CalSAWS | Project Steering Committee Meeting



February 16, 2022

Agenda

Call Meeting to Order and confirmation of quorum 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 (6) minutes.

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

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

Action Items



Action Items

4. Approval of the Minutes from the December 16, 2021, PSC Meeting and review of Action Items.

Informational Items



February Legislative Staff Briefing Update

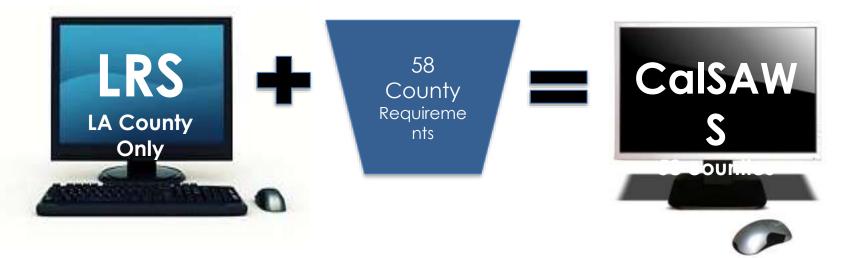


Journey to CalSAWS

Federal mandate to expand LRS (the SAWS for LA county only) to all 58 Counties by the end of calendar year 2023.

LRS was implemented in Los Angeles in 2016 with the expectation that it would become the foundation for the Statewide System.

Modifications made to make LRS a 58 County System with functionality and flexibility to serve all counties.



C-IV Migration to CalSAWS



Moving from 3 systems to 2 systems

After 2+ years of preparation, the majority remotely during the pandemic, C-IV counties were ready to move to CalSAWS

> On a long weekend in September 2021, CalSAWS became a reality when the 39 C-IV counties moved to the updated/former LRS (LA County) system!

> > All 40 counties were able to resume operations successfully on Monday, September 27, 2021

> > > Transaction volumes and system performance reflect pre-migration expectations and counties conduct business as usual

Ongoing Areas of Focus

Imaging performance

- After a bit of a rough start, stability of the imaging solution has significantly improved, and system performance is meeting expectations.
- The project continues to work with counties providing additional support as needed and preparing to transition LA County to the Hyland imaging solution.

Enhanced Support

- We are providing support for C-IV counties as we make updates and assisting the counties as they normalize and optimize productivity in the new system.
- Additional county engagement continues through ongoing support sessions to address correspondence and reporting questions.

Success by the Numbers

19K

Average number of users successfully using CalSAWS on a daily basis

\$1B+

Benefits issued for November impacting 3.75M cases across 40 counties

9M+

Transactions handled by the CalSAWS application on a daily basis

4.5M+

Images captured using the newly implemented Hyland Solution post C-IV Cutover

\$350K+

CalFresh Mass Replacement Benefits issued for October 2021 to support recipients on 4,200+ households in 17 counties due to power outages

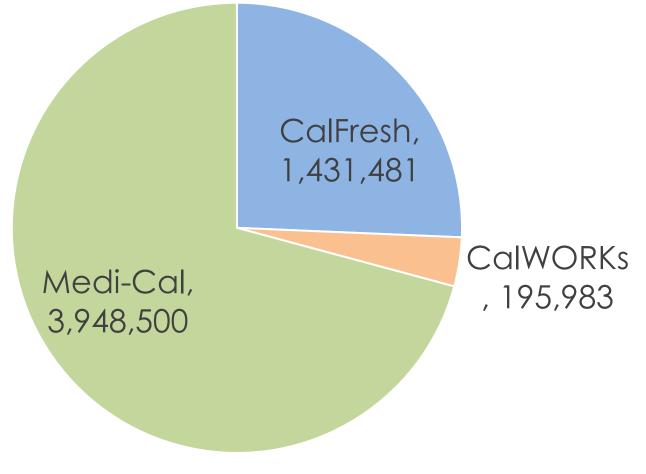
\$248M+

CalFresh Emergency Allotments issued for October 2021 impacting 1.5 million households across 40 counties

Note: User counts and transaction volumes are in line with pre-migration

numbers and volume.

CalSAWS Active Programs (40 Counties)



Note: Numbers reflect a point in time count as of 2/6/2022. Cases can have one or



BenefitsCal Implementation





What is BenefitsCal?

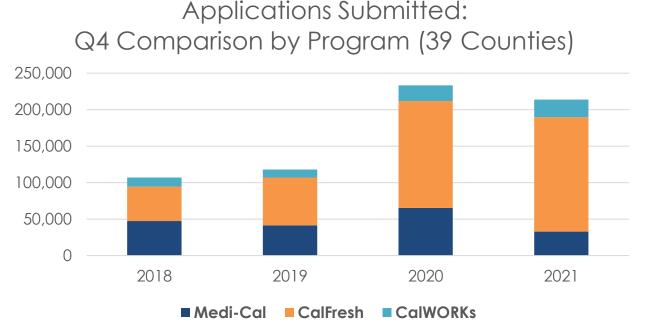
Historically, each SAWS had its own online customer website, also called a customer portal

- C4Yourself served 39 C-IV counties
- YourBenefitsNow serves LA county
- My BCW serves 18 CalWIN counties

With the move to CalSAWS, a single customer portal, called BenefitsCal was created

- BenefitsCal lets customers apply for benefits, submit periodic reports, and complete renewals
- Customers have self service options for many case actions, reducing the need for calls or appointments to see the worker
- CBOs can use BenefitsCal to assist customers with applications and submitting documents

Online Application Comparison by Program



Year	Medi- Cal	CalFresh	CalWORK s	Q4 Total
2018	47,372	47,147	12,447	106,966
2019	41,504	65,617	10,903	118,024
2020	65,324	146,570	21,501	233,395
2021	32,953	156,793	24,200	213,946

- Online applications surged in 2020 as the pandemic began
- Online CalFresh applications increased by 10,223 over 2020 (6.9%)
- Online CalWORKs applications increased by 2,699 over 2020 (12.5%)
- Online Medi-Cal applications decreased by 32,953 over 2020 (-49%), likely due to people staying on coverage during the Public Health Emergency



Online CalFresh Applications by Source (39 Counties)

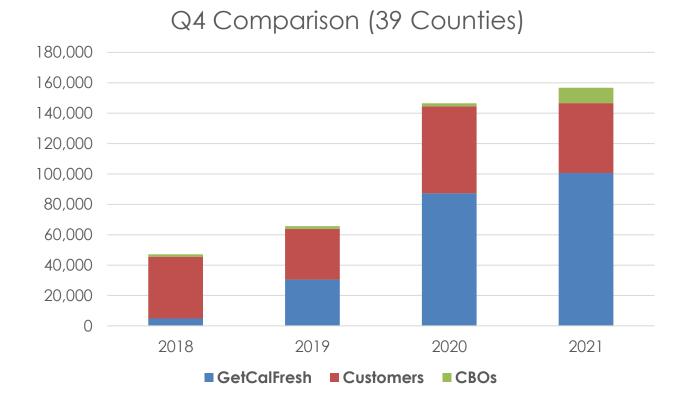


Chart compares online CalFresh application submissions in the 39 former C-IV counties during the fourth quarter of each year, by application source.

Applications submitted directly by CBOs increased 5x



Success By the Numbers

BenefitsCal went live on 9/27/21 with 39 counties, replacing the C4Yourself portal.

