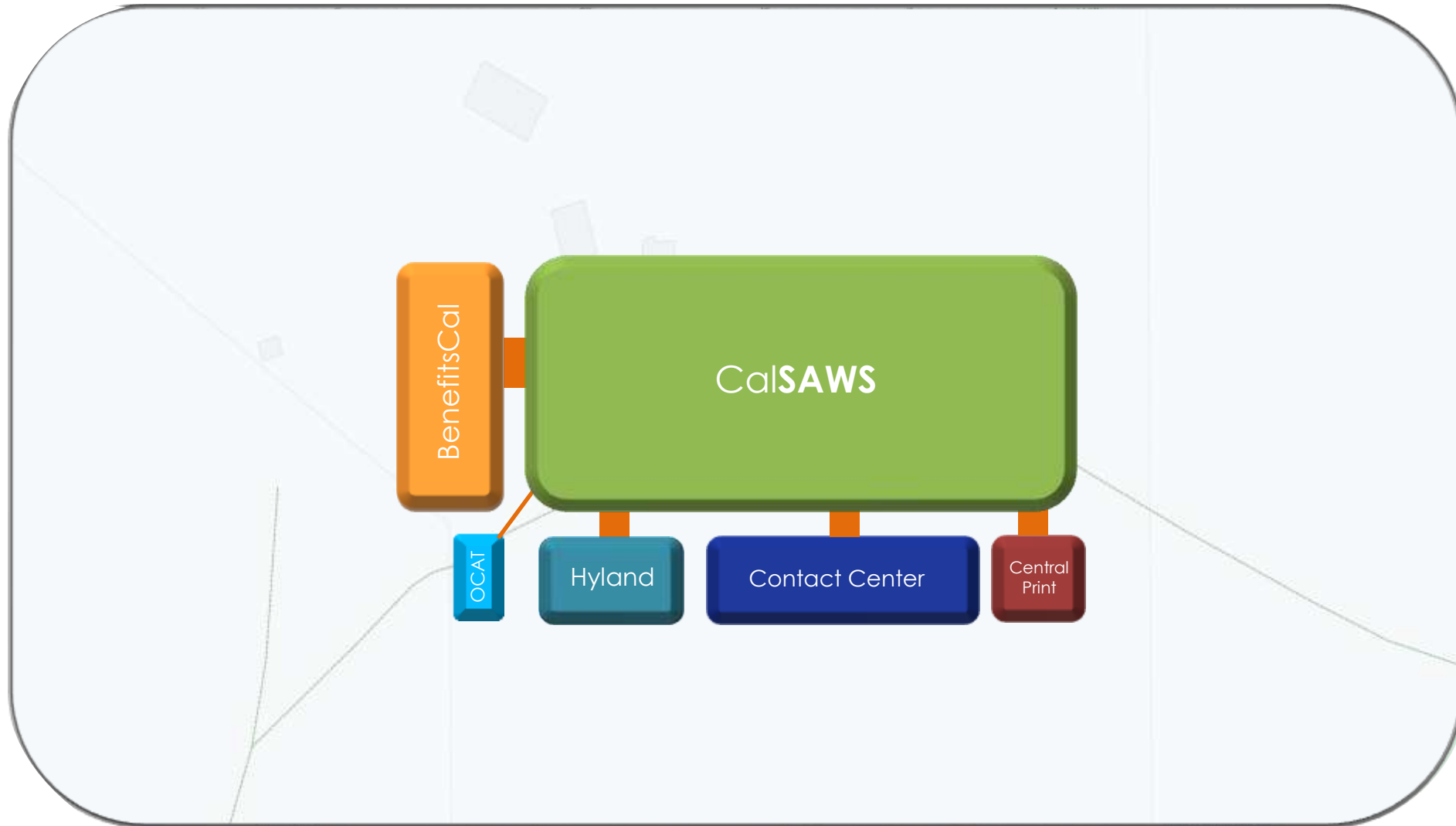
Ready for Phase 2

Readiness for LA County's Go Live includes...

- BenefitsCal
- Imaging
- End To End Testing
- Training
- Green Light
- Post Go Live Support
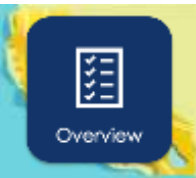
Destination: Los Angeles
Post Go-Live User Experience for 30 Counties

System Performance has been Stable and Reliable
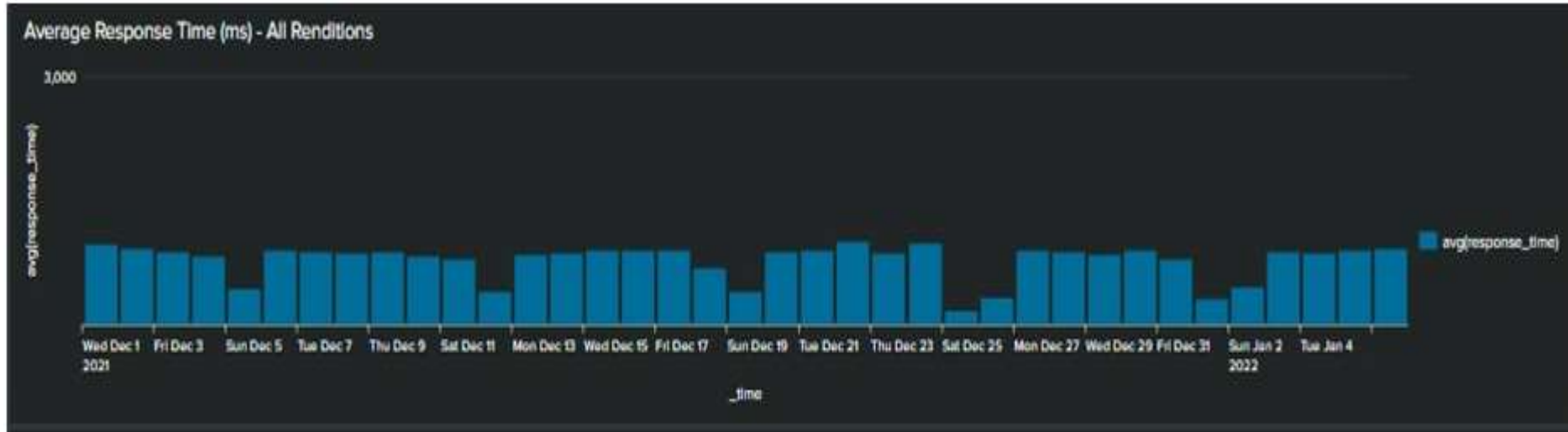
12/1 – 1/7; All Sizes 3,000 milliseconds = 3 seconds

Since Mid-October, we have maintained consistent performance with the average response times under 2 seconds on all sized documents

- Improved System Performance through continued tuning of the infrastructure
- Made numerous improvements to the end user experience by addressing latency issues and proactively updating the solution to enhance usability
- Continued ongoing focus on Brainware OCR accuracy will result in further reductions in images that are routed to the Exception queues
- Focus on enhancing Hyland Change Control process to eliminate unplanned image deletion and the associated restoration events

Destination: Los Angeles
LA County Imaging Go-Live Timeline

Current Proposed Los Angeles Go Live Plan
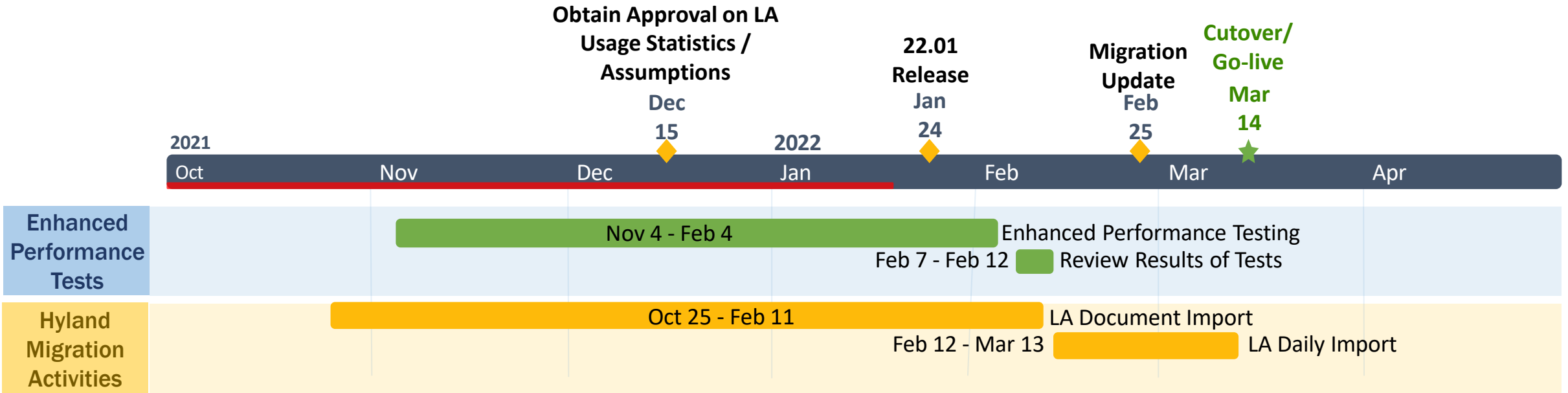
Obtain Approval on LA Usage Statistics / Assumptions
Dec 15

22.01 Release
Jan 24

Migration Update
Feb 25

Cutover/ Go-live
Mar 14

2021 Oct	Nov	Dec	2022 Jan	Feb	Mar	Apr

Enhanced Performance Tests
- Nov 4 - Feb 4 — Enhanced Performance Testing
- Feb 7 - Feb 12 — Review Results of Tests

Hyland Migration Activities
- Oct 25 - Feb 11 — LA Document Import
- Feb 12 - Mar 13 — LA Daily Import

Imaging scalability, performance degradation, and Operational Process risk may impact the go-live dates for upcoming counties

Destination: Los Angeles
LA County Go-Live Strategy Overview

CalSAWS and its partners are undergoing a holistic regimen to demonstrate the Hyland-managed AWS environment operates at peak performance.

Isolated   E2E

1	2	3	4	5
Hyland AWS Cloud Perf. Testing	**County Infrastructure Perf. Testing**	**Technical Arch Perf. Testing & BenefitsCal API Perf. Testing**	**Enhanced Perf. Testing**	**Model Office & UAT**
Complete	*Complete*	*Complete*	*In Process*	*In Process*
✓ Confirm Hyland environment is functional in isolation	✓ Validate county infrastructure & core app are configured and scaled to handle peak PROD workloads	✓ Validate interfaces between Hyland, BenefitsCal, and other entities	✓ Confirm end-to-end functionality simulating peak load during peak hours across CalSAWS and BenefitsCal application	✓ Execute real-world business processes and refine understanding of system just prior to go-live

Destination: Los Angeles
Improvements in Exception Queue Processing

CalSAWS October Processing

~3.2M Total Captured Documents

- Document Intake → OCR: 66% of all docs, 2.1M docs
- 34% of OCR docs, 1.1M docs automatically indexed (Document Intake → Archived)
- OCR → Exception Queues (Manual): 42% of OCR docs, 900K docs
- 58% of OCR docs, 1.2M docs automatically indexed (OCR → Archived)
- Exception Queues (Manual) → Archived
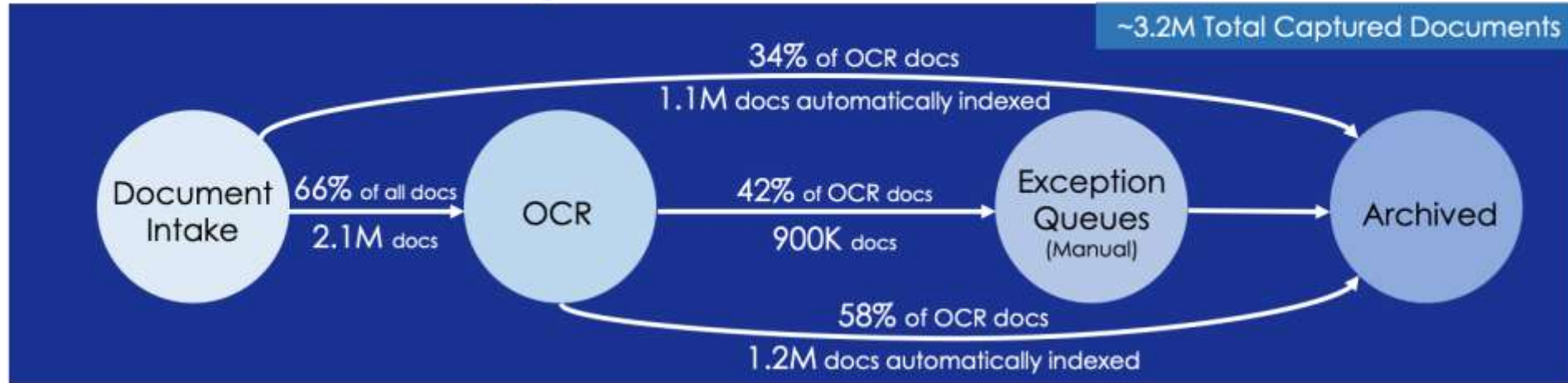
CalSAWS December Processing

~1.7M Total Captured Documents

- Document Intake → OCR: 50% of all docs, 850K docs
- 50% of OCR docs, 870K docs automatically indexed (Document Intake → Archived)
- OCR → Exception Queues (Manual): 48% of OCR docs, 420K docs
- 52% of OCR docs, 440K docs automatically indexed (OCR → Archived)
- Exception Queues (Manual) → Archived
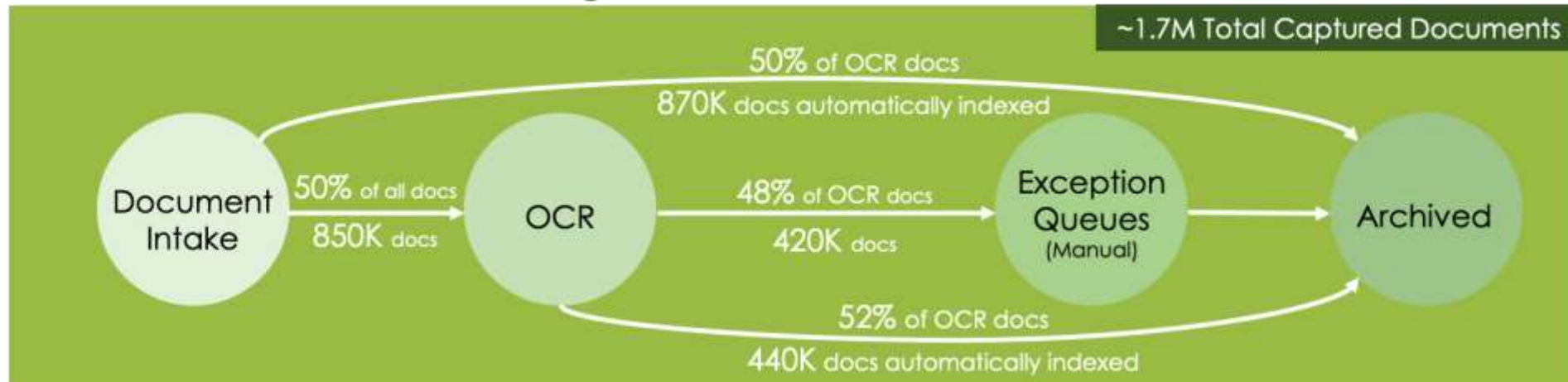
Destination: Los Angeles
Imaging Training: Web-Based Training Modules (WBTs)

