



5

Breakout Session 5
Finishing the Journey Strong:
Post-Implementation Support



Waves of Change

Agenda

- ① Welcome and Introductions
- ② Session Overview
- ③ Pre-Go-Live Support, including Activities and Support Leading to Go-Live
- ④ Post Implementation Support
 - A. In County Support
 - B. Virtual Support
 - C. Help Desk Model
 - D. Automated Case Reviews
- ⑤ Panel Discussion
- ⑥ Q&A with Audience
- ⑦ Breakout Session Survey



Ground Rules

1. Mute audio/video unless speaking.
2. If you have a question, please raise your hand and wait to be acknowledged before coming off mute.
3. Wait until all content is presented before asking verbal questions.
4. Questions in chat will be monitored and most will be addressed during Q&A.
5. Keep speaking and questions to 2 minutes.



Introductions

Post Implementation Support - Presenters



Yong Vangbliayang
*CalSAWS
Implementation
Manager*



**Cathryn van
Namen**
*Deloitte
Implementation
Manager*



Kristina Carter
*Accenture
Technical Lead*



Paul Trisler
*CalSAWS
Conversion Lead*



Gretchen Williams
*ClearBest
Executive
Specialist &
Moderator*



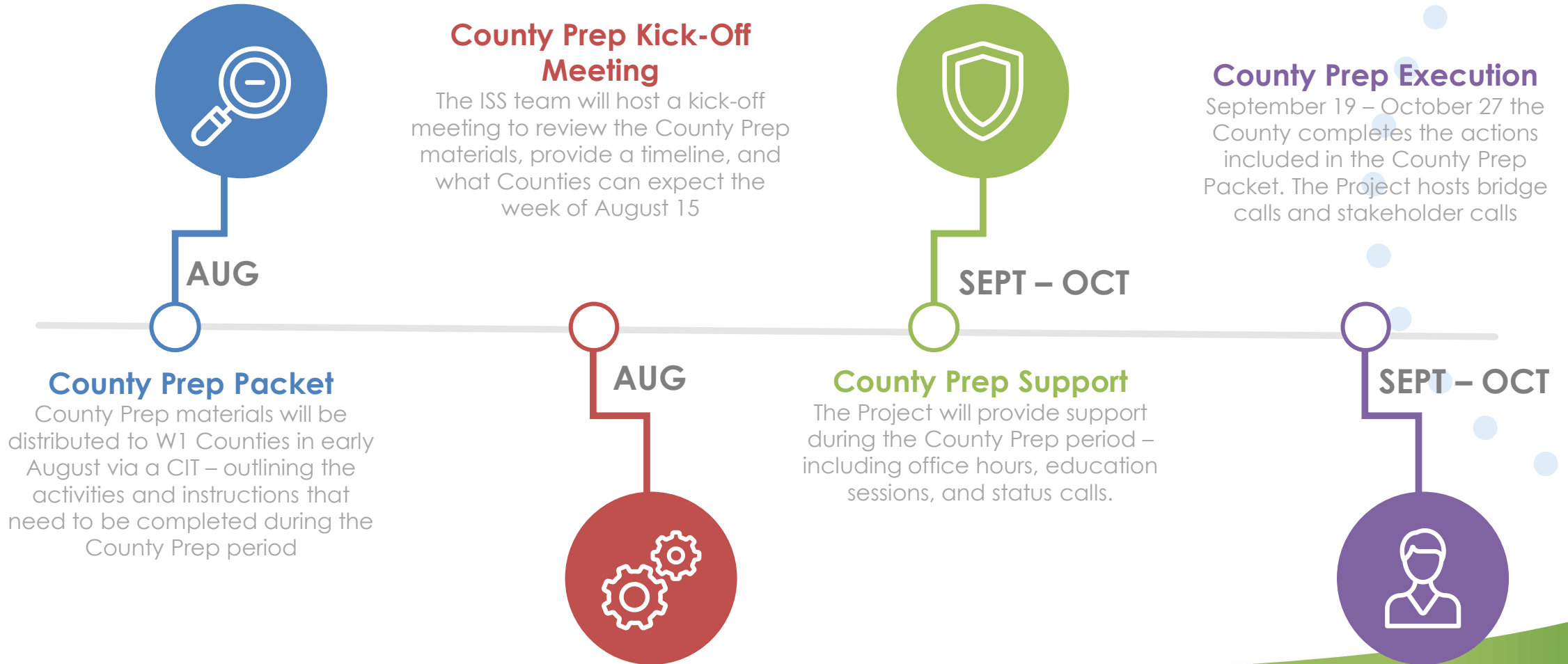
Pre-Go-Live Support



Waves of Change

Pre-Go-Live Support

Project Support for County Prep Phase





Post Implementation Support



Waves of Change

Post-Implementation Support

In-County Support

Targeted On Site Support (TOSS)

The TOSS teams are providing over the shoulder support for Counties (in-person or hybrid) to answer questions, provide valuable migration information and be a resource for County staff.



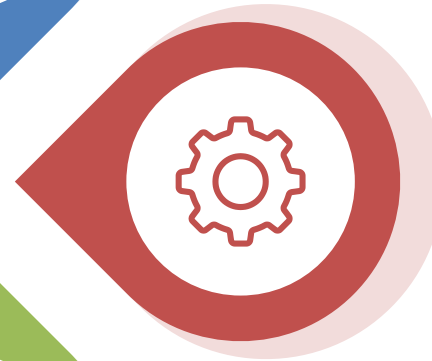
CalWIN Staff

Support from the County points of contact (Implementation, Technical, etc.) and the Change Network Champions support County staff with additional layers of expertise and CalSAWS knowledge.



Functional Project Subject Matter Experts (SMEs)

The CalSAWS Project, Functional SMEs, and Regional Managers are available to provide concentrated support for County-specific needs.