31,336 Average Daily User Sessions	5 38% Average Logins per Customer Customer Customer		6,437 Average Daily Views of	
1,622,156	146,125 Applications Submitted –		their EBT Balance	
Unique Logins 352	Medi-Cal, CalWORKs & CalFresh	75% Submit an app in less	19,568 Applications for >1 Program	
CBO Accounts Requested	16,903	than one hour		
170,344	Changes Reported	> 710/	785,370 Documents uploaded	
Customer Accounts Created	833 CBO Accounts Created	>71% Access from a Mobile Device		



Successes

- •Seamless customer transition
- Positive feedback on ease of use
- •More than 70% of customers accessed BenefitsCal from their mobile device the mobile-first design is a huge success
- Post go live response support was robust and rapid issue-to-fix in less than 24 hours
- •GetCalFresh has successfully submitted over 100K applications

What we learned

- •It was easier for customers to create a new account than to login to a converted account
- •Increased usage requires increased customer support from the counties
- Work early and often with advocates/state partners to identify priorities

On the horizon

- Upcoming releases will include added functionality
- Working with state partners on advocate prioritized requests such as Release of Information (ROI) & expanding Community Based Organization (CBO) dashboard details and reporting

LA County Move to CalSAWS Imaging & BenefitsCal



BenefitsCal/Imaging Implementation

Los Angeles County

- CalSAWS Imaging
 - •County testing began in January 2022
- Web Based Trainings (WBTs) are available now for designated staff and general training for all county staff will start on February 14, 2022
 CalSAWS will

provide post-

deployment

BenefitsCal

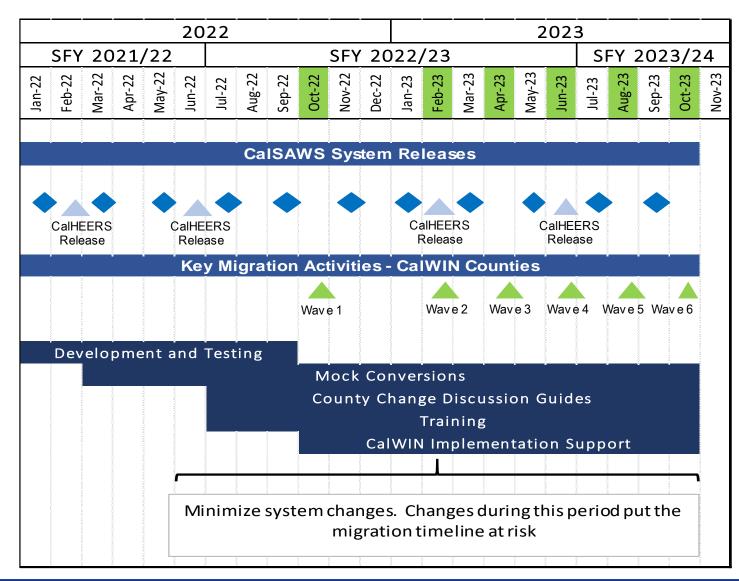
- County testing began on January 7, 2022
- Training will begin in February 2022
- CalSAWS, with BenefitsCal support, will provide postdeployment support after golive

LA County is currently targeted to move to BenefitsCal and CalSAWS Imaging in

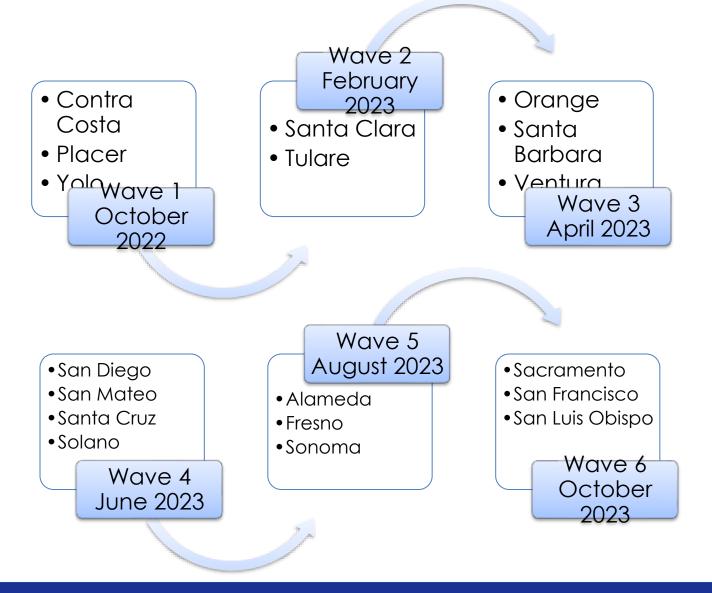
CalWIN Migration to CalSAWS



CalWIN Migration Activities



CalWIN Counties by Wave/Migration Month

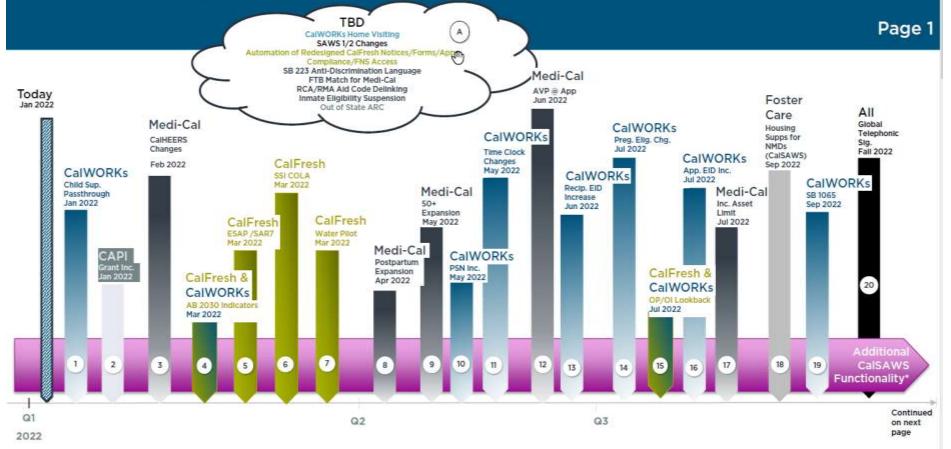


2022-2024 Existing Policy Commitments



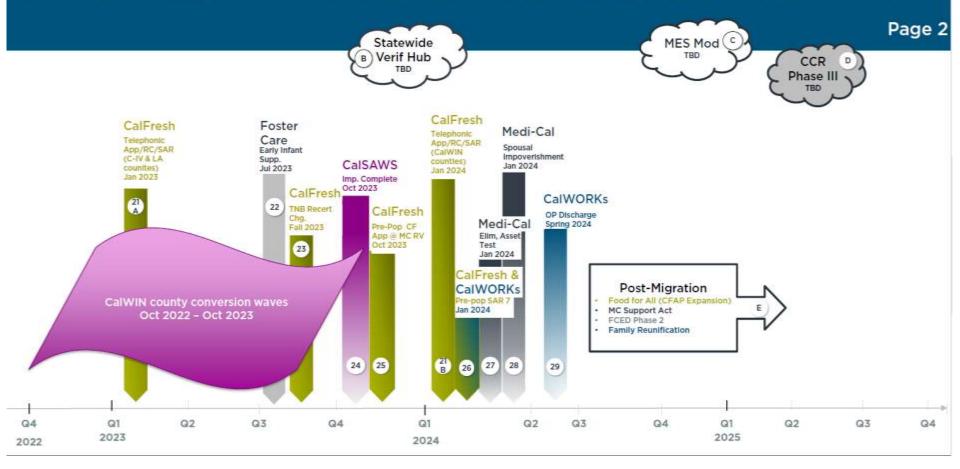
Existing Policy Commitments

Key Upcoming SAWS Initiatives, Policy Changes & Related Projects



Existing Policy Commitments

Key Upcoming SAWS Initiatives, Policy Changes & Related Projects



Policy Implementation Timeline Examples



Policy Implementation Timeline

A typical policy change (outside of the CalSAWS migration period) takes about 9 – 12 months

During the CalWIN migration waves, we will have limited ability to implement policy changes

Any specific policy implementation timeline is dependent on many factors:

- **Policy Guidance**: clear & complete final state policy, including notices translated into all threshold languages, quick turn-around on follow up questions
- Coordination with Other Changes: other changes underway; multiple releases are always in progress, so automation activities cannot always start immediately
- Competing Priorities: state policy, advocate requests, county requests
- Scheduling: CalSAWS releases are bi-monthly (odd months). Eligibility cycle and noticing timeframes require that automation must be available prior to the effective date in order to calculate benefits and generate timely notices.
 Example: Implement in January for a March benefit month.



Journey to CalSAWS

Our top priorities are migration and existing policy commitments. We anticipate having space for new policy changes beginning in mid-2024.