Imaging WBTs were made available via the CalSAWS LMS starting September 27, 2021, for Early Training and ITTSME participants

Materials have been updated with learnings from the C-IV Go-live

General Training for all County staff will start on February 14, 2022

WBT Module	Lessons	Est. Duration	Interactive
Navigation	• Accessing Imaging Functionality • Perceptive Experience User Interface	• 20 min	
Overview	• Scan Modes • Queues • Drawers • Imaging Annotations • Images & Tasks • Coversheets & Separator Sheets	• 30 min	
Single Case Capture	• Single Case Capture • Ignore Barcode Scan Mode	• 30 min	X
Multi-Case Capture	• Multi-Case Capture	• 40 min	X
Virtual Printer Capture and Import	• Virtual Printer Capture • File Upload Mode	• 30 min	X
Document Retrieval	• Searching Process, Searching Options & View Rights	• 30 min	X
County-Maintained Workflow Queues	• Exception Routing • Non-Standard Processes • Other County Documents	• 40 min	X
Return Mail Capture	• Return Mail Capture	• 30 min	X
Specialty Scan Modes	• SIU, Hearings & RDB Scan modes • Other County Departments Scan Mode	• 50 min	X

Destination: Los Angeles
Imaging Training: Imaging Train-the-SME (ITTSME) Refresher

The **ITTSME sessions** completed in October 2021 prepared LA County resources to be Subject Matter Experts on the CalSAWS Imaging Solution

The Project will offer **ITTSME Refresher sessions** in February 2022

Key Details

Purpose:
Deepen participants' understanding of the CalSAWS Imaging Solution and Imaging training materials via a 3-hour demo and a 3-hour hands-on practice session

Target Audience:
- County-identified Imaging SMEs
- County Trainers, Supervisors & Super Users
- Staff identified for post-deployment office-level support

Prerequisites:
- Imaging WBTs (required)
- Imaging Guides (recommended)

Content:
- Imaging functional demonstrations
- Hands-On Practice
- Facilitated Q&A
- Information on Training & Implementation Support

Logistics - Demos

Platform: Microsoft Teams

Timing: February 9, 2022
9:00 AM – 12:00 PM
and
1:30 – 4:30 PM

*A selected ITTSME Refresher Demo recording will be uploaded to the CalSAWS LMS under the Imaging Curriculum

Logistics – Hands-On

Platform: Microsoft Teams

Timing: Feb 10 – Feb 24, 2022
Various times

Participants will attend **one** Demo and **one** Hands-On Practice session. **CRFI 022-XXX Request for ITTSME Refresher Participants** will provide additional details.

Destination: Los Angeles
Imaging Training - Additional Training Materials

1 CalSAWS Imaging Guides

Based on WBT Content

- Annotations
- Core Capture Profiles
- County-Maintained Workflow Queues
- Coversheets and Separator Sheets
- Document Retrieval
- Images and Tasks
- Imaging Navigation
- Quality Assurance
- Return Mail Capture
- Specialty Capture Profiles

2 CalSAWS Fact Sheets

- Imaging
- Imaging Search Results
- Imaging Workflow Queues

3 CalSAWS Imaging Videos

Upcoming

- Searching
- Workflow Queue Processing
- 10-15 Additional Videos (Topics TBD)

Overall BenefitsCal Readiness for LA Go-Live
Readiness Areas and Categories

Area	Category	WE 01/21/22	WE 01/14/22
Application	County Validation – Execution	35%	Begins 01/18/22
	County Validation – Pass Rate	93%	Begins 01/18/22
Integration	Interface Partner Test	100%	100%
Technical	Infrastructure	100%	100%
	Security Testing	20%	20%
	Performance Testing	15%	15%
Conversion	CBO Conversion Readiness	100%	100%
	CBO Converted Data Test	NS	NS
Training	Training Plan	100%	100%
	Training Materials	40%	40%
	Training Delivery	10%	10%
Implementation	Prod Deployment Plans	25%	25%
Change	Communications	20%	20%
	Partner Readiness (County, etc.)	20%	20%

NS	Not Started	G	On Schedule	Y	<14 Days Late	R	>=14 Days Late	C	Complete

Destination: Los Angeles
BenefitsCal – Ready to Go!

Date	Milestone
01/18/22 to 02/11/22	End to End Testing
02/01/22 02/02/22	Training: County Staff + Tier 1
02/07/22	Training: ForgeRock CBO Access
02/23/22	Training: CBO Awareness Webinar
02/15/22 03/07/22	SMS Messages Mobile App Push Notifications Email Notifications
03/07/22	Green Light "Go"
03/14/22	**Go-Live**

Destination: Los Angeles
BenefitsCal – What's new as we move beyond YBN…

- CBO Access Requests **are online** (steps in ForgeRock)

- All Customer + CBO accounts **require an email address**

- Customers can **report changes** online (and on 04/25/22, will include nudges for Income Reporting Threshold)

- **One-Way Messaging** is available (two-way coming 07/22)

Destination: Los Angeles
What Staff Need to Know

1. End to End (e2e) testing is in progress (BenefitsCal to CalSAWS)

2. March 14 is go-live

3. Customers will need to create a new account in BenefitsCal starting March 14

4. Email address is required to create a BenefitsCal account

5. Take trainings early – and play in the test environment!

BenefitsCal: Statewide Rollout Continues
A flexible, repeatable framework is available for future CalWIN counties

A repeatable framework for BenefitsCal …

- A **standard workplan** is available with readiness tasks

- A package of **training and communication** materials is available for customization

- **Ongoing updates:** Lessons learned from the C-IV and upcoming YBN cutover will be included within the materials

Point of Interest: Continuous Innovation – What's Coming Soon for BenefitsCal

Innovation Point of Interest
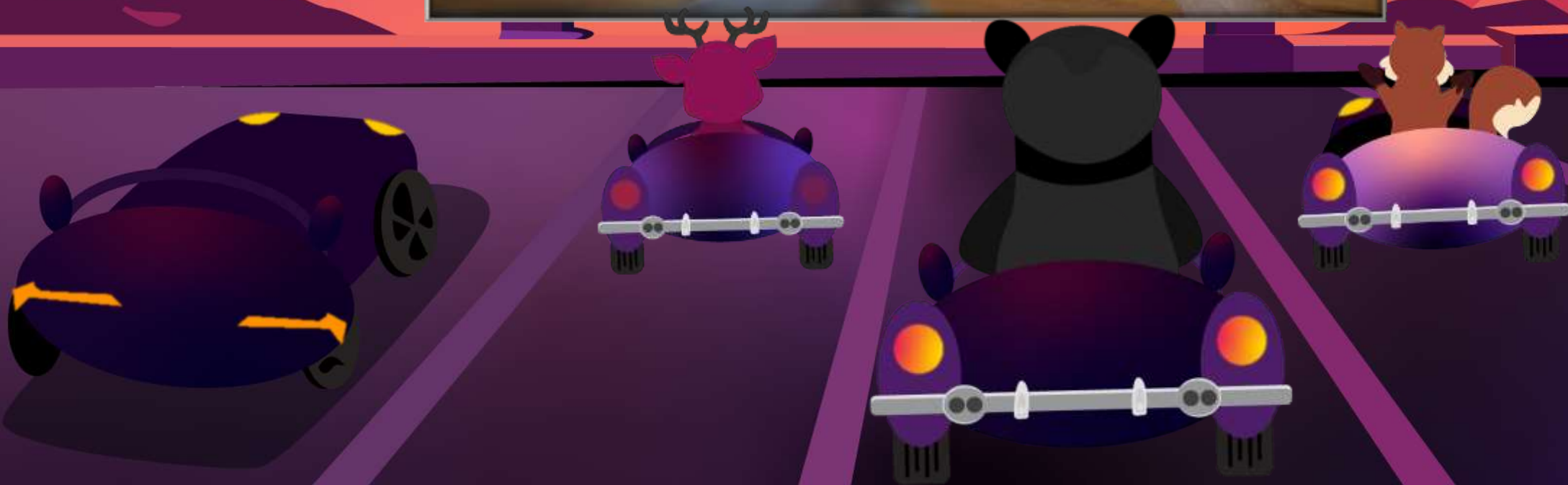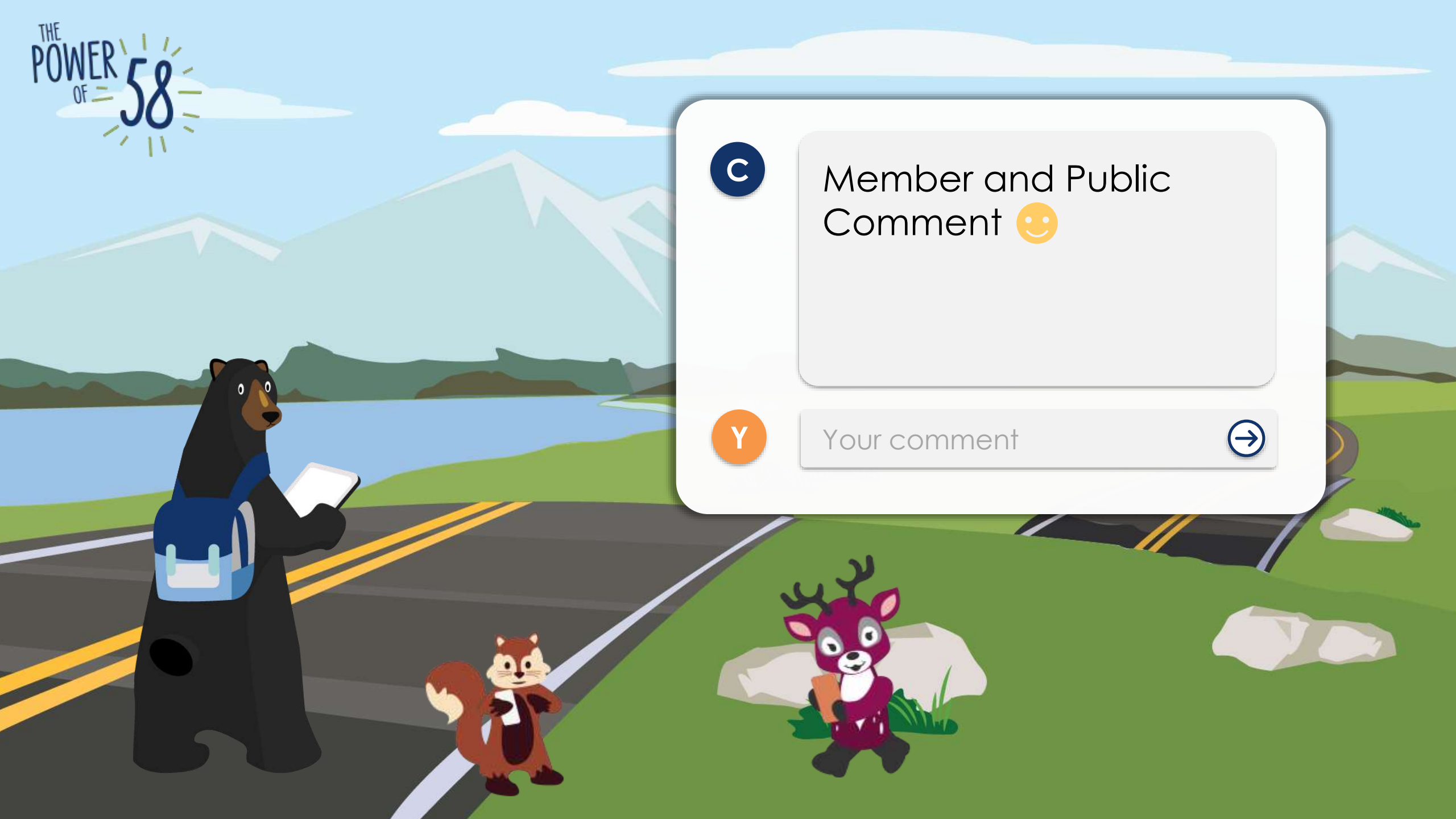
Member & Public Comments