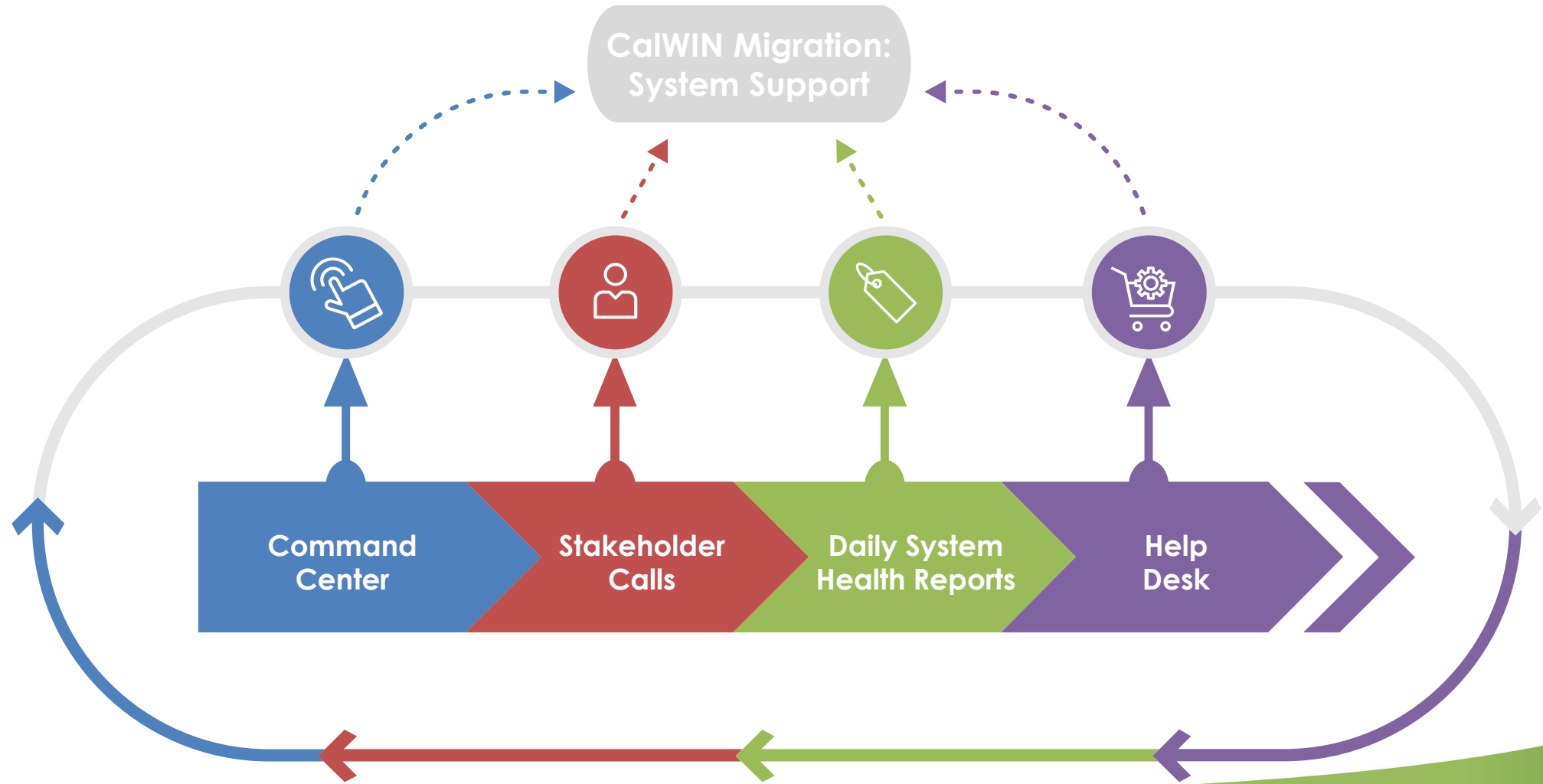
CalSAWS Counties Support

Learning from other Counties working in CalSAWS will provide additional support to Counties with applicable feedback and guidance from Counties.



Post-Implementation Support

System Support to Guide the CalWIN Migration



Post-Implementation Support

Self Support Available for Staff



01

CalSAWS Environments

Utilizing system knowledge and practice



02

INFOGRAPHICS

Valuable information provided through the Organizational Change Management team is a resource for key changes, system highlights and available resources.



03

MIGRATION TOOLBOX