* Examples of prior year policy commitments (refer to Appendix for more):

- Medi-Cal Older Adult Expansion (for age 50+ regardless of immigration status)
- CalWORKs Time Clock Changes (increase to 60-month time limit and eliminate the 24-month clock)
- CalFresh Pre-populated SAR 7 form and pre-populated applications with Medi-Cal Renewal
- Medi-Cal Elimination of Non-MAGI Asset Limit

Wrap up



Appendix

- Emergency Response Activities
 - Public Health Emergency
 - Wildfires
 - EBT Scams
- 2020-2021 Policies Completed
- Existing Policy Commitments



Response to Public Health Emergency

In addition to our	Suspended Medi-Cal renewals and reporting requirements
planned work for	Suspended Medi-Cal batch discontinuances and negative actions
migration and existing policy efforts, the SAWS	Issued CalFresh pandemic Emergency Allotments to bring households to the maximum allotment for their household size. This is an ongoing monthly effort Increased CalFresh allotments by 15%
successfully supported	Suspended batch processes that would discontinue CalWORKs cases that reach their 48-month time limit
the counties	Applied a good cause exemption to not tick the CalWORKs 48- month and Welfare to Work 24-month time clocks
with the following	Issued Golden State Grants
unplanned efforts in response to	Continued to support payments for Foster Care non-minor dependents past the age of 21

Response to California Wildfires

In addition to planned work for migration and existing policy efforts, the SAWS successfully supported the counties with the following unplanned efforts in response to wildfires:

- Issued multiple mass replacements of CalFresh benefits due to power outages
- Worked with the state and counties to prepare and turn on the Disaster CalFresh application, which includes enabling the application on BenefitsCal and MyBenefitsCalWIN

Response to EBT Scams

In addition to planned work for migration and existing policy efforts, the SAWS successfully supported the counties with the following unplanned efforts in response to increased EBT scams:

Sent robocalls to all CalWORKs/CalFres h recipients who are opted into messaging regarding potential EBT scams (CalSAWS only) Sent text messages to all CalWORKs/CalFres h recipients who are opted into text messaging regarding potential EBT scams Sent e-notifications to all CalWORKs/CalFres h recipients who are opted into enotifications regarding potential EBT scams

Completed State Policy Commitments (page 1 of 2)

Program	Policy Item	Effective Date	CalSAWS	CalWIN
CalFresh	CalFresh Monthly Churn Report	January 2021	Done	Done
CalFresh	ABAWD Phase III	May 2021	Done	Done
CalFresh	Pause Transitional Nutritional Benefit (TNB) Recertifications	October 2021	Done	Done
CalFresh	Safe Drinking Water Pilot	November 2021	Done	N/A
CalWORKs	OCAT Rebuild & SAWS Integration	May 2020	Done	Done
CalWORKs	Vehicle Limit Increase – SB 80	July 2021	Done	Done
CalWORKs	CalOAR data validation and continued development of performance indicators	Ongoing	Done	Done
CalWORKs	Increase Asset Limit – SB 80	May 2021	Done	Done
CalWORKs	Maximum Aid Payment Increase	October 2021	Done	Done

Completed State Policy Commitments (page 2 of 2)

Program	Policy Item	Effective Date	CalSAWS	CalWIN
CalWORKs	Child support disregard to increase the pass-through payment to families AB 79	January 2022	Done	Done
CalWORKs	State Minimum Wage Increase	January 2022	Done	Done
CalWORKs CalFresh Medi-Cal	Statewide Online Portal - BenefitsCal	September 2021	Done	N/A
Child Care	Report and Online Provider Screen	January 2021	Done	Done
Medi-Cal	Asset Verification Program	CalWIN 11/2020 CalSAWS 3/2021	Done	Done
Medi-Cal	New Prepopulated MAGI and Non-MAGI Redetermination Packets	July 2021	Done	Done
Medi-Cal	Medicare Part B Disregard	August 2020	Done	Done
Medi-Cal	Aged Blind and Disabled FPL Expansion	December 2020	Done	Done

2022 Policy Changes In Process

Program	Policy Item	Policy Effective Date
CalFresh	Eliminate the SAR 7 reporting requirement for ESAP households	March 2022
Medi-Cal	Expand Postpartum care to 12 Months	April 2022
Medi-Cal	Older Adult Expansion – 50 and Older	May 2022
CalWORKs	60-month CalWORKs time limit and eliminate the 24-month clock AB 79	May 2022
CalWORKs	Increase Pregnancy Special Need	May 2022
CalWORKs	Increase the Applicant Earned Income Disregard	July 2022
CalWORKs	Pregnancy Eligibility Changes	July 2022

2022 – 2024 Policy Changes In Process

Program	Policy Item	Implementation Month
All	Global Telephonic Signature Solution	September 2022
CalFresh	Telephone based service model in all counties, supporting telephonic signatures for CalFresh applications, recertifications, and SAR 7s	January 2023 for current CalSAWS counties; January 2024 for current CalWIN counties
Foster Care	Early Infant Supplement AB 366/AB 153	July 2023
CalFresh	Update the Transitional Nutrition Benefit Recertification to be every 12 months	July 2023
CalFresh	Pre-populate SAR 7 form and pre-populate applications with Medi-Cal Renewals AB 79	January 2024
Medi-Cal	Eliminate Non-MAGI Asset Limit	January 2024

2024 and Beyond: Policy Changes In Process

Program	Policy Item	Implementation Month
Medi-Cal	Spousal Impoverishment	January 2024
Medi-Cal	Juvenile Support Act Federal Support Act/ W&I Code 14011.10	January 2024
CalWORKs	Overpayment Discharge ACL 19-102	March 2024
CalWORKs	Family Reunification SB 1341	July 2024
CalFresh	Food for All - CFAP Expansion	late 2024
All	Statewide Verification Hub	TBD

CalSA

Annual SAWS Updates

Anticipated recurring priorities for the upcoming year include:

	Type of Change	Examples	Key Considerations / Dependencies
Α	Annual Policy Updates	January: • SSA/SSI COLA • Medi-Cal Property Limits March • SSI COLA - CalFresh April: • Federal Poverty Levels July: • Foster Care/KinGap/AAP COLA October: • CalFresh COLA • CalWORKs MAP Increases • Income Reporting Thresholds	 Timing of Cutover activities Targeting running COLA in legacy systems prior to cutover to CalSAWS to allow comparison of benefits pre- and post-conversion to avoid any unintended impacts to customers during conversion

Project Support Strategy for Counties transitioning to CalSAWS Reporting (State, Management, and Ad Hoc)



CalSAWS Adhoc Reporting **CalWIN to CalSAWS Readiness Approach and Timeline**



- Explain County **Enhancement Request** (CER)
- Provide Overview of State, Management, and Dashboard Reports
- Provide Transition **Readiness**

Environments. Database Schema. and Converted Data

CalwIN Conversion **Mapping Report**

Update on Key Risks and the Mitigation Plans



Updates on Key Risks Risk Level: High

Risk #	Risk Name	Risk Description	Mitigation Plans / Status
236	The scaling of Analytics Dashboards and Reports for 58 Counties may have an impact on System Batch Performance	As the Analytics Dashboards and Reports are re- platformed and/or new or modified Dashboards and Reports are deployed into CalSAWS production, the increase in jobs (reports) and data (+18 counties to a total of 58 counties) could have a scalability impact on daily batch performance, thus putting at-risk these Dashboards and Reports being available for Counties by 6am each morning.	 Performance and Load Testing for Release J successfully completed Road Map with specific performance enhancements has been developed and being implemented by the Analytics team Oracle 19C upgrade deployed to Production 3 months of Performance Testing for Wave 1 scheduled for May through July
237	The scaling of Batch for 58 Counties may have an impact on system performance	The CalSAWS production batch schedule does not always complete by 6am. As part of DDI there will be growth in both the count of batch jobs and volume of data as additional counties are converted into CalSAWS. This growth may add a challenge to batch completing on time. Related Risk 236 addresses Analytics specifically. Risk 237 addresses mitigation activities to impact the entire batch cycle.	 Road Map with specific performance enhancements has been developed and are being implemented by the Analytics team, including changes to be released this monthAdditional architectural changes including event streaming and reducing batch processing targeted in the Spring 3 months of Performance Testing for Wave 1 scheduled for May through July Wave 2 Performance Testing scheduled for fall and a combined performance test for Waves 3-6 planned for the end of the year
256	Imaging Scalability, Performance degradation, and Operational Process risk may impact the go-live dates for upcoming counties	Due to the performance degradation experienced with the Hyland imaging solution post C-IV go live, a pause on further onboarding of counties (LA County) is in place until additional testing confirms the solution can scale and be performant at a 40 County load and 58 County state- wide county load. As we expand statewide, Hyland's operational procedures must improve as they have greater impact to business operations and participants.	 Performance and stability of the imaging processing has continued to improve Enhanced performance test in progress ahead of the LA County Imaging Migration Recent results at twice expected volumed have demonstrated performance in line with expectations Operational Processes are being reviewed to identify opportunities to reduce human error previously encountered
258	The CalWIN Conversion Cutover Window is at-risk of completing past the 84-hour cutover window	The CalWIN Conversion Cutover Window is at-risk of completing past the 84-hour cutover window	 Development of cutover schedule in progress and on track to be completed by the end of the month Wave 1 Mock Conversion results to be leveraged to reassess the risk