Welcome to
Central Project

Destination: Central Project

IDEA Update → Cultural Transformation → Member & Public Comments →

Where We Are Going: IDEA
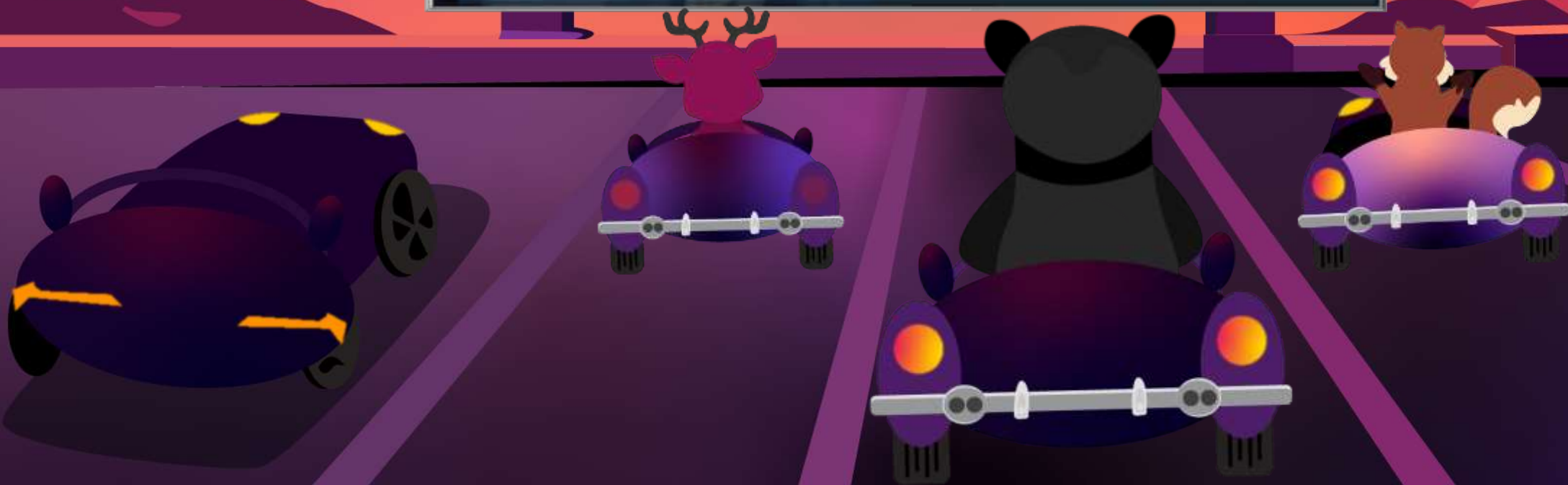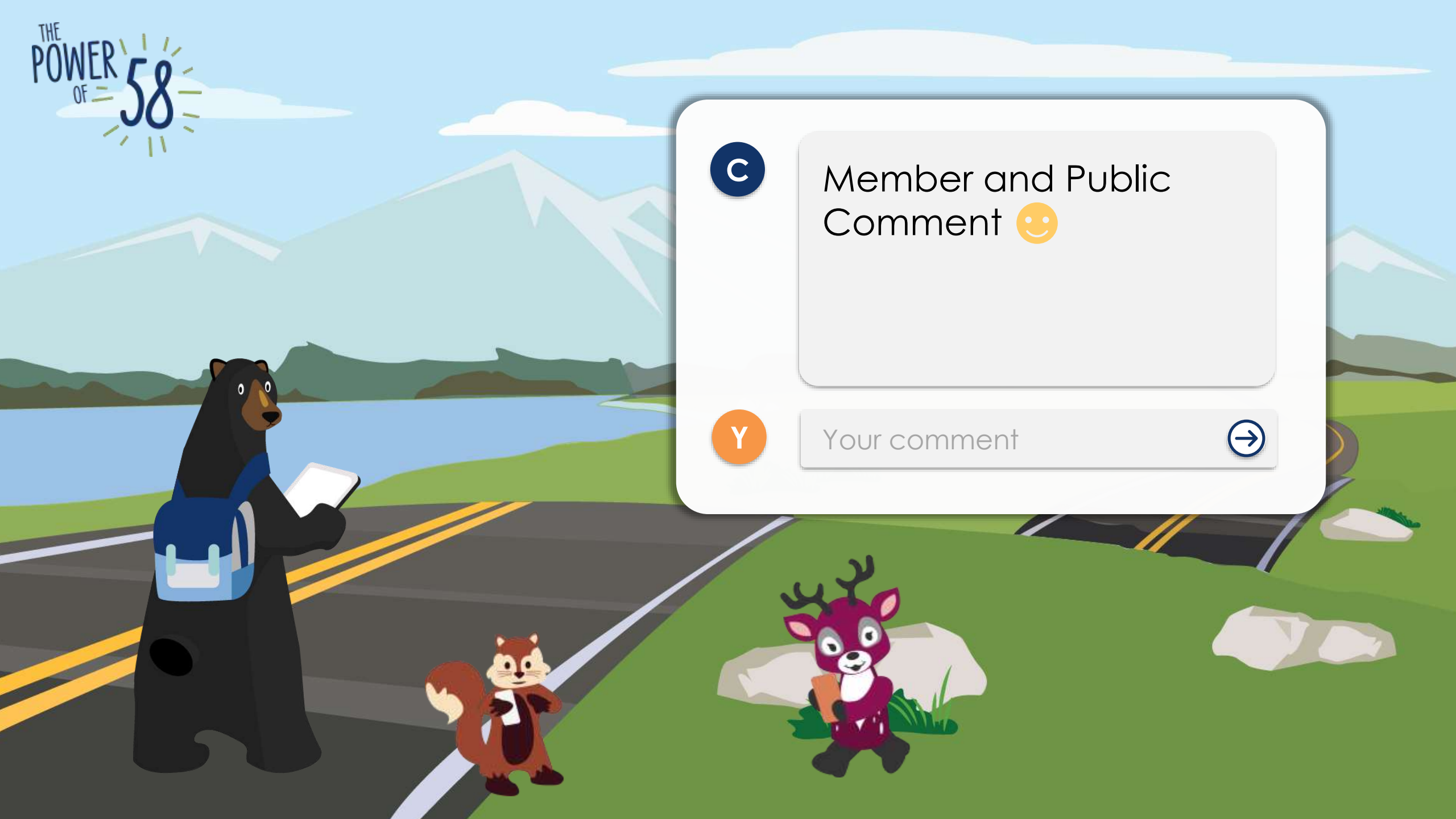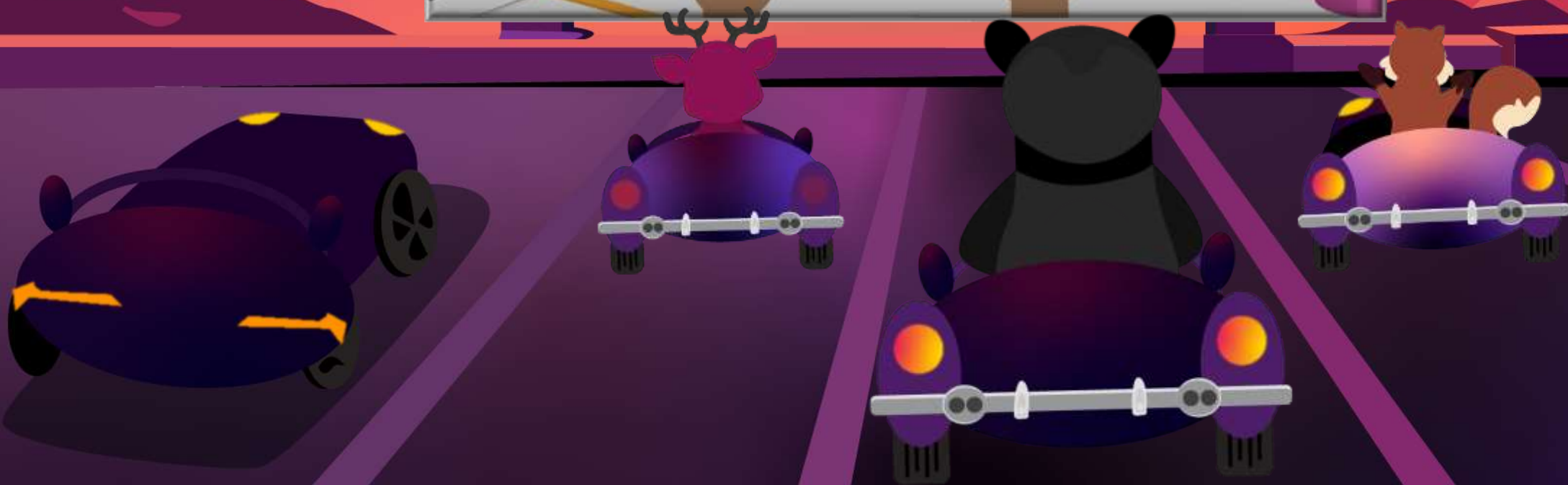
CalSAWS

Point of Interest: Shark Tank 2

Innovation Point of Interest → **Member & Public Comments** →

CalSAWS Innovation
Shark Tank 2
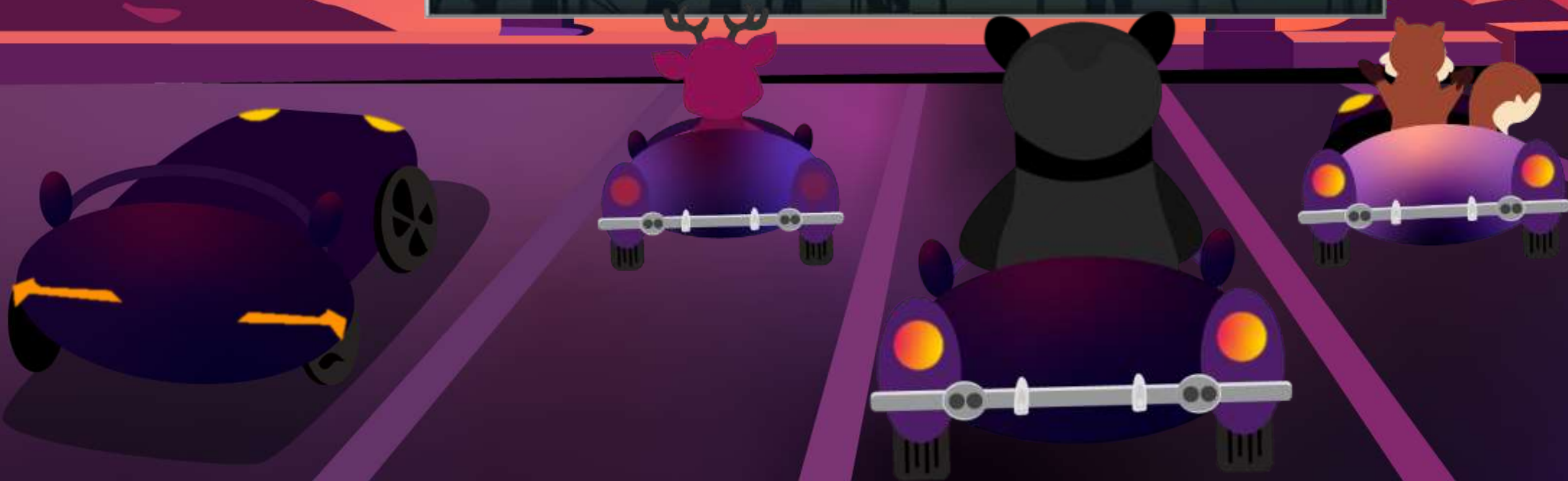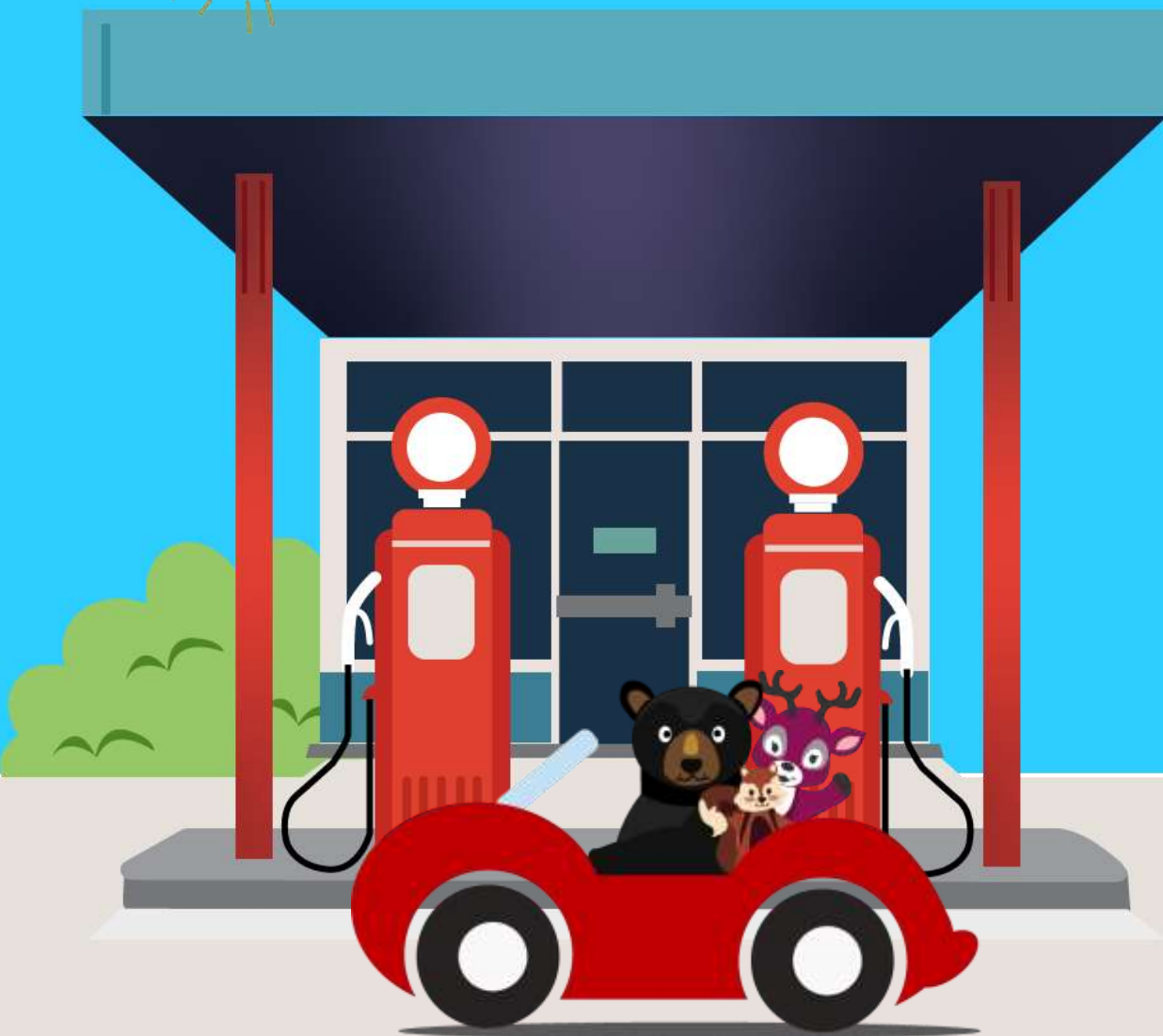
THE POWER OF 58

PIT STOP

Cali, Clara, and Diego have stopped to get snacks. We'll get on the road again in