A full toolbox of available resources for staff to ease the transition and equip staff knowledge of the system.



04

LMS RESOURCES + WEB BASED TRAININGS

The learning journey map and available job aides hosted on the LMS can provide additional how-to and guidance to staff.



05

GO-LIVE PACKET

A compilation of important CalSAWS information and support resources that will further assist staff for Go-Live.

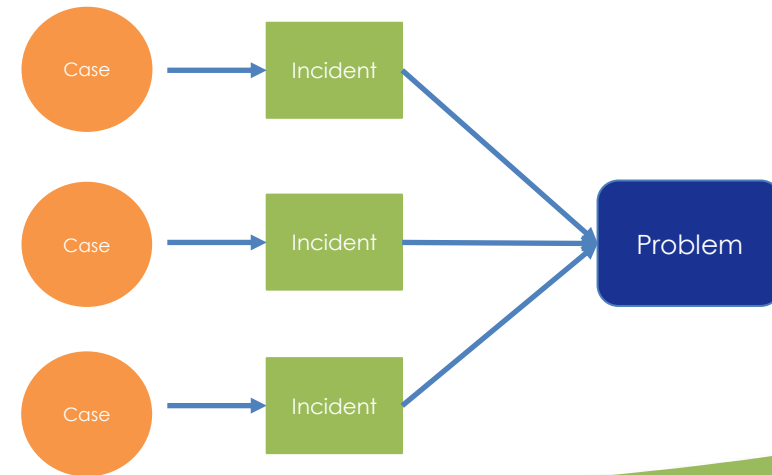
Post-Implementation Support

System Support – CalSAWS ServiceNow Ticket Types

The CalSAWS Helpdesk structure is organized into three tiers of support.