Updates on Key Risks Risk Level: High

Risk #	Risk Name	Risk Description	Mitigation Plans / Status
263	Converted Data Test (CDT) defects not resolved prior to CalWIN UAT start could impact the user experience for User Acceptance Test (UAT) participants	Converted Data Test (CDT) is experiencing a higher than projected (planned) volume of defects. CDT defects will need to be tested prior to the scheduled completion of CDT or mitigated prior to the planned execution start of CalWIN UAT. Defects not tested and closed could result in a schedule slippage of CDT and/or UAT and impact the county participants experience during UAT.	 High priority conversion defects have been aligned with GDS 6, which is planned for delivery at the end of March for UAT preparation activities Additional resources have been added to the conversion team to increase the focus on defect resolution CDT Testers have been embedded with the Conversion team to enable earlier testing of defect fixes and improve fix reliability Contingency plans are being developed in case the risk is realized as an issue
268	Implementation Readiness for CalWIN Cutover to CalSAWS	If implementation readiness (project and county) is not on track to meet their respective exit criteria by 04/29/2022, then the CalWIN Wave 1 cutover to CalSAWS could either be delayed or require significantly greater support to help counties through outstanding issues. Individual risks have been opened related to the ability to be fully ready in time for a successful CalWIN Wave 1 cutover to CalSAWS on October 27, 2022 and subsequent waves. This risk serves as an overarching risk for the overall readiness of the project and CalWIN counties to cutover to CalSAWS.	 Mitigation steps are being developed for each of the risks related to CalWIN readiness Team is establishing measurable, formal checkpoints to determine exit criteria are on track to be met or if adjusments or other options need to be taken Detailed Contingency Planning is underway in the event the risk is realized as an issue
269	CalWIN Counties may not have enough development and testing timeline to Refactor their Ad- hoc Reports and Ancillary System before Go-Live	The CalWIN Counties need time in the schedule, leading up to their respective Go-Live, to Refactor Ad-hoc Reports and/or Ancillary Systems. To do so, the counties need connectivity and access to CalSAWS environments, data model (and definitions), as well as data. The current CalSAWS delivery schedule (of these) is compressing the CalWIN counties Design, Development, and Testing timelines (i.e., schedule) and putting their County Readiness for Go-Live at-risk.	 Access to the CalSAWS environments and data models will be accelerated in the schedule to allow more time for the CalWIN counties to perform impact analysis Inventories of existing CalSAWS reports and dashboards will be shared with the CalWIN counties to promote reuse across the teams Team is evaluating additional support options for the CalWIN counties as well

Updates on Key Risks Risk Level: Medium

Risk #	Risk Name	Risk Description	Mitigation Plans / Status
262	The CalWIN counties may not be fully prepared for go-live if they do not have sufficient or timely information	The CalWIN counties and County Directors have voiced concern that they do not have sufficient information or direction from the CalWIN ISS team to adequately prepare for go-live. In some cases, they have begun creating their own materials based on what they understand. If the counties do not have a framework within which to prepare, they may not be ready for cutover. This includes clear communication and timelines for what is needed to be completed by when, readiness checklists, early conversations on the transition from the current state to the future state, and clear direction.	 Accelerate the completion of the following: Implementation Work Plan for ISS Workstreams and for the Project workstreams which impact CalWIN Counties (T-12) County-Specific Implementation Work Plan (T-12) County Readiness Checklist (T-10) County Technical Readiness Checklist, either in the main checklist or a standalone checklist, as provided by the technical team and validated by the ISS teams (T-10) Implementation Readiness Dashboard and Packet (T-6) Green Light Governance (meeting cadence starts at T-5) Implementation Lead Toolkit – Complete Communications Toolkit – Ongoing Training Toolkit – In Progress Coordinate the project dependencies and timelines that assist counties in planning their readiness activities – January 2022 Accelerate the assignment of dedicated Implementation resources to begin working immediately with Wave 1 counties after the Implementation framework is in place
264	CalWIN County waves may not complete their Imaging migration readiness activities by their designated wave go-live dates	Delays in CalWIN counties predecessor activities (such as securing external legacy vendors for export support, mapping document types for each county, using Snowball as data transfer method, and completing the test batch phase on time) may delay cutover dates within each county. Further, counties must complete their predecessor activities by the deadline if they want to start exporting/importing on time. As a result of early pitfalls associated with predecessor tasks, Wave 1 counties have experienced delays, including delays in establishing contracts with external vendors, incorrect mapping, and failures to complete initial testing activities on time, which are putting their respective go-live dates at risk.	 Communicate lessons learned with each wave, such as, contracting early with external vendors and following AWS recommended data transfer methods (Over the Wire transfer is currently the preferred approach) Use project tools such as Forumbee to provide immediate feedback and guidance Share CIT/Email with counties about best practices learned from C-IV/LA migrations Implement tracking templates with the counties to facilitate reporting on the delivery of images, including burndown charts for each county for tracking mapping progress and imaging export/import progress

Updates on Key Risks

Risk Level: Medium

Risk #	Risk Name	Risk Description	Mitigation Plans / Status
267	GA/GR UAT and County Data Validation functionality may be delayed past May 2022	If all required CalSAWS GA/GR EDBC/CC functionality is not delivered by May 2022 then the GDS to support UAT, County Data Validation may not contain all of the GA/GR automation or converted GA/GR data.	 Additional resources have been added as well as additional requirement collaboration sessions to accelerate the completion of remaining design activities Accelerated turnaround timeframes for CRFIs to obtain county input Expedite the design of data model changes for conversion activities Collaborate with UAT team to adjust schedule to based on May delivery and evaluate contingency options to accommodate any changes delivered after UAT commences
270 New	The CalWIN counties may not be fully prepared for Go- Live if there is insufficient information in the Organizational Change Management (OCM) Change Discussion Guides (CDGs)	If OCM does not have sufficient documentation and resources to create CDGs, and counties do not have adequate time to review and provide feedback, the CDG delivery timeframe and level of detail might be impacted. The OCM team uses the County To-Be Process documentation as an input into the CDGs. Requirement DEL-11 states that CDGs must capture tasks within each job process, steps the person in the role will complete once they begin utilizing the new System, and impacts to the 18 CalWIN Counties along with the steps that the person will stop completing once they begin utilizing the CalSAWS System. If County To-Be process documentation does not capture this information, more work must be done on the CDG content to make it useful for counties. The Training team leverages the CDGs by linking roles and changes to related training content and depends on receiving accurate CDGs in the expected timeframes.	 Conduct working sessions with county staff and system Subject Matter Experts to review County Change Discussion Guides: Provide guidance to the Counties for the purpose and process for review and feedback. The Process Change Inventory should be refined to ensure that the following information is captured: Current State Future State Change Impact Affected County-Specific Roles Clearly document all changes to county processes with sufficient details and impacts to county staff roles in the Process Change Guides. Validate the CDGs with county representatives.