10 minutes

Welcome to The Great 58 Counties

Destination: 58 Counties
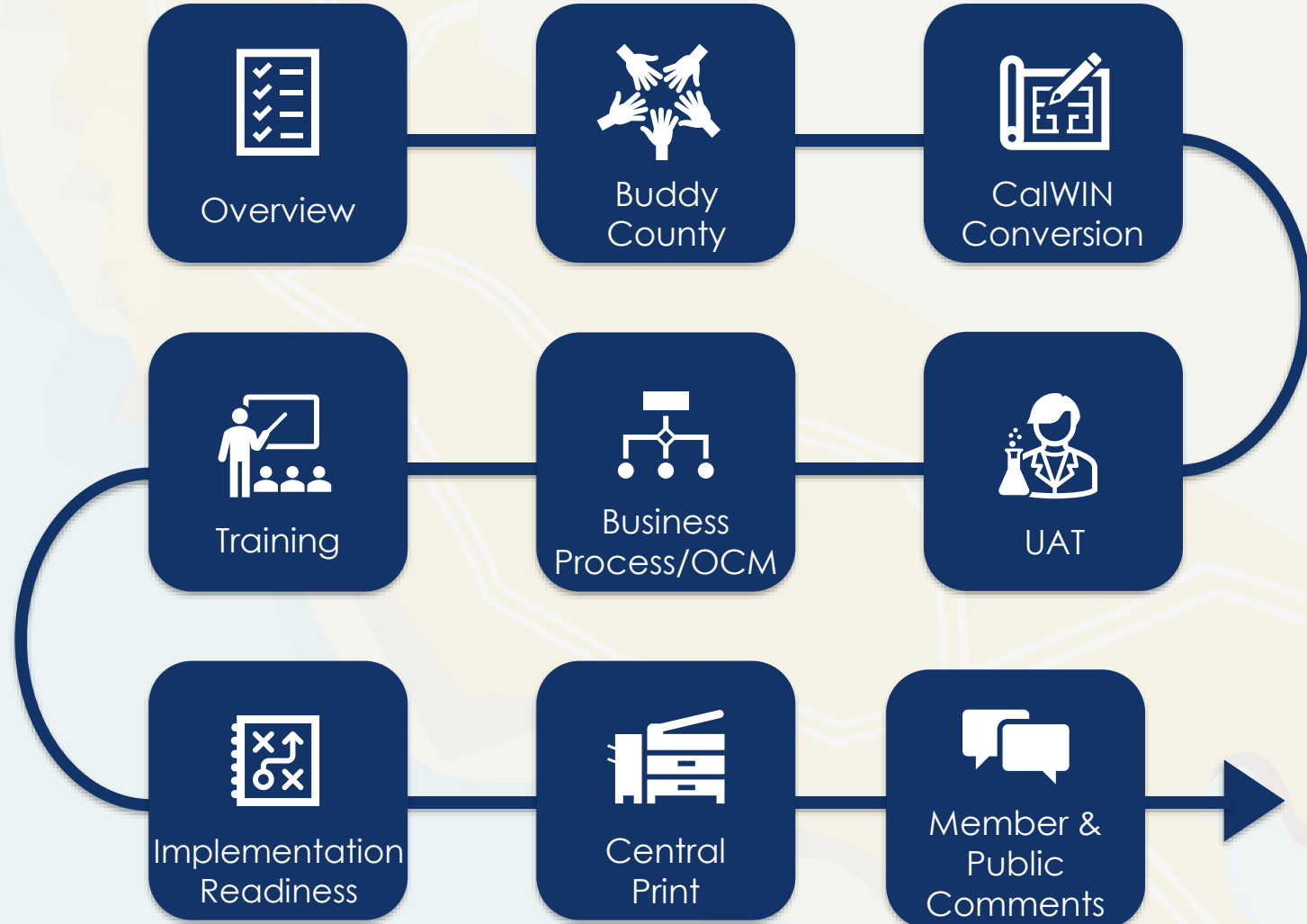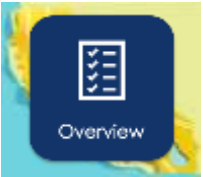
Destination: 58 Counties
Navigating Your Way from CalWIN to CalSAWS – We Hear You!

Overview

Do I have enough time to get my APIs ready?

When can I test reports with my county's data?

How will my task configuration be established?

What will we test in UAT?

What lessons are we applying to CalWIN from C-IV's migration?

When will my security roles be mapped?
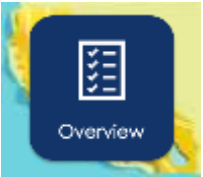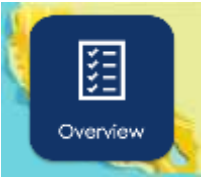
Destination: 58 Counties
CalWIN Strategy Overview: Validation Areas
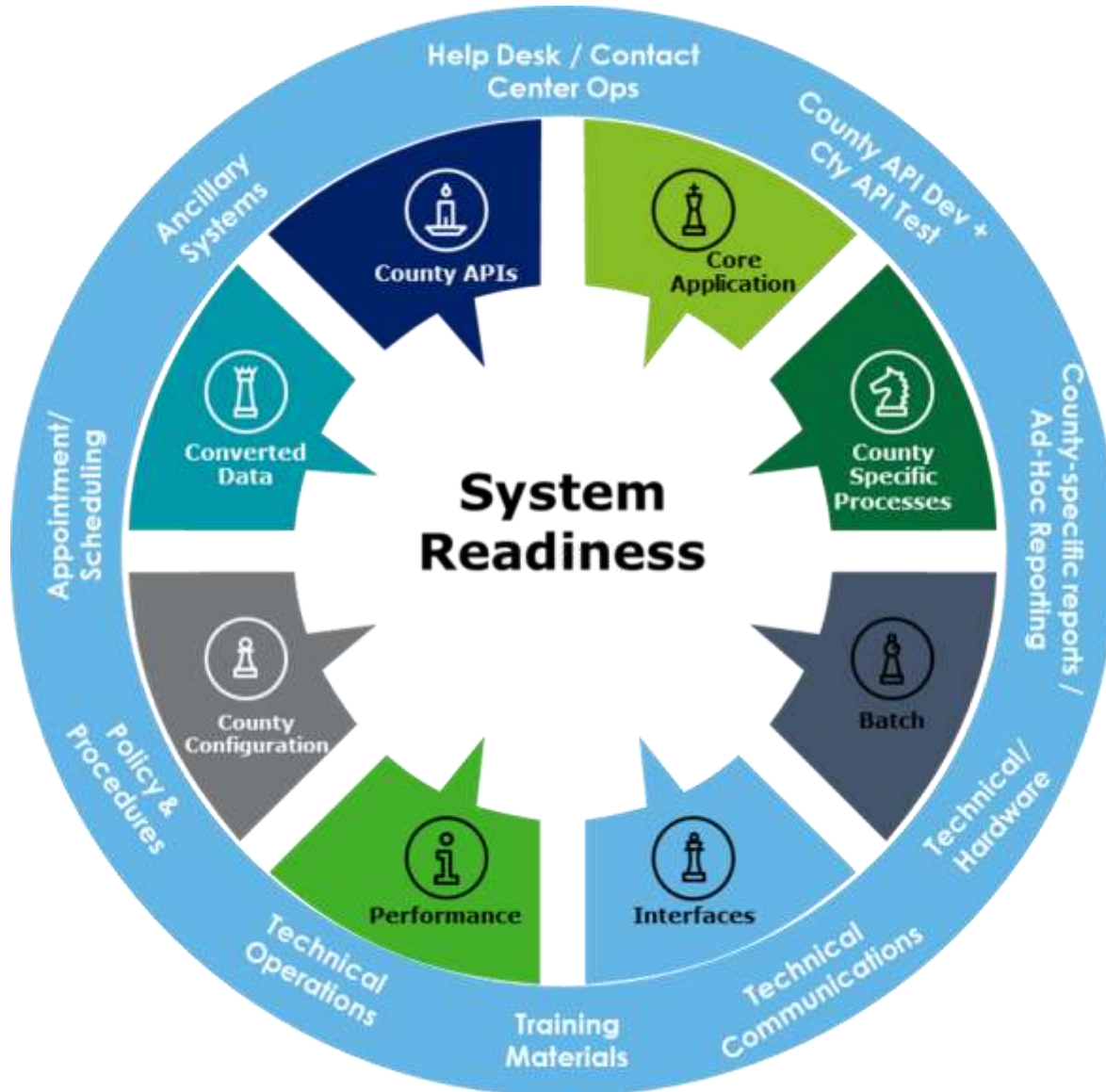
Collectively, We Need to Check a Number of Our Gauges Before CalWIN Onboards

Core application includes: CalSAWS, Lobby Management, Reporting, Central Print, Task Management, BenefitsCal, Contact Center, Imaging

Destination: 58 Counties
CalWIN Strategy Overview: Validation Areas

System Readiness (wheel diagram)

- Help Desk / Contact Center Ops
- County API Dev + Cty API Test
- County-specific reports / Ad-Hoc Reporting
- Technical/ Hardware
- Technical Communications
- Training Materials
- Technical Operations
- Policy & Procedures
- Appointment/ Scheduling
- Ancillary Systems

Inner segments:
- County APIs
- Core Application
- County Specific Processes
- Batch
- Interfaces
- Performance
- County Configuration
- Converted Data

Areas Needing Re-Routing Plans

- Converted Data Test (CDT) defects not resolved prior to CalWIN UAT start could impact the user experience for User Acceptance Test (UAT) participants

- The scaling of Batch for 58 Counties may have an impact on system performance

- GA/GR UAT and County Data Validation functionality may be delayed past May 2022

- CalWIN County waves may not complete their Imaging migration readiness activities by their designated wave go-live dates

- Imaging scalability, performance degradation, and Operational Process risk may impact the go-live dates for upcoming counties

- CalWIN Counties may not have enough development and testing timeline to Refactor their Reports and Ancillary Systems before Go-Live

- The CalWIN counties may not be fully prepared for go-live if they do not have sufficient or timely information

- Project Readiness for CalWIN cutover to CalSAWS
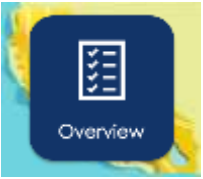
Destination: 58 Counties
What Test Drives Will there be Along the Way?

Converted Data Testing

Performance Testing

User Acceptance Testing

Interface Partner Testing

County Data Validation

Process Simulation

County API Testing

Destination: 58 Counties
What Test Drives Will there be Along the Way?

Overview

Drivers & Passengers

Converted Data Test
Conversion of CalWIN data to CalSAWS
- CalSAWS
- QA
- Conversion

Performance Test
CalSAWS core and batch perform to requirements
- CalSAWS
- QA

User Acceptance Test
CalSAWS functionality leveraging converted CalWIN data
- Counties
- State Partners
- Policy & Design
- QA

Interface Partner Testing
Interfaces between trading partners
- Counties
- System Test
- QA
- Conversion

County Data Validation
County-specific converted data and configurations
- Counties
- QA
- Conversion

County API Testing
County-specific APIs
- Counties
- QA
- Conversion

Process Simulation
County-specific Business Processes
- Counties
- QA
- ISS Team

Destination: 58 Counties
What Do We Have to Pick up/Pack Along the Way?

- To Be Process Model Approval

- Task Configuration

- Document Routing Configuration

- County Offices Configuration

- Role Security Acct Configuration

- County Opt-Ins Configuration BenefitsCal

- Call Routing Configuration

- Converted Data Load

- CBO Initial Load

Destination: 58 Counties
What Does the Road Look like for Wave 1 from CalWIN to CalSAWS?

2022

JAN T-10	FEB	MAR	APR	MAY	JUNE T-5	JULY	AUG	SEPT	OCT	NOV	DEC

Data Cleansing

Prepare App Security for Conv

Provide Data Sets for Ancillary Conversion

1

PGL: Data Clean-Up

PGL: Conversion Support

Conversion Readiness

Destination: 58 Counties
What Does the Road Look like for Wave 1 from CalWIN to CalSAWS?

2022

JAN T-10	FEB	MAR	APR	MAY	JUNE T-5	JULY	AUG	SEPT	OCT	NOV	DEC

Reqs Gathering

SD-WAN & Ckt

Extranet Enable

TPX Circuit Proc

Network Installs

Site Surveys

IPT Readiness

Network Router

Technical Readiness Ready for Go-Live

Tech Ops + Comms

1

PGL: Command Center + Tech Ops
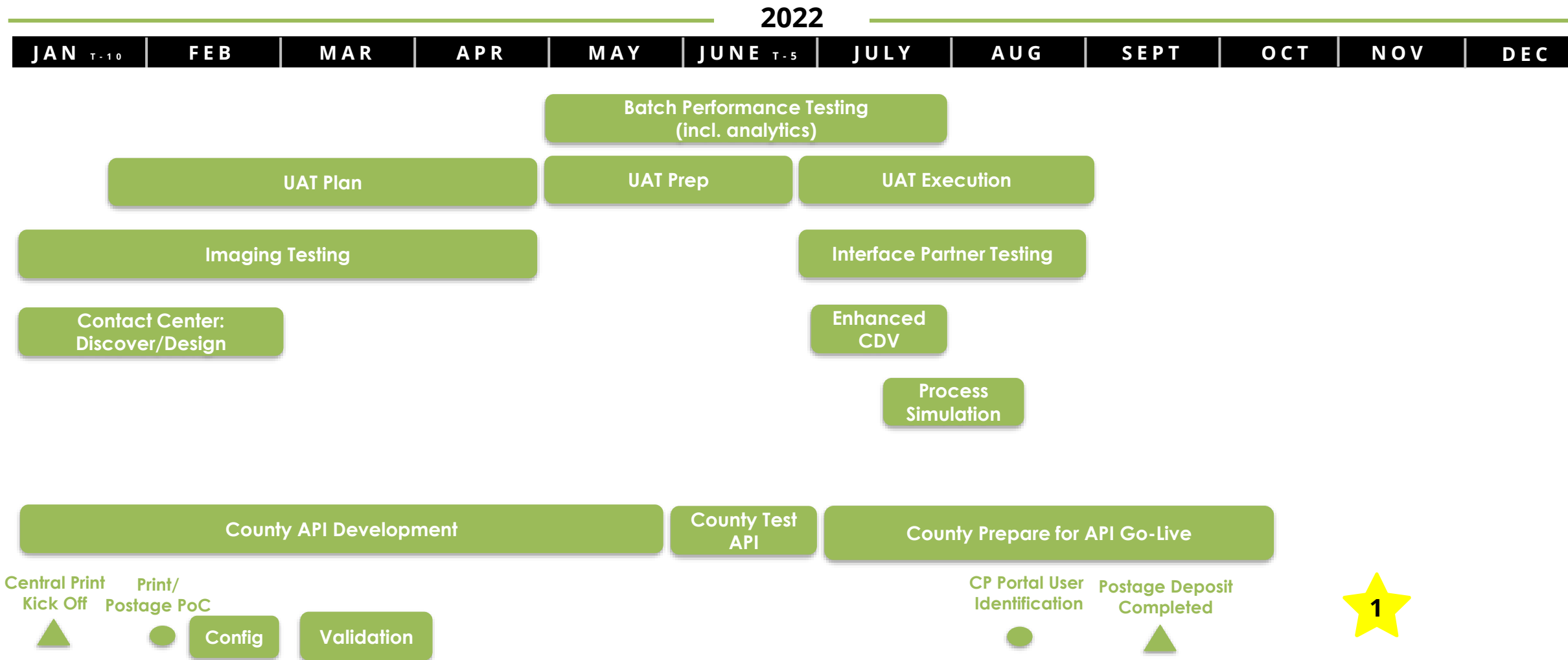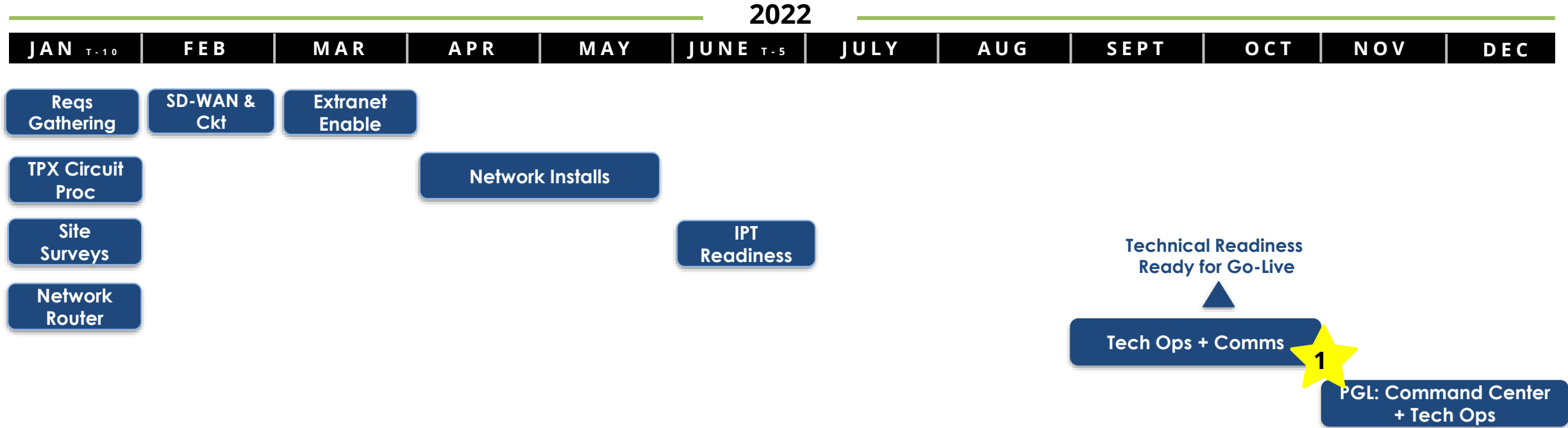
Technical Readiness

Destination: 58 Counties
What Does the Road Look like for Wave 1 from CalWIN to CalSAWS?

2022

| JAN T-10 | FEB | MAR | APR | MAY | JUNE T-5 | JULY | AUG | SEPT | OCT | NOV | DEC |

CalSAWS WBT: EL/TTT

W1 Trng Plan

CalSAWS Early Learn/TTT

TAC Mtgs

CalSAWS WBT: End User

BenefitsCal Training

CalSAWS End User Training – Instructor Led

W1 Comms Plan

W1 CDG

Central Print Training

| T-9 Survey | | T-6 Survey | | T-3 Survey | BenefitsCal Comms |

CNC Mtgs

1
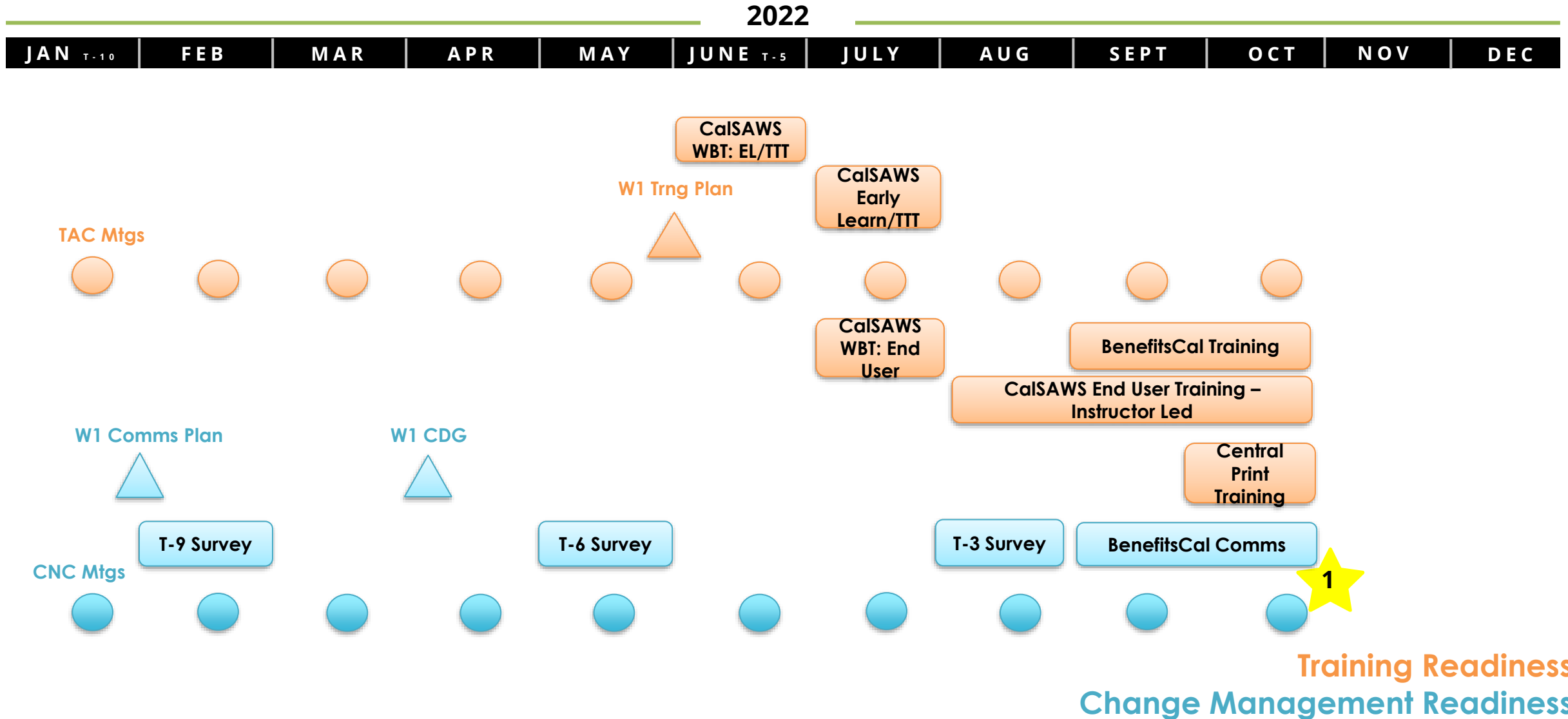
Training Readiness
Change Management Readiness

Destination: 58 Counties
What Does the Road Look like for Wave 1 from CalWIN to CalSAWS?

2022

| JAN T-10 | FEB | MAR | APR | MAY | JUNE T-5 | JULY | AUG | SEPT | OCT | NOV | DEC |

CRG #3

Network Installs

Readiness Packet + Dashboards [Project + W1 Counties]

Green Light Meetings

IPOC Kick Off

Global IPOC Mtgs

TOSS Teams Working with Counties

Cutover 1A

Cutover 1B

W1 Lessons Learned

County Prep

1

PGL: Command Center / Tech Ops

Post Imp Support

Implementation Readiness

Destination: 58 Counties
What Does the Road Look like for Wave 1 from CalWIN to CalSAWS?

2022

JAN T-10	FEB	MAR	APR	MAY	JUNE T-5	JULY	AUG	SEPT	OCT	NOV	DEC

Data Cleansing

PGL: Conversion Support

Prepare App Security for Conv

PGL: Data Clean-Up

Provide Data Sets for Ancillary Conversion

Batch Performance Testing (incl. analytics)

UAT Plan

UAT Prep

UAT Execution

Imaging Testing

Interface Partner Testing

Enhanced CDV

Contact Center: Discover/Design

Process Simulation

County API Development

Cty Test API

Cty Prepare for API Go-Live

Central Print Kick Off

Print/Postage PoC

Config

Validation

CP Portal User Identification

Postage Deposit Completed

TAC Mtgs

W1 Trng Plan

WBT: EL/TTT

Early Learn/TTT

BenefitsCal Training

WBT: End User

End User Training – Instructor Led

W1 Comms Plan

W1 CDG

CP Training

CNC Mtgs

T-9 Survey

T-6 Survey

T-3 Survey

BenefitsCal Comms

IPOC Kick Off

CRG #3

Readiness Packet + Dashboards [Project + W1 Counties]

Green Light Meetings

Global IPOC Mtgs

TOSS Teams Working with Counties

1 Contra Costa Placer Yolo

W1 Lessons Learned

Reqs Gathering

SD-WAN & Ckt

Extranet Enable

Technical Readiness Ready for Go-Live

TPX Circuit Proc

Network Installs

Cutover 1A

Cutover 1B

Site Surveys

IPT Readiness

County Prep

PGL: Command Center / Tech Ops

Network Router

Tech Ops + Comms

Post Imp Support

Destination: 58 Counties
County Involvement – Path to Readiness

Area	Timing	County Effort	Skill-Sets
Conversion Complete Data Cleansing + Data Cleanup	Ongoing; increased LOE towards migration and immediately post go-live	Varies by County	• Case-carrying workers; Conversion Leads help coordinate efforts within the CalWIN Counties
Validation UAT	May – September 2022	Up to 14 - 1 county representative for the 14 program/Functional areas	• Deep and/or broad program policy and functional knowledge SAWS and public portal applications • Ability to analyze and identify issues/concerns • Ability to communicate effectively and succinctly, and self-directed
Validation County Data Validation	T-4	Varies by County	• Participated in UAT, Connectivity Testing, and/or Early Training • Eligibility and/or Employment Services case carrying staff and subject matter experts (SME) in their Counties • Fiscal SME in their Counties
Validation Process Simulation / County-Specific Configuration	T-4 - T-3	10-20 part-time	• Configuration resources and roles supporting key county processes • Can be combined with UAT resources
County Configuration Production Configuration (Task Management, Office Setup, Acct Info, GA/GR Admin Setup)	T-2 – T-1	Same as UAT + Process Simulation	• Task management configurations; appointment scheduling (manual entry) • Security Administrators; TPOCs, IPOCs
County APIs / Interfaces	T-2 – T-1		

Destination: 58 Counties
County Involvement - Path to Readiness

Area	Timing	County Effort	Skill-Sets
Implementation IPOCs	Ongoing; increased LOE towards migration	Primary + Secondary	
OCM Change Network Champions	Ongoing monthly + increased LOE towards migration	Varies by County	• Participates in CNC meetings, support staff awareness and learning of new processes, ensure CalSAWS communications reach staff, share and discuss the Change Discussion Guides
Training TAC Meetings	Ongoing monthly		• Review county training plan, logistics; review CalSAWS training materials
Training Train the Trainers (TTT)	T-5 – T-4		• Participate in the CalSAWS TTT, including CalSAWS functions by role, Imaging, and Contact TTT Center; practice training delivery, and support End User ILT training delivery
Training End User Instructor-led Training (ILT)	T-4 – T-3		• Trainers FT; End Users/County Staff varies
Technical Technical Ops and Communications	Ongoing; Initial ramp up in Jan-Feb; increased LOE June - Sept	Primary + Secondary	
Contact Center / Help Desk Technical Ops and Communications			
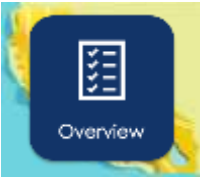
Destination: 58 Counties
What Does the Road Look like for Waves 2-6 from CalWIN to CalSAWS?

T – 12	T – 11	T – 10	T – 9	T – 8	T – 7	T – 6	T – 5	T – 4	T – 3	T – 2	T – 1

Data Cleansing Opportunities [e.g. Longitude/Latitude + Case Review Guides + Data Cleansing Support Tool]

Prepare App Security for CON

Provide Data Sets for Ancillary Conversion

UAT Plan*   UAT Prep*   UAT Execution*

Enhanced CDV

Contact Center Kick-Off

Interface Partner Testing   Process Simulation

Contact Center: Discover/Design

Imaging Testing

County API Onboarding

Imaging Export/Imports

County API Development   Cty Test API   Cty Prepare for API Go-Live

CP Portal User Identification   Postage Deposit Completed

Central Print Kick Off
Print/Postage PoC

Config   Validation

CP Training

WBT: EL/TTT   Early Learn/TTT

BenefitsCal Training

TAC Mtgs

WBT: End User   End User Training – Instructor Led

Comms Plan   T-12 Survey

CDG

T-9 Survey

CNC Mtgs

T-6 Survey

T-3 Survey   BenefitsCal Comms

W1 CDG

Readiness Packet + Dashboards [Project + W1 Counties]

Green Light Meetings

Global IPOC Mtgs

TOSS Teams Working with Counties

Technical Readiness Ready for Go-Live

Cutover 1A   Cutover 1B

Reqs Gathering

TPX Circuit Proc

Site Surveys   Network Router   SD-WAN & Ckt   Extranet Enable

Network Installs   IPT Readiness

County Prep

Tech Ops + Comms

*UAT timing is global for all counties and will shift based on wave view
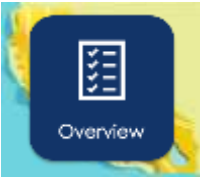
Implementation Framework
On the Road to Go Live We Will Increase the Levels of Readiness Review

T-12

Wave 1 County Specific Work Plan

T-10

County Readiness Checklists

T-9 to T-6

Project/Application Implementation Readiness Efforts

T-6

Project/County Imp. Readiness Dashboard + Packet

T-5

Green Light Governance Meetings
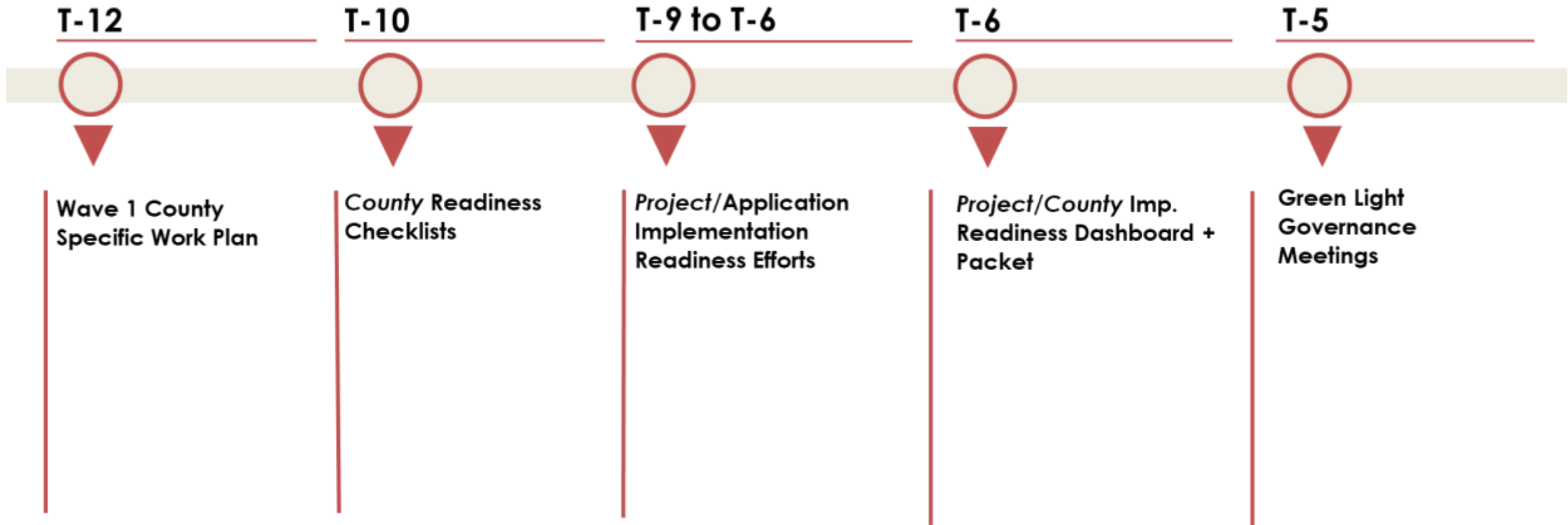
Destination: 58 Counties
How Will We Monitor Progress Along the Way?