Multi-Factor Authentication (MFA) Rollout



Multi-Factor Authentication Updates



Roll out Completed

- End of January completed the rollout to county users.
- MFA is enabled for all CalSAWS services





Tips

Reminder: 20-minute time outs when in CalSAWS

Multi-Factor Authentication Enhancements



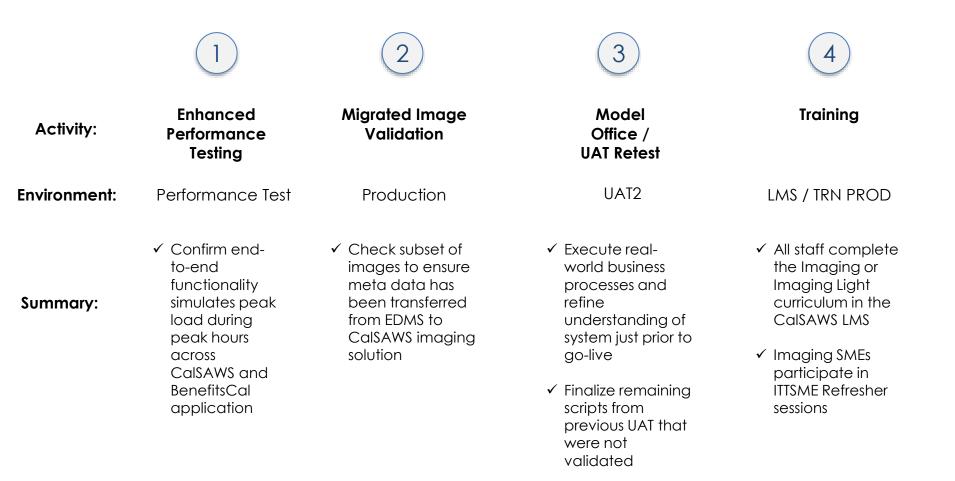
Feedback Received

- Received feedback from the counties on improvement points for the implementation
 - MFA Policy Enhancement to reduce # of MFA requests per day
 - + SCR-CA 240973
 - Consistency across CalSAWS applications for 20-minute time out(e.g session management for Imaging, Qlik)
 - + SCR-CA -240974
- Team is analyzing potential solutions to address the feedback received
- Work with Counties to continue to improve experience

Update on Production CalSAWS Imaging Solution and Preparations for L.A. County Migration



Imaging Update Current and Upcoming Activities

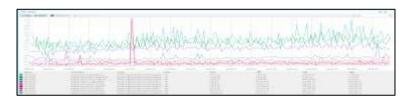


Imaging Update Enhanced Performance Testing

- Enhanced Performance Testing team executed a successful load test on 58-county load.
- Additional test scheduled
- Results below as of 2/8/2022

CalSAWS API Response Times

Simulate back-end load from BenefitsCal, CalSAWS, and kiosks.



Hyland UI Response Times

- Average response times ranged from 100ms-2.5 seconds
- BenefitsCal confirmed response times much improved; observed 188ms average CalSAWS API response times

Simulate end-user front-end experience (e.g., user clicking capture in the interface, opening an image)

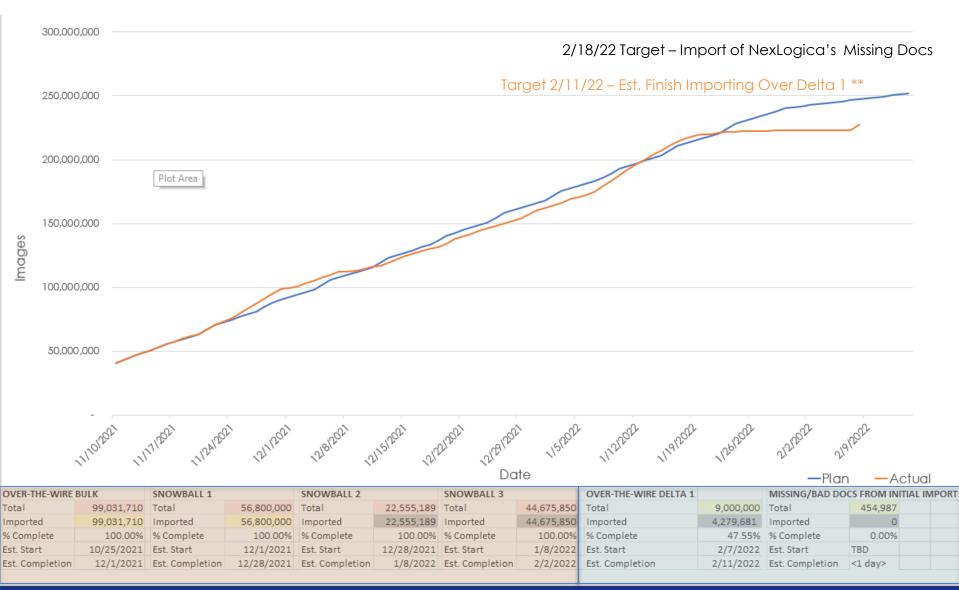
Avg. UI Response time			
Load	Doc. View	Capture	Case Summary
100%	2.7 sec	5.9 sec	2.8 sec

- Response times significantly improved across key scenarios at 58-county load
- Hyland confirmed database load steady throughout test

Imaging Update Current Production Issues

- Document Visibility: CA-235845, CA-240446 (2/11/22)
 - Subset of restored documents were impacted by a system defect which resulted in 42,000 documents not accessible/visible by end users
 - Additional safeguards/alerts configured for prevention
- Document Searchability: CA-239493 (2/16/22); CA-239725 (3/4/22); CA-237374 (3/11/22)
 - Subset of person level documents do not show up in search results when searching for document by case number in the "All Case Archived" search or images button links
 - Socket Timeouts encountered during "All Case Archive: Captured by User by Dates" search filter
 - Case number is blank on subset of linked E-Apps
- Delays in Workflow: CA-237631 (2/11/22)
 - Elongated System/Workflow Queue Processing Times
- Impacts to Usability: CA-237731, CA-235399 (2/16/22); CA-233988 (2/18/22); CA-228869 (2/25/22); CA-236075 (3/4/22); CA-233990 (3/11/22)
 - Enable OCR Override/Split Override option at point of scan
 - Mass Route of documents out of exception queues to archival
 - Intermittent Image display issues with Internet Explorer resulting in grey screen
 - Intermittent CSRF param token errors
 - Users unable to re-index legacy documents
 - "Returned Mail" intermittently being marked received

Imaging Update Document Migration Import Burn-Up



Imaging Update UAT/Model Office

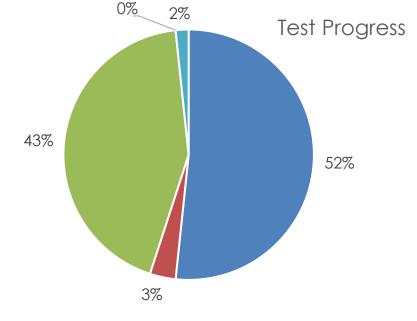
Similar to County Validation for individual releases. This is an opportunity to test end-to-end imaging business processes prior to March Go-Live in a "Production-like" environment

LA County Staff will Test End-to-end Imaging Functionality:

- Test user security rights
- Batch scanning and workflow queue validation
- Test physical scanners
- Test report refreshes
- Imaging report access (Exception Queue Aging, Initial QA, and Documents Captured)
- Test document routing rules (task generation)
- Marking documents received
- BenefitsCal document flow
- Imaging auditing
- Retest UAT scenarios (3 failed and 4 updated scenarios based on system enhancements)

Imaging Update UAT/Model Office - Los Angeles County Testing Progress

- Model Office/County Validation
 - 60 County Developed Scripts*
 - 31 started
 - + 26 passed
 - 0 failed
 - 1 withdrawn
 - CalSAWS Imaging Reports delivered on 2/7/22

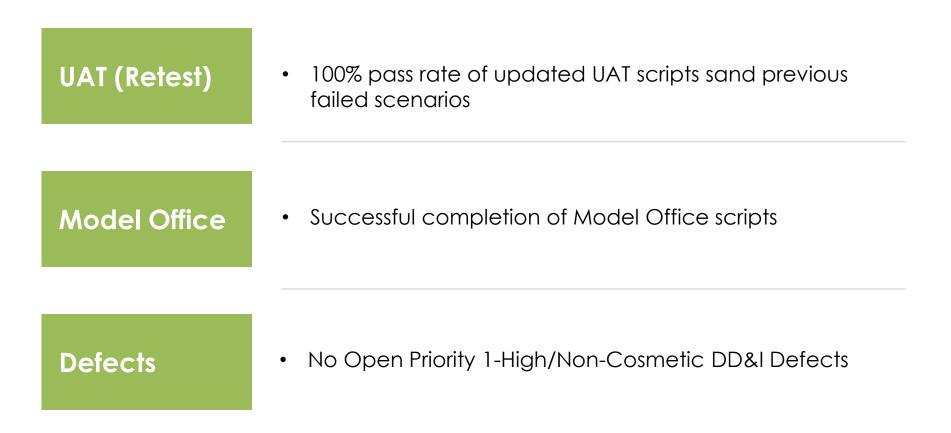


Started Not Started Passed Failed Withdrawn As of 2/4/2022

- Imaging UAT (Retest)
 - 3 retests from original UAT
 - 4 new scripts based on new functionality since original UAT

*Scripts reviewed by CalSAWS Imaging team and feedback provided.