System Readiness

County Readiness Dashboard

Green Light Process
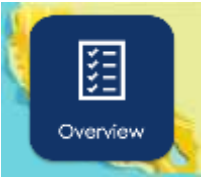
Destination: 58 Counties
What Roadside Assistance is Available for the Trip?

County Buddy Program

Targeted Topics Sessions

Forumbee

TOSS Teams

Sandbox

CRGs

Site Support (30 days Pre and 60 days post)

Destination: 58 Counties
Buddy County

- CalSAWS Counties helping each other
- Pre and Post Go Live Support for questions, sandbox, preparation, etc.
- Forumbee

Destination: 58 Counties
Buddy County - Connect

- How to create connections/Buddies?
  - Use your Regional Managers
  - Discuss at your Regional Meetings
  - Discuss with your Regional Committee Members
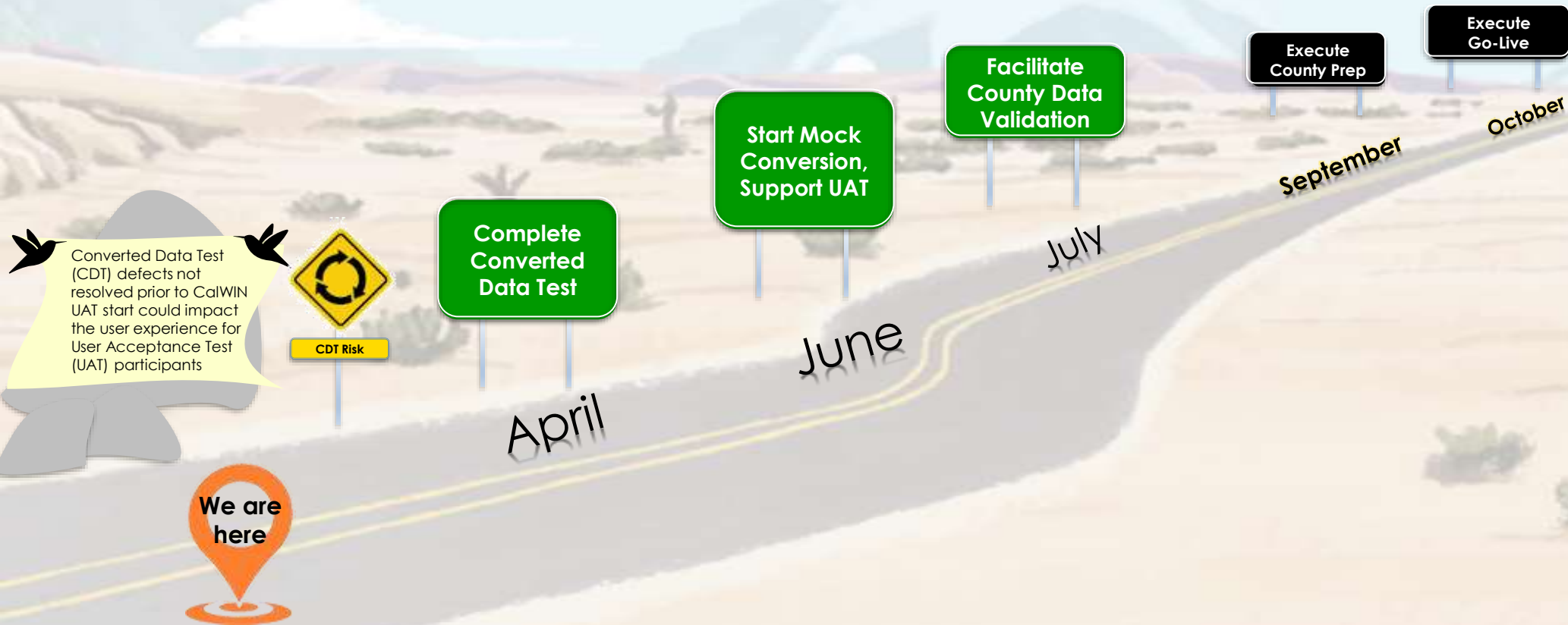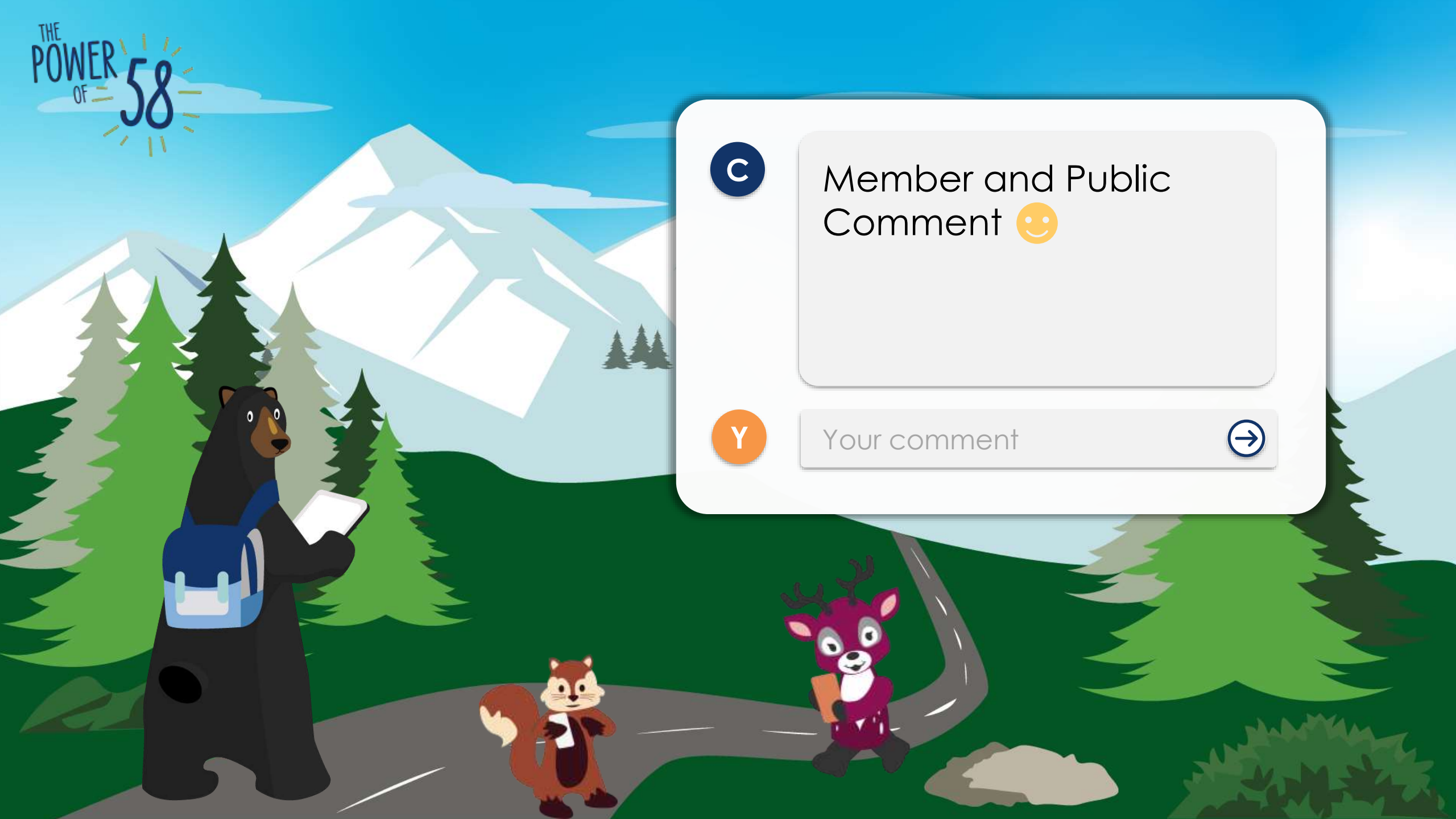
Destination: 58 Counties
User Acceptance Testing

CalSAWS CalWIN UAT Preparation is Underway!

- UAT will encompass End-to-End scenarios with broad CalSAWS application functionality

- We are in the preparation phase developing Test scenarios and soon to engage counties in the reviews

- We are excited for CalWIN counties to join CalSAWS

GA/GR UAT and County Data Validation functionality may be delayed past May 2022

Welcome to your UAT Journey!

Narrated by the UAT Management Team

Peggy Macias
CalSAWS UAT Manager

Surranjan Kumar
CalSAWS UAT Tech Manager

Rachel Hernandez
QA UAT Lead
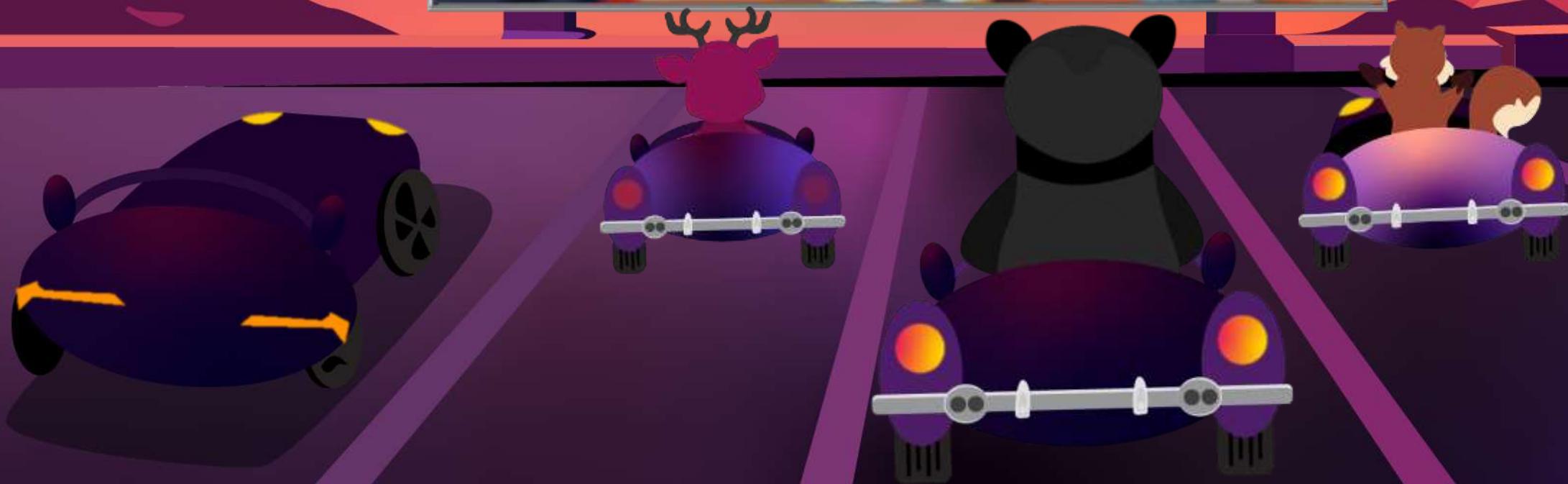
What is a Change Network?

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 the changes associated with the transition to CalSAWS.

Change Network Champion (CNC) Responsibilities and Activities

- Positively advocate for CalSAWS adopting by sharing benefits and role-modeling change behaviors
- Attending monthly CNC sessions and other related project meetings as needed
- Working collaboratively with CalSAWS OCM and Implementation Teams to disseminate communications to stakeholders
- Answering questions and guiding others to project resources and information
- Collecting and sharing feedback and escalating concerns as needed
- Leveraging their expertise and user perspective to support development of change management communications and products including the County Change Discussion Guides
- Providing on-site support to co-workers

Change Network Champion Structure

CNC Wave Groups	Counties	CNC Recruitment	CNC Kick Off	Go-Live Date
Waves 1 & 2	Wave 1: Contra Costa, Placer, Yolo	December 2021	January 2022	October 2022
	Wave 2: Santa Clara, Tulare	December 2021	January 2022	February 2023
Waves 3 & 4	Wave 3: Orange, Santa Barbara, Ventura	June 2022	July 2022	April 2023
	Wave 4: San Diego, San Mateo, Solano, Santa Cruz	June 2022	July 2022	June 2023
Waves 5 & 6	Wave 5: Alameda, Fresno, Sonoma	October 2022	November 2022	August 2023
	Wave 6: Sacramento, San Francisco, San Luis Obispo	October 2022	November 2022	October 2023
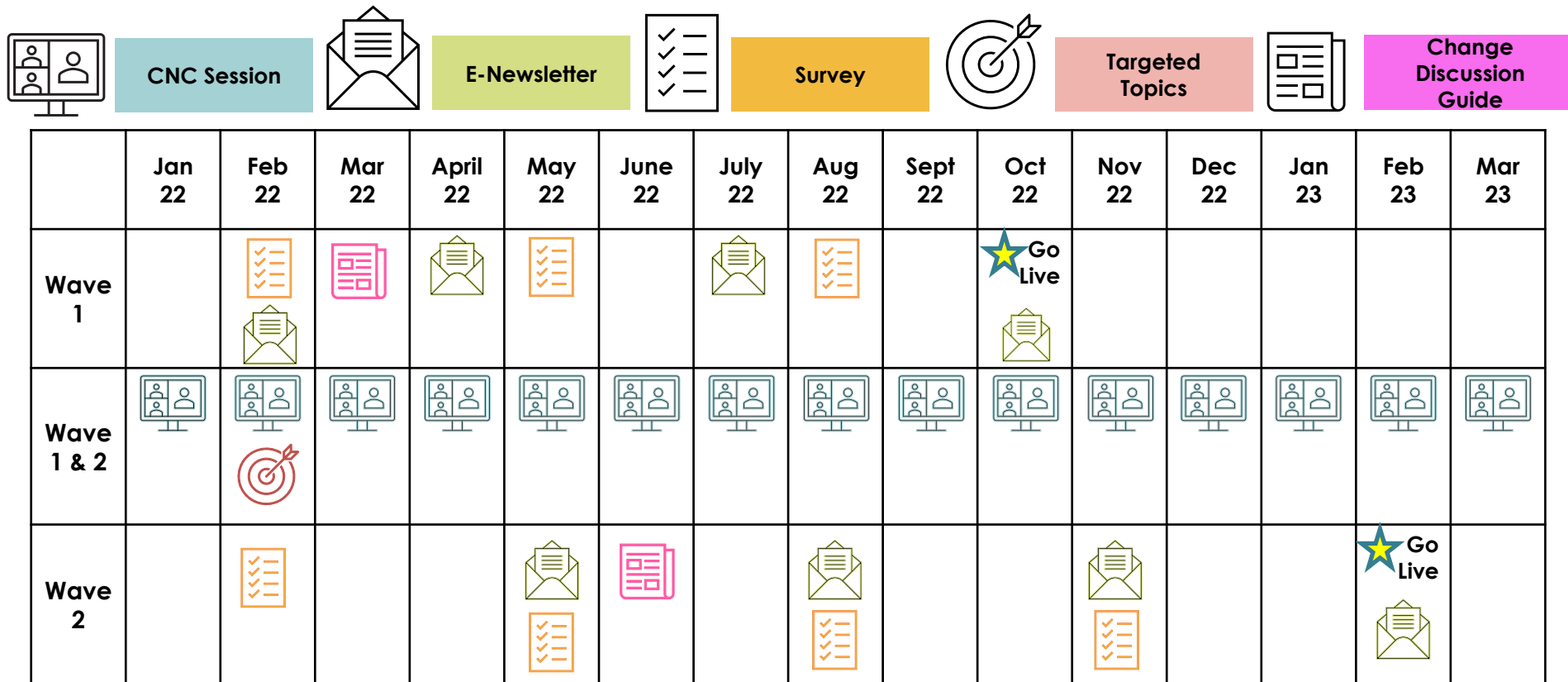
Destination: 58 Counties
Training

- **CalSAWS Training for CalWIN Counties**
  - It's *different* from C-IV Migration Training: Web-based Training, Instructor-led Classroom Training, Practice Labs, and a personalized *Learning Journey Map*
  - Training is Scheduled 8 to 12 weeks prior to each Wave's Go-Live
    - Each county has a Train the Trainer course so that county trainers can assist in the Instructor-led Classroom Training
    - Those who support CalSAWS implementation are scheduled first (supervisors, trainers, managers, help desk, and others)
    - All county staff receive training and practice in the training environment 1-week prior to Go-Live

- **Learning Journey Map**
  - It provides individuals with a customized digital learning experience to keep them _engaged_ in learning throughout their CalSAWS training path.

Destination: 58 Counties
Implementation Readiness

T – 6:
Implementation Readiness
Dashboard + Packets

T – 10:
County Implementation
Readiness Checklist

T-2
months

Go Live and
Beyond

T-4
months

T-6
months

T-10
months

T-1
month

T-5
months

T-3
months

T-8
months

T – 0
Command Center
Operations + Post
Implementation
Support

T-7
months

T – 5:
Green Light Governance
Meetings

T-9
months

T-11
months

T-12
months

T – 9 to T – 5:
Project/Application
Implementation
Readiness Efforts

T – 12:
County Specific
Workplans

Project Readiness for CalWIN cutover to CalSAWS

The CalWIN counties may not be fully prepared for go-live if they do not have sufficient or timely information

CalWIN County waves may not complete their Imaging migration readiness activities by their designated wave go-live dates

CalWIN Counties may not have enough development and testing timeline to Refactor their Reports and Ancillary System before Go-Live

Destination: 58 Counties
Implementation Readiness

Managing implementation through a wave approach for pre-implementation activities
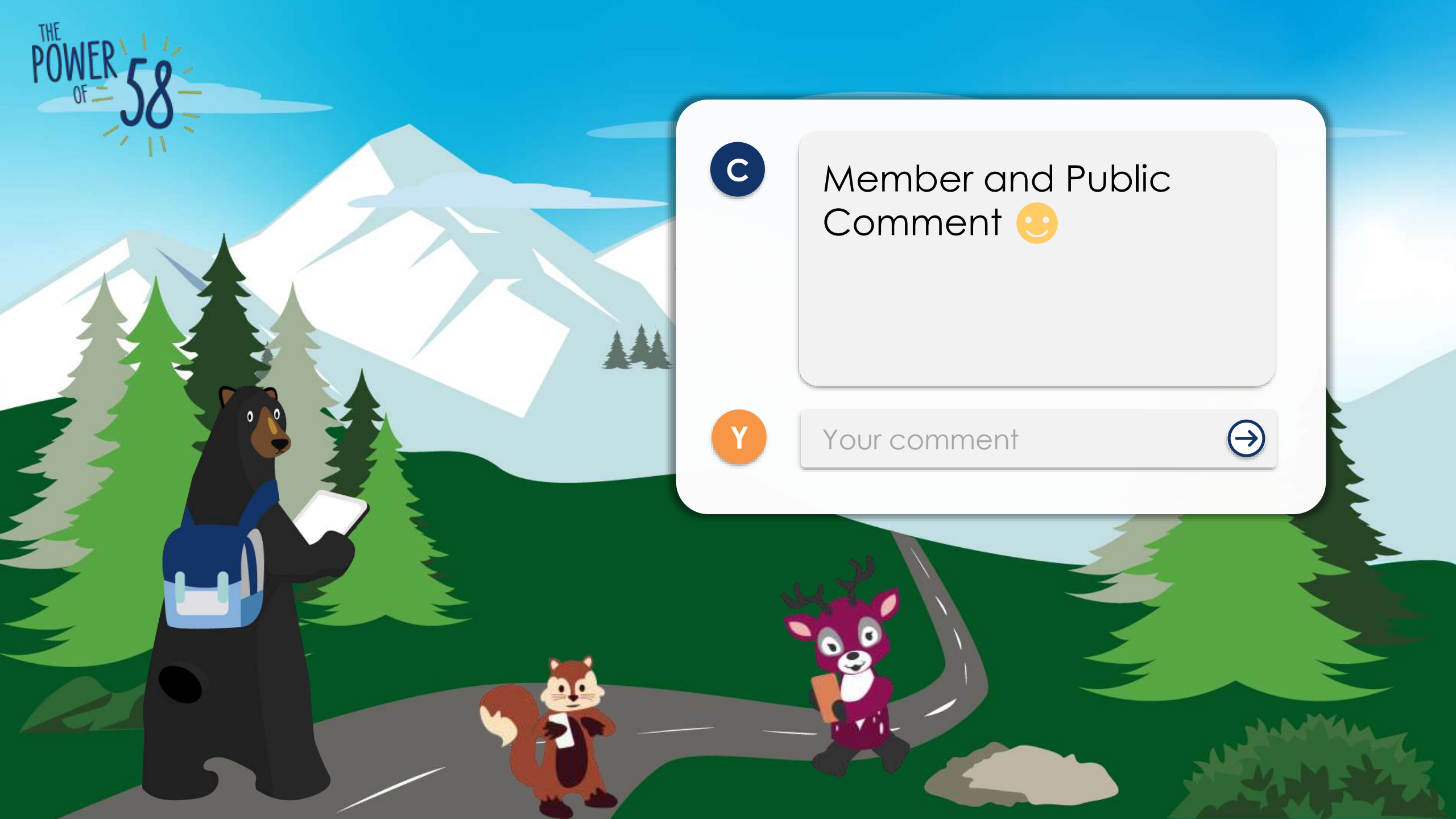
Counties	IPOC Recruit	IPOC Kick-Off	Global IPOC Meetings (Monthly)	County Specific Workplan (T-12 months)	TOSS Team + Wave IPOC Mtgs (T-10 months)	County Readiness Checklists (T-10 months)	Imp. Readiness Packet + Dashboard (T-6 months)	Green Light Governance Meetings (T-5 months)
Wave 1: Contra Costa, Placer, Yolo *Go-Live Oct 2022*	Dec 2021	Jan 2022	March 2022	Nov 2021	Jan 2022	Jan 2022	May 2022	June 2022
Wave 2: Santa Clara, Tulare *Go Live Feb 2023*	Dec 2021	Jan 2022	March 2022	Feb 2022	April 2022	April 2022	Aug 2022	Sept 2022
Wave 3: Orange, Santa Barbara, Ventura *Go Live April 2023*	Dec 2021	Jan 2022	March 2022	April 2022	June 2022	June 2022	Sept 2022	Nov 2022
Wave 4: San Diego, San Mateo, Solano, Santa Cruz *Go Live June 2023*	Dec 2021	Jan 2022	March 2022	June 2022	Aug 2022	Aug 2022	Dec 2022	Jan 2023
Wave 5: Alameda, Fresno, Sonoma *Go Live Aug 2023*	Dec 2021	Jan 2022	March 2022	Aug 2022	Oct 2022	Oct 2022	Feb 2023	Mar 2023
Wave 6: Sacramento, San Francisco, San Luis Obispo *Go Live Oct 2023*	Dec 2021	Jan 2022	March 2022	Oct 2022	Dec 2022	Dec 2022	April 2023	May 2023

Destination: 58 Counties
Central Print

- Transition to Central Print will occur at the same time as the transition to CalSAWS
- Contra Costa and Tulare Counties have submitted their decision to opt into Central Print

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

Destination: 58 Counties
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.

Upcoming County Activities

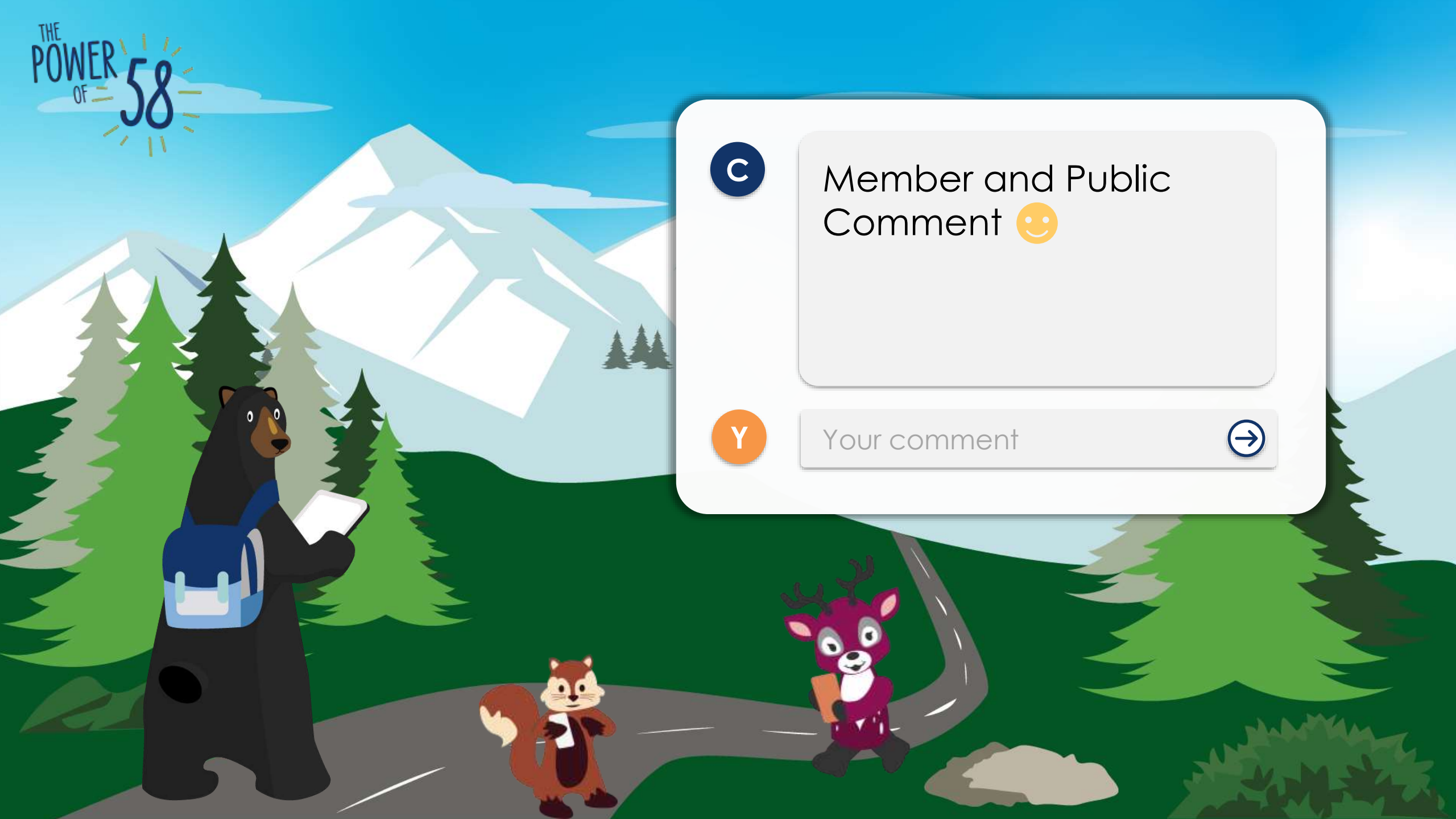|	Wave 5	Wave 6
Kickoff Meeting	September 2022	November 2022
Print and Postage POCs Identified	September 2022	November 2022
Configuration Meetings as applicable	October 2022	December 2022
Validation Meeting as applicable	November 2022	January 2023
Central Print Portal User Identification	February 2023	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.

Point of Interest: San Bernardino BOTS

Innovation Point of Interest

Member & Public Comments

Point of Interest: San Bernardino Bots Update

March	April	May	June	July	August	Sept	Oct	November	Dec	Jan

Authentication Bot Development | **Authentication Bot in Production**

Welcome Bot Development | **Welcome Bot in Production**

CalSAWS IVR/CC
San Bernardino Bots Outcome

Authentication Bot

- Functionality added to the existing "login menu".
- Functionality configured using text-to-speech engine with English for the pilot.
- The authentication bot utilizes two of the following 6 available data points to authenticate a caller.

C-IV Case Number	PIN	SSN	DOB	Driver's License Number	EBT

Natural Language Understanding (NLU) Welcome Bot

Welcome Bot: when a call comes in, the bot asks an open-ended question like, "What are you calling about today?" The bot then takes the caller to the right location in the IVR-Tree or program queue.