Imaging Update UAT/Model Office Success Criteria



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

WBT Module	Lessons	Est. Duration	Interactive
Navigation	Accessing Imaging FunctionalityPerceptive Experience User Interface	• 20 min	
Overview	 Scan Modes Queues Drawers Imaging Annotations Images & Tasks Coversheets & Separator Sheets 	• 30 min	
Single Case Capture	Single Case CaptureIgnore Barcode Scan Mode	• 30 min	Х
Multi-Case Capture	Multi-Case Capture	• 40 min	Х
Virtual Printer Capture and Import	Virtual Printer CaptureFile Upload Mode	• 30 min	Х
Document Retrieval	 Searching Process, Searching Options & View Rights 	• 30 min	Х
County-Maintained Workflow Queues	Exception RoutingNon-Standard ProcessesOther County Documents	• 40 min	Х
Return Mail Capture	Return Mail Capture	• 30 min	Х
Specialty Scan Modes	SIU, Hearings & RDB Scan modesOther County Departments Scan Mode	• 50 min	Х

Imaging Web-Based Modules (WBTs)

At LA County DPSS' request, the LMS will also contain an "Imaging Light" curriculum made up of three WBTs.

WBT Module	Lessons	Est. Duration	Interactive
Navigation	Accessing Imaging FunctionalityPerceptive Experience User Interface	• 20 min	
Overview	 Scan Modes Queues Drawers Imaging Annotations Images & Tasks Coversheets & Separator Sheets 	• 30 min	
Document Retrieval	 Searching Process, Searching Options & View Rights 	• 30 min	Х

The Project will produce two training reports that will be generated from the LMS and shared with the R6 Regional Managers via email on a weekly basis

Training Report	Description	Format
Imaging Curriculum Report	Shows DCFS and DPSS completion rates for the Imaging and Imaging Light curricula	MS Excel
Imaging WBT Completion Report	Shows DCFS and DPSS completion rates for the individual Imaging WBTs	MS Excel

Imaging Update Additional Training Materials

CalSAWS Imaging Guides

Based on WBT Content (LMS)

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

CalSAWS Fact Sheets

(Web Portal)

- Imaging
- Imaging Search Results
- Imaging Workflow Queues

Videos

Upcoming (Will be available in the LMS once published)

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

Imaging Training: Imaging Train-the-SME (ITTSME) Refresher

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 & 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
- Change Network Champions

Prerequisites:

- Imaging WBTs (required)
- Imaging Quick Guides (recommended)

Content:

- Imaging functional demonstrations
- Hands-On Practice
- Facilitated Q&A
- Information on Training and 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 022-004 Request for ITTSME Refresher Participants** provides additional details – distributed January 10, 2022.

Update on Preparations for L.A. County Migration to BenefitsCal



LA County Readiness for BenefitsCal Go Live Status Update

Area	Category	WE 02/04/22	WE 01/28/22	
Application	County Validation – Execution 97%		46 %	
Application	County Validation – Pass Rate 76%		93 %	
Integration	Interface Partner Test	100%	100%	
	Infrastructure	100%	100%	
Technical	Security Testing	60%	20%	
	Performance Testing	esting 80%		
	CBO Conversion Readiness	100%	100%	
Conversion	CBO Converted Data Test	100%	100%	
Training	Training Plan	100%	100%	
	Training Materials	100%	40%	
	Training Delivery	75%	10%	
Implementation	Prod Deployment Plans	50%	25%	
Change	Communications	50%	20%	
	Partner Readiness (County, etc.)	90%	20%	

NS	Not Started	G	On Schedule	Y	<14 Days Late	R	>=14 Days Late	с	Complete
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LA County Readiness for BenefitsCal Go Live Communication Progress

Communications	Timing (Weeks from go-live)	Target Date	Status
LA to confirm which communications to send + any text changes to the comms	7 weeks	01/26/22	Complete
BenefitsCal to send for language translation	7 weeks	02/18/22	In Progress, Incremental
CalSAWS to provide distribution lists (emails, phone numbers, language preferences)	7 weeks	02/18/22	In Progress, Incremental
BenefitsCal team to schedule distribution within AWS Pinpoint	6 weeks	02/25/22	In Progress
(If desired) LA to send physical letter	5 weeks		

LA County Readiness for BenefitsCal Go Live Training Progress

Training Sessions	Timing (Weeks from go-live)	Proposed Date	Status
Train the Trainer Session, includes Tier 1 Support Session (CSC, Helpdesk)	6 weeks	02/01/22 02/02/22	Complete
ForgeRock Delegated Admin training		02/07/22	Complete
Awareness session for Community Based Organizations	4 weeks	02/23/22	Upcoming

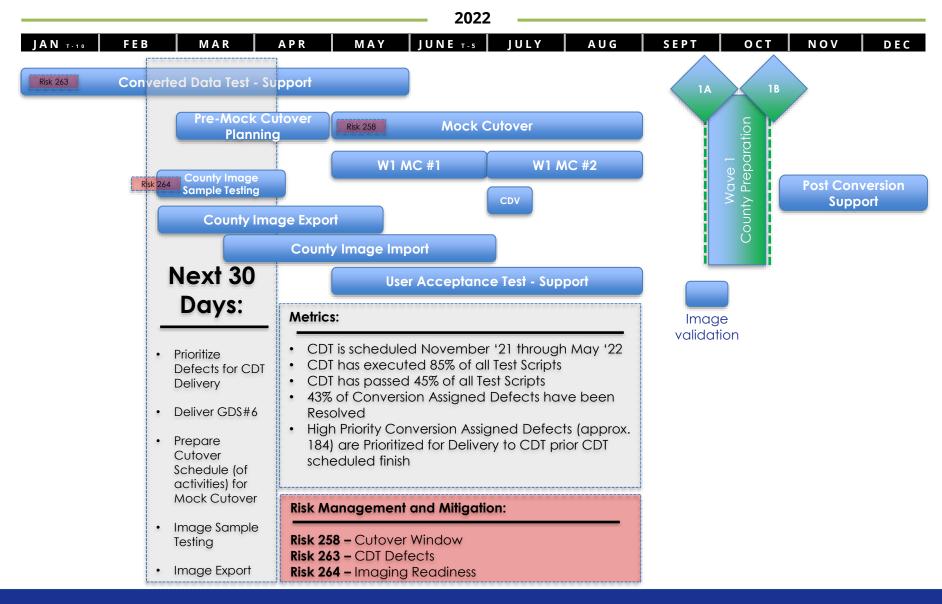
LA County Readiness for BenefitsCal Go Live Post-Go Live Support

Greenlight	Start	End
Daily System Health Check Emails	Ongoing	Ongoing
Q&A calls: Daily - County staff/leadership to call in with questions	03/14/22	03/25/22
 Q&A calls: Twice Weekly County staff/leadership to call in with questions 	03/28/22	04/08/22