15 Intents - covers the most requested programs and actions	Programs supported - CalFresh, CalWORKs, Medi-Cal	Potential for significant agent deflection and self-service

Push Notifications

- Push notifications leverages the existing self-service features.
- A maximum of two self-service items of the following will be pushed to the customer.
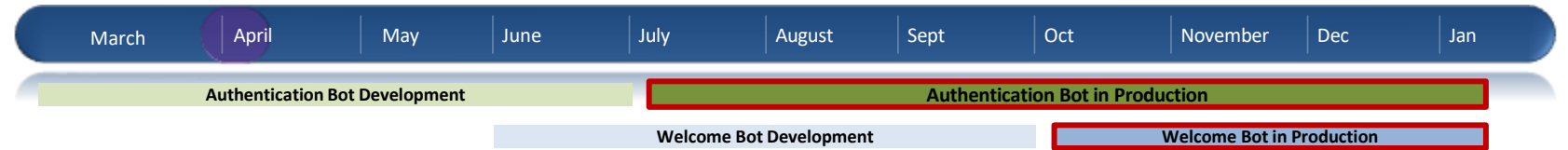
Benefits Info: CalWORKs, CalFresh, Medi-Cal, Welfare-to-Work	Document Status: CalWORKs/CalFresh/Medi-Cal – status report, redetermination	Document Request: Semi-annual report, Medi-Cal status report, Passport to services form

Point of Interest: San Bernardino BOTS Update

March	April	May	June	July	August	Sept	Oct	November	Dec	Jan

Authentication Bot Development

Authentication Bot in Production

Welcome Bot Development

Welcome Bot in Production

Transactions Processed

300K
Successful Authentications via AuthBot

88%
Effectiveness/ Success Rate for AuthBot

123K
Successful Interactions via WelcomeBot

77%
Effectiveness/ Success Rate for WelcomeBot
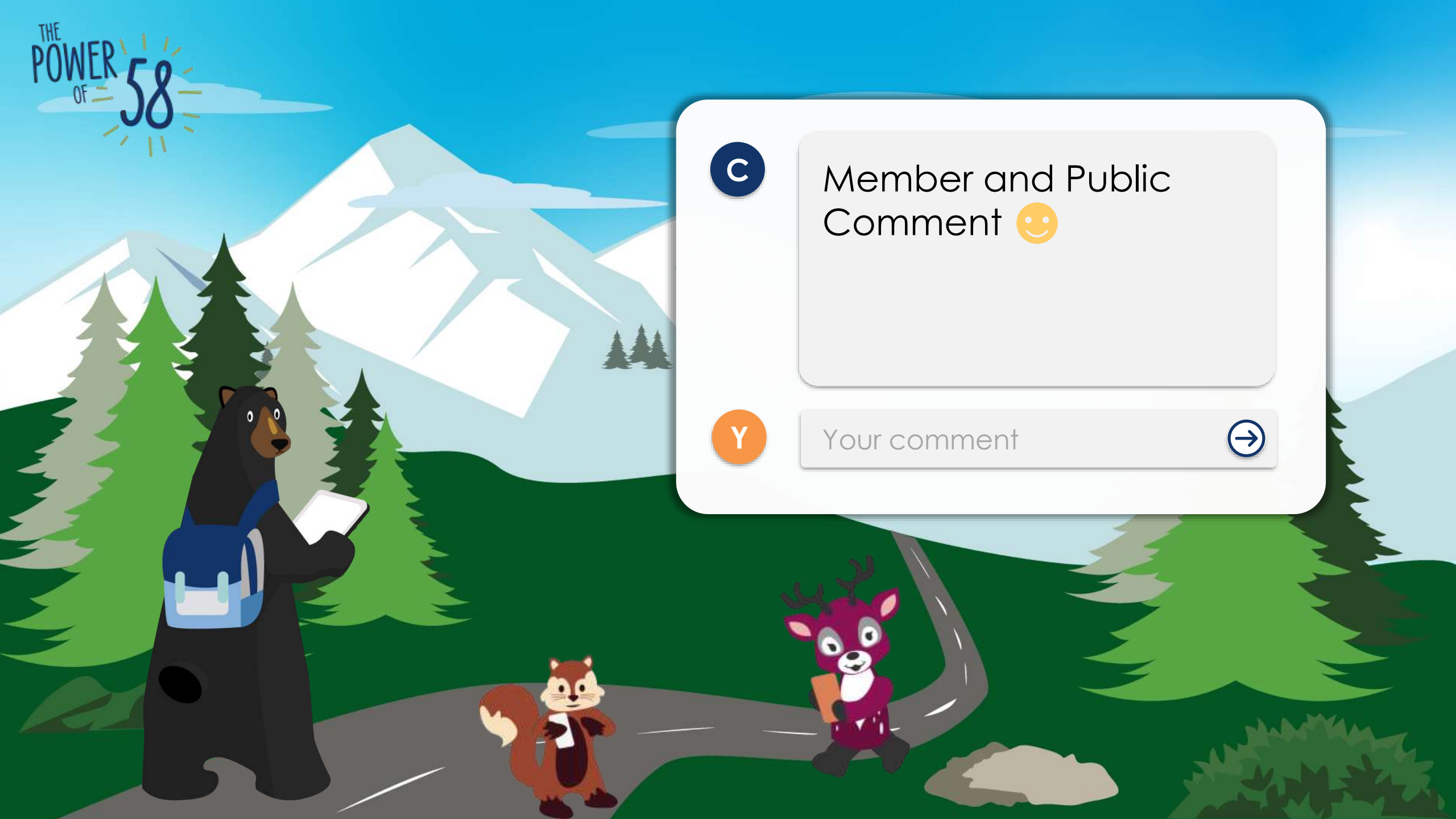
Next Steps
- Aggregate weekly reports produced by Authentication and Welcome Bots since go-live
- Validate report metrics with San Bernardino contact center management
- Estimate time and cost savings generated by each Bot
- Plan and prioritize future enhancements to further increase usage and success rate
- Exploring options for statewide rollout

# Point of Interest: Procurement Update

Procurement Update

- Develop 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 and SOWs: December 10 – 16.
  - Vendor Community Review of Requirements and SOWs: December 22, 2021 – January 21, 2022. (Extended by 2 weeks to request additional vendor input on procurement approach).
  - Analyze Vendor Responses to Procurement Questions: January 24 – 31.
  - Update and Finalize Requirements and SOWs: February 1 – 14.
  - Confirm Final Procurement Direction: February 15 – 28.

Point of Interest
Procurement Update

- 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 – January.
  - Develop Service Level Agreements (SLAs): January – February.
  - Prepare Price Schedules and Instructions: January – March.
  - Prepare Agreements: February – March.
- State Review and Approval: March 24 – May 5, 2022.
- Federal Review and Approval: May 12 – July 19, 2022.
- Release RFP: July 26, 2022.
- Proposal Due Dates: November 7, 2022. Vendors may bid on Infrastructure and/or M&E components.
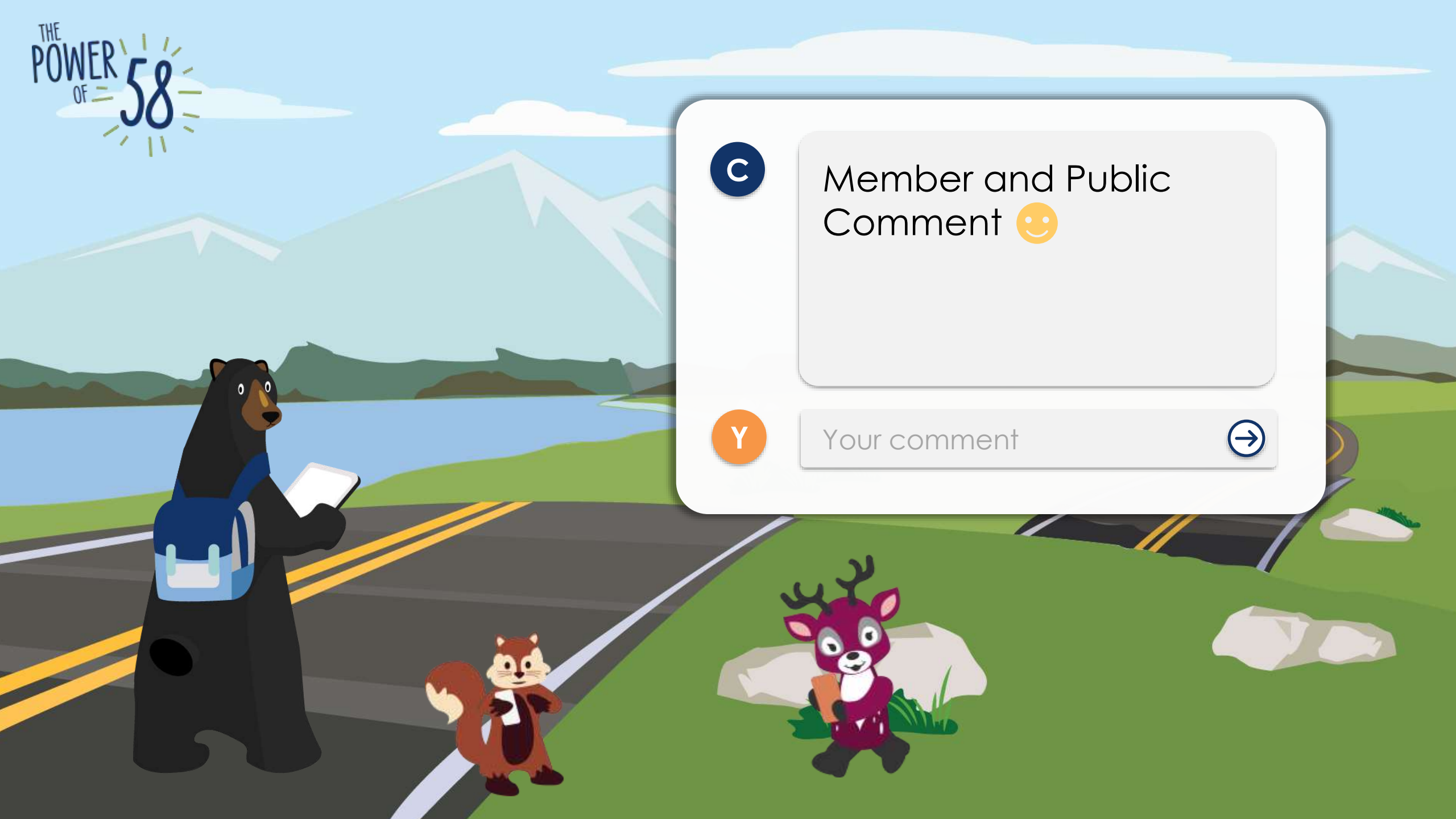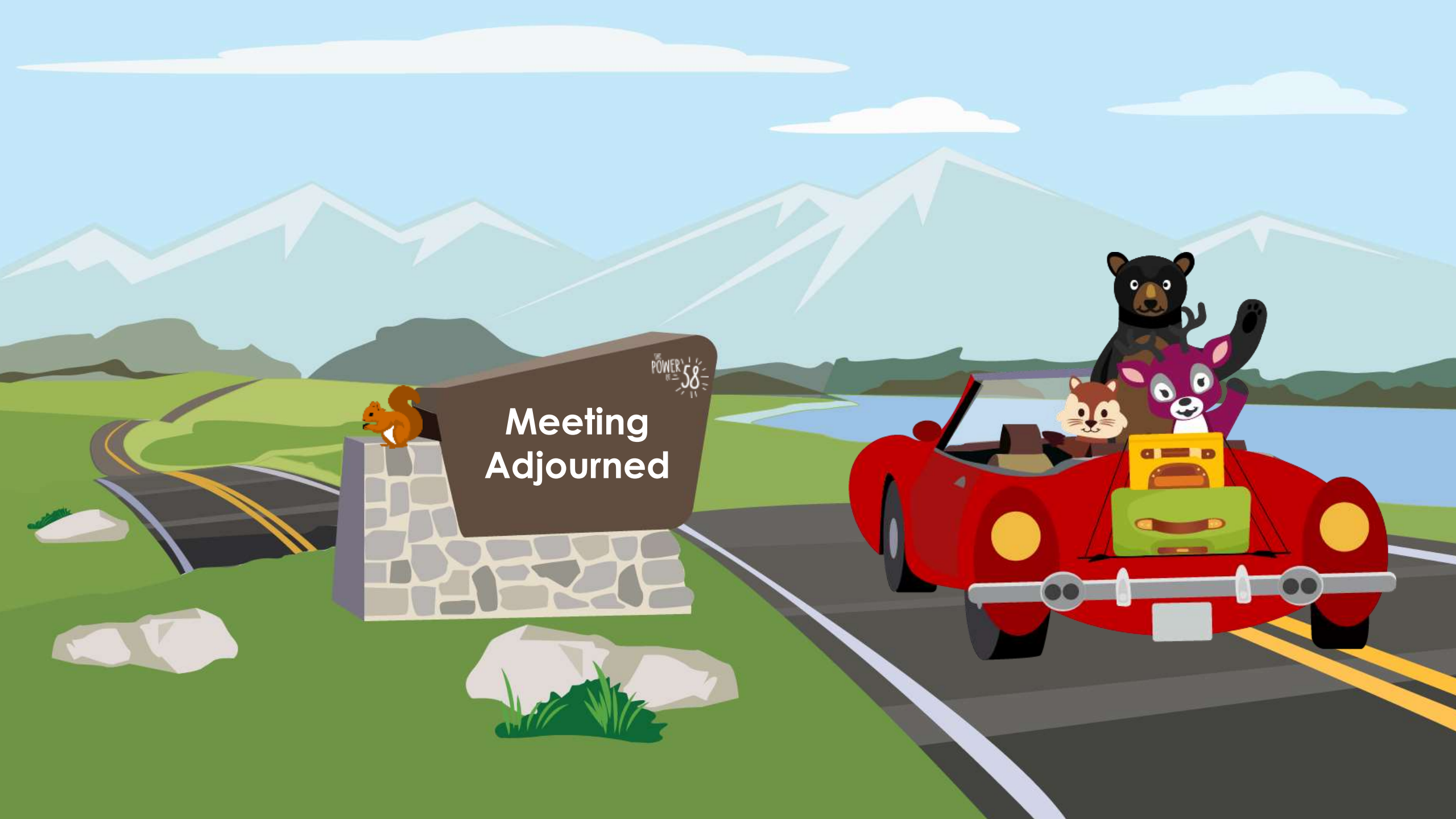
CalSAWS Conference
June 23, 2022

- Save the dates have been sent:
  - Thursday, June 23, 2022
  - 8:30 a.m. – 4:30 p.m.
- Requires quorum of the JPA Member Representatives
- Meeting will include:
  - A joint meeting of the JPA Member Representatives and JPA Board of Directors
    - ✦ Election of Board Members
    - ✦ Election of PSC Members
    - ✦ CalWIN Migration Prep Updates

Meeting
Adjourned