CalWIN Wave 1 Implementation Readiness Status and Milestones

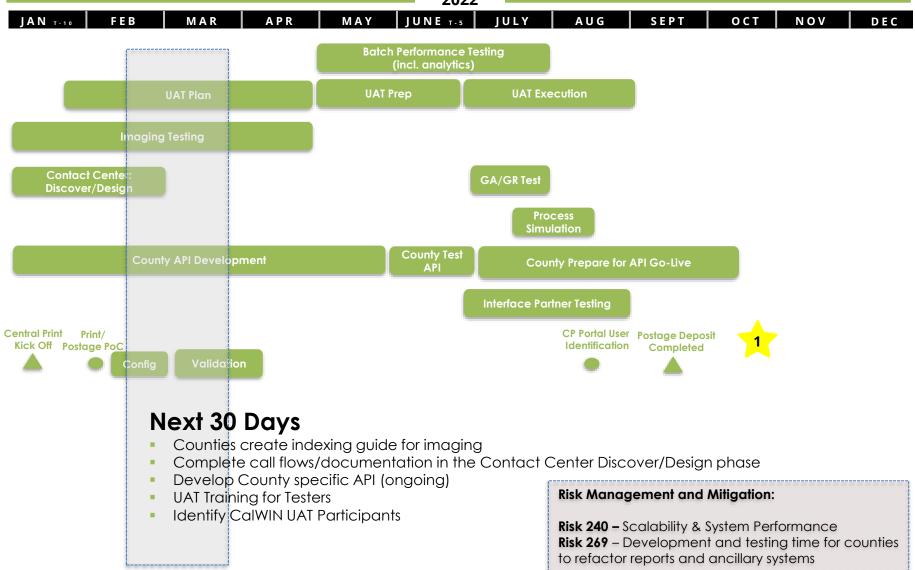


Conversion Readiness 30 Day Look Ahead

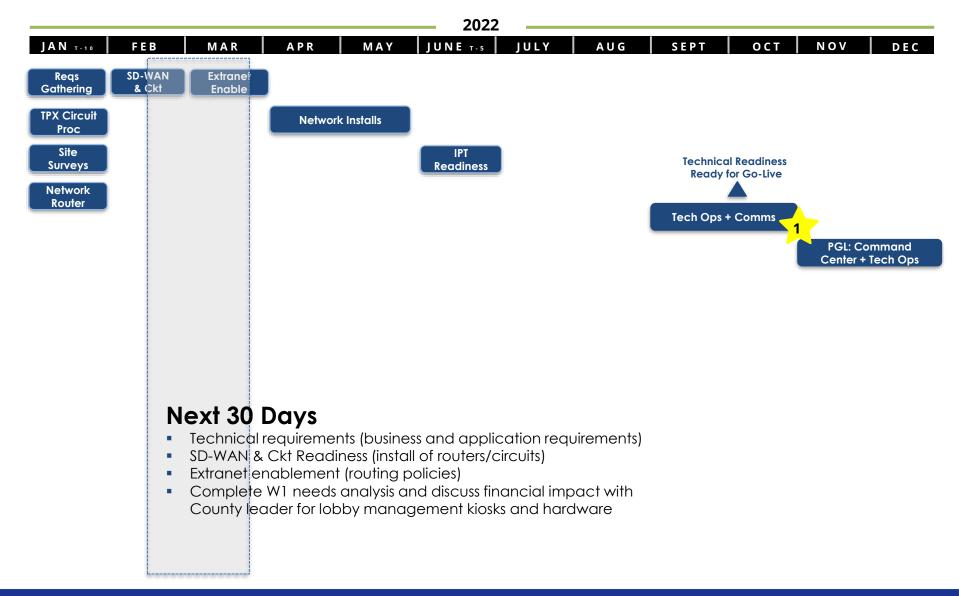


System Readiness 30 Day Look Ahead

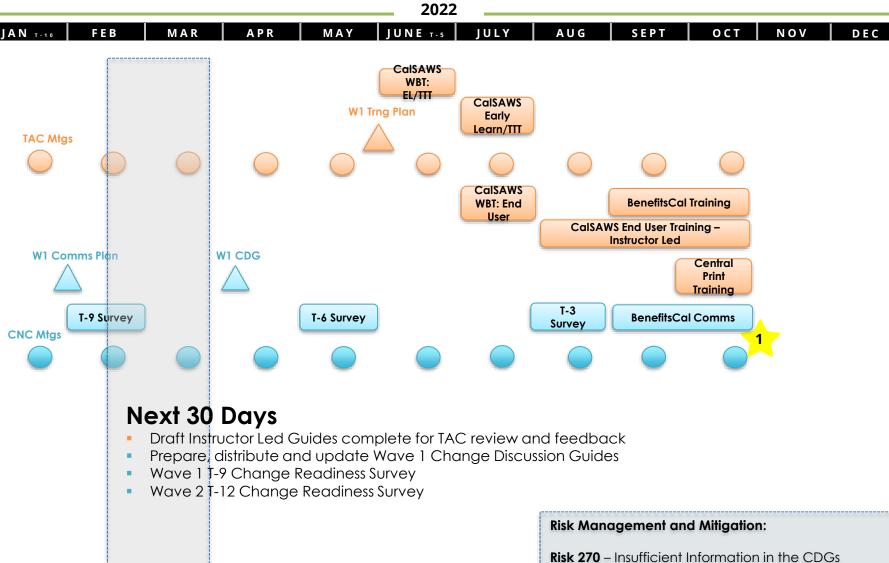
2022



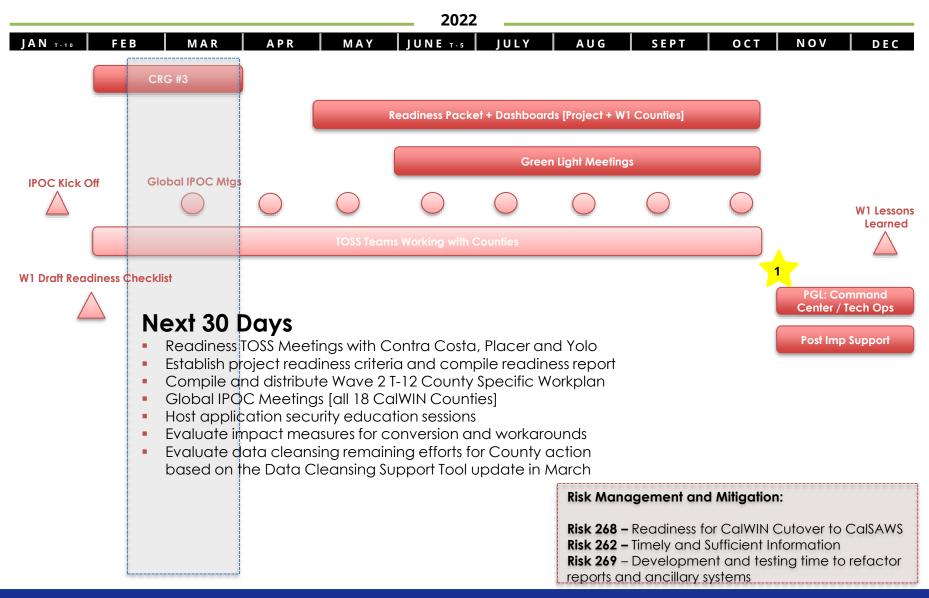
Technical Readiness 30 Day Look Ahead



Organizational Readiness 30 Day Look Ahead



Destination: 58 Counties 30 Day Look Ahead



CalSAWS Release Update



ARPA (American Rescue Plan Act) funding Approval Received, Work Starting

- ARPA funding was approved on 2/8/2022.
 Current funding is available through 9/2022.
- What is included:
 - Release of Information (ROI) is a top priority and is a challenging effort to implement in September. (To accommodate this important initiative, some 4.0 items will move to later releases)
 - Communication/Marketing Campaign for BC
 - Archetype-based application for Students
 - CBO Referral Code (linked to ROI)



ARPA Funding Changes to BenefitsCal Release 4.0

To accommodate the focus the short timeline to utilize the current ARPA funding, some functionality previously identified for 4.0 will need to move due to the focus on ROI and other ARPA activities:

- ABAWD moves to TBD due to the waiver being extended to 6/2023
- New functionality Support Requests, CalWORKs 2.0, GROW/GR employment related services, time clocks move to later releases.
- Two-Way Messaging and Enhanced Chat remain in 4.0

CalSAWS Release Updates Look back





Baseline Release: January 24, 2022

- ACL 20-145, 20-146 Eliminate ESAP SAR 7 Requirement and Update ESAP NOAs
- MEDIL I 21-03 Update Delivery of Asset Verification Reports
- Pro-rate CF Minimum Allotment for CE/MCE Households
- GA GR changes for the 18 CalWIN counties

Priority Releases:

- Issued over \$1.2M in CF replacement benefits for December power outages in 14 counties
- Issued over \$250M in CF emergency allotments across the 40 counties
- Safe Drinking Water Pilot Informing Notice sent to eligible
 households in Kern County





February 2022

Baseline Release 22.02: February 21, 2022

- Expand access to Medi-Cal to all eligible Californians 50 and older, regardless of immigration status
- Updates to eHIT interface
- MC Post Partum Care Expansion expand coverage from 60 days to 12 months

Priority Releases:

- Run Batch EDBC for CalFresh SSA COLA effective 03/2022
- Run Batch EDBC on active ESAP cases to update the reporting type and remove the SAR 7 reporting type
- Execute a one-time process to transition eligible individuals from 60 days to 365 days post partum coverage
- Issue the CF emergency allotments across the 40 counties for January 2022
- Issue the Safe Drinking Water Approval NOAs for eligible individuals in Kern County
- Deploy Spanish translations for certain state forms





March 2022

Baseline Release 22.03: March 21, 2022

- ACL 20-113 / 20-120 CalWORKs 60-month time clock and WTW 24-month time clock - CalWORKs time clock changes
- ACL 21-130 CalWORKs increase to the Applicant Earned Income Disregard from \$90 to \$450 per employed person
- ACL 21-140 CalWORKs pregnancy special need increase from \$47 to \$100
- GA GR changes for the 18 CalWIN counties

Priority Releases:

- Run Batch EDBC for FPL COLA
- Deploy changes to support LA County cutover to Imaging and BenefitsCal
- Issue the CF emergency allotments across the 40 counties for February 2022
- Deploy Spanish translations for certain state NOAs



<u>April 2022</u>

Priority Releases:

- ACL 19-76 CalWORKs Change in Earned Income Disregard (EID) 2022 – increase from \$550 to \$600
- ACL 21-140 Run Batch EDBC for Pregnancy Special Need (PSN) Increase
- Deploy changes to support BenefitsCal 3.0
- Issue the CF emergency allotments across the 40 counties for March 2022



In Development

Q

<u>May 2022</u>

Baseline Release 22.05: May 23, 2022

- Increase asset limits for Non-MAGI programs
- ACL 21-109 Two Year OP/OI Establishment and Calculation Timeframe CalWORKs/CalFresh
- GA GR changes for the 18 CalWIN counties

Priority Releases:

- ACL 19-76 Run batch EDBC to apply the 2022 Earned Income Disregard
- Issue the CF emergency allotments across the 40 counties for April 2022



In Design and Development

IAPDU Submission Update



CalSAWS IAPDU Submission Update



 The IAPDU includes a request for additional funding for changes such as: vendor transition, personnel updates, hardware/software updates, expanded BenefitsCal hours, vendor integration hours, and other M&O updates

CalSAWS Procurement Update

• Vendor input results



CalSAWS M&O Procurement Update Summary of Vendor Input

 Feedback received from 5 vendors on January 21 on the Infrastructure requirements and SOW, the M&E requirements and SOW and the 7 procurement approach questions.

	Vendor Response Summary to Requirements and SOWs							
		Requirements		SOWs				
	Firm	Infrastructure Comments	M&E Comments	Infrastructure Comments	M&E Comments			
		Comments	Comments	Comments	Comments			
1	Peraton	17	0	2	0			
2	InfoSys	11	32	9	12			
3	Deloitte	18	28	9	7			
4	Accenture	42	25	6	3			
5	Gainwell	0	0	0	0			
	Total	88	85	26	22			
	Grand Total	173		48				

CalSAWS M&O Procurement Update Procurement Approach Questions

- 1. In a multiple contractor environment, how would you propose addressing potential redundancies in scope of work between and across multiple contractors?
- 2. In a multiple contractor environment, how would you propose addressing potential ambiguities regarding which of multiple contractors was responsible for a specific scope of work?
- 3. In a multiple contractor environment, what recommendations would you make to address conflicts among contractors regarding responsibility for specific scopes of work?
- 4. In a multiple contractor environment, how would you propose structuring contractual warranty and indemnification obligations to ensure there are no gaps in coverage in light of potential redundancies or ambiguities in scopes of work between multiple contractors?
- 5. Are you less likely to bid based on the complexities you see in the requirements and SOWs? If so, what additional recommendations would you make regarding this procurement?
- 6. Would you be less or more likely to bid on a procurement with consolidated Infrastructure and M&E SOWs and requirements? Please explain why.
- 7. Please provide any additional input you would like for the Consortium to consider.

CalSAWS M&O Procurement Key Procurement Tasks

- 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.

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 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.

January 27, 2022, JPA Member Representatives Meeting – Facilitated discussion to obtain feedback





January 2022 JPA Member Representative Conference

What stood out in your mind from the January 27, 2022, JPA Member Representative Conference?



3

1

Was there too much, too little, or just the right amount of information shared?

What would you like to see presented at the June 23, 2022, JPA Member Representative Conference?

Getting There Together!

Update on Key QA Activities



Update on Key QA Activities Los Angeles County Cutover



Monitoring Imaging Operations and Performance

- Performance Testing and Tuning
- Exception Queues and OCR Success Rates
- Training: Imaging Best Practices and Searching of Queues
- Post Go-Live Support, Defect Resolution

Monitoring BenefitsCal Readiness

- YBN to BenefitsCal Policy Changes, Clarifications, and Communications
- Independent Testing
- Training
- Post Go-Live Support



Update on Key QA Activities CalWIN Cutover to CalSAWS

- Tracking Converted Data Test Defect Resolution
- 84-Hour Cutover Window
- Golden Data Sets (GDS)
- County Data Validation Testing
- County Preparation Activities, Timeframes, and Materials
- County Activities for Imaging (legacy extracts/mapping)
- System and Process Validation, Participation, and Coordination
- County Staff Levels
- External Factors (Fire, COVID, etc.)
- Post Go-Live Support

Focused on Overall Quality and the County and Public Experience

CalWIN Conversion

Project

and County Readiness

Update on Key QA Activities CalWIN Cutover to CalSAWS

CalWIN UAT

- Timing of Data (GDS), CDT Defects, and GA/GR Features
- UAT Script Preparation
- County Participants

Batch Performance & Ops

- CalSAWS Counties Plus Upcoming Waves
- Scaling/Tuning Batch to Stay within 10-Hour Window
- Batch Communications for 58 Counties

Contingency Planning

- Conducting Cross-Risk Contingency Planning
- Exploring Options in the Event Adjustments are Needed

Focused on Overall Quality and the County and Public Experience

Update on Key QA Activities Maintenance and Upcoming Releases

Independent Testing

- CalSAWS Releases
 - + Policy Updates, Enhancements, and Fixes
 - + GA/GR Rules and Correspondence

BenefitsCal Releases 3 and 4

- + Language Translations
- Two-Way Chat, Reporting, CBO Features
- Integration of BenefitsCal, CalSAWS, and Imaging
- Security Reviews
- CalSAWS SLAs and Release Performance
- OCAT SLAs and Release Management



Update on Key State IV&V Activities



Update on Key IV&V Activities Key Activities being monitored by IV&V

	Imaging Stability and Performance	 Production defect resolution Performance test results 			
	Los Angeles County cutover - Imaging and BenefitsCal	 User Acceptance Testing (UAT) Preparation activities including training and communications 			
	CalWIN Converted Data (CDT) Testing	 Defect resolution and risk mitigation activities Golden Data Set (GDS) development 			
~~~	Batch Performance	<ul><li>Batch performance improvements</li><li>Production batch window</li></ul>			
××××	CalWIN Implementation Readiness	<ul> <li>UAT planning and preparation</li> <li>County communications</li> <li>Training preparation</li> <li>BPR and OCM activities and deliverables</li> </ul>			
	Development and Implementation	<ul> <li>CalSAWS and BenefitsCal releases</li> <li>Post implementation support</li> </ul>			

#### State Partners Updates

- OSI
- CDSS
- DHCS



# **Regional Updates**



# Adjourn Meeting