- **ServiceNow-Case** – Issues are first reported to ServiceNow as a ServiceNow-Case. Tier 1 works ServiceNow-Cases, consists of County Helpdesk or CalSAWS Helpdesk
- **ServiceNow Incident** – If Tier 1 is unable to resolve a ServiceNow-Case they escalate to an Incident, which is worked by CalSAWS Project groups as Tier 2 and if needed Tier 3.
- **ServiceNow Problem** – Incidents reporting the same issue are linked to one Problem, where the underlying cause of the issue is investigated and resolved by Tier 3

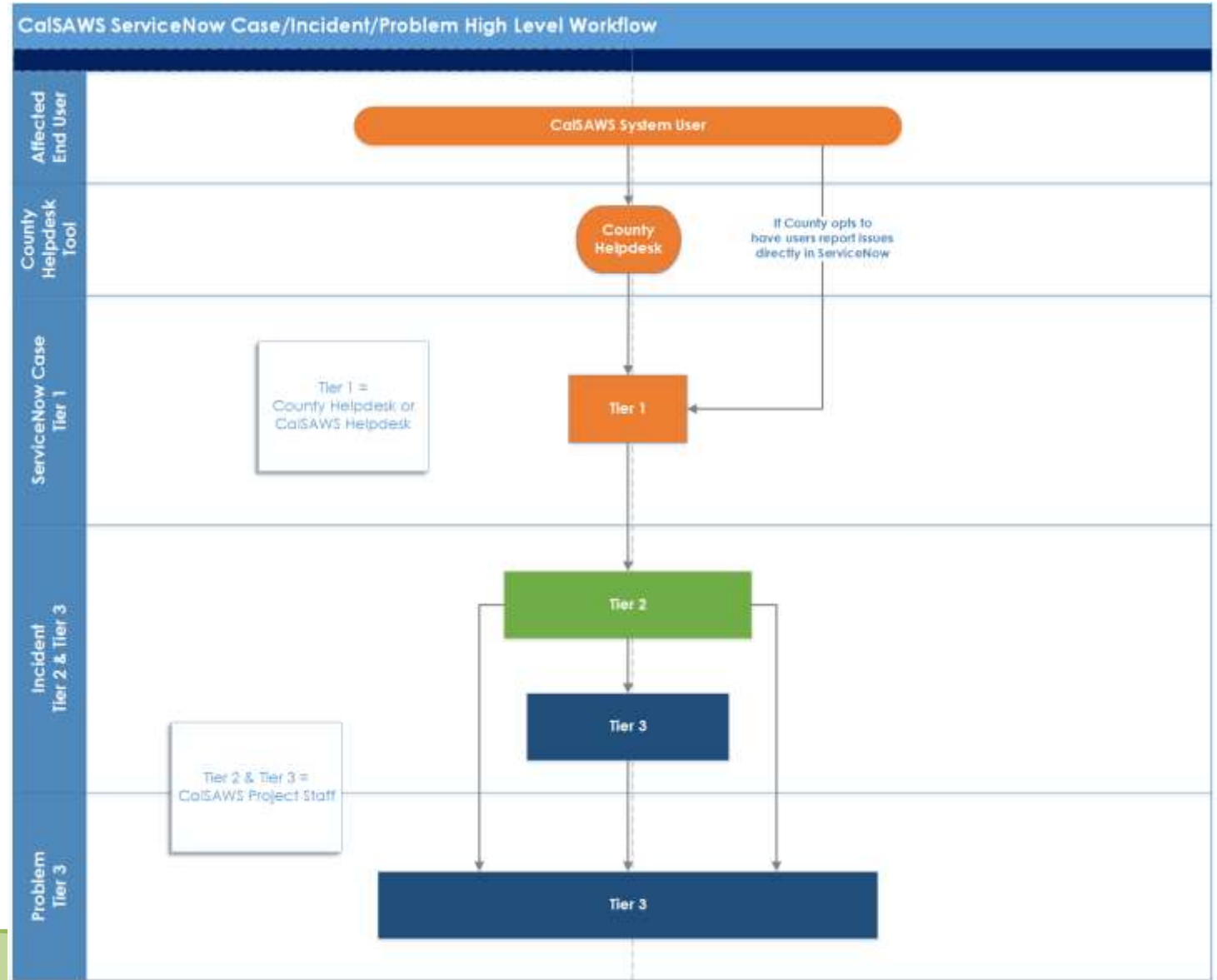
When a Problem is resolved, the associated Incidents and their associated ServiceNow-Cases are automatically resolved with the resolution.



Post-Implementation Support

System Support – CalSAWS Helpdesk Tiers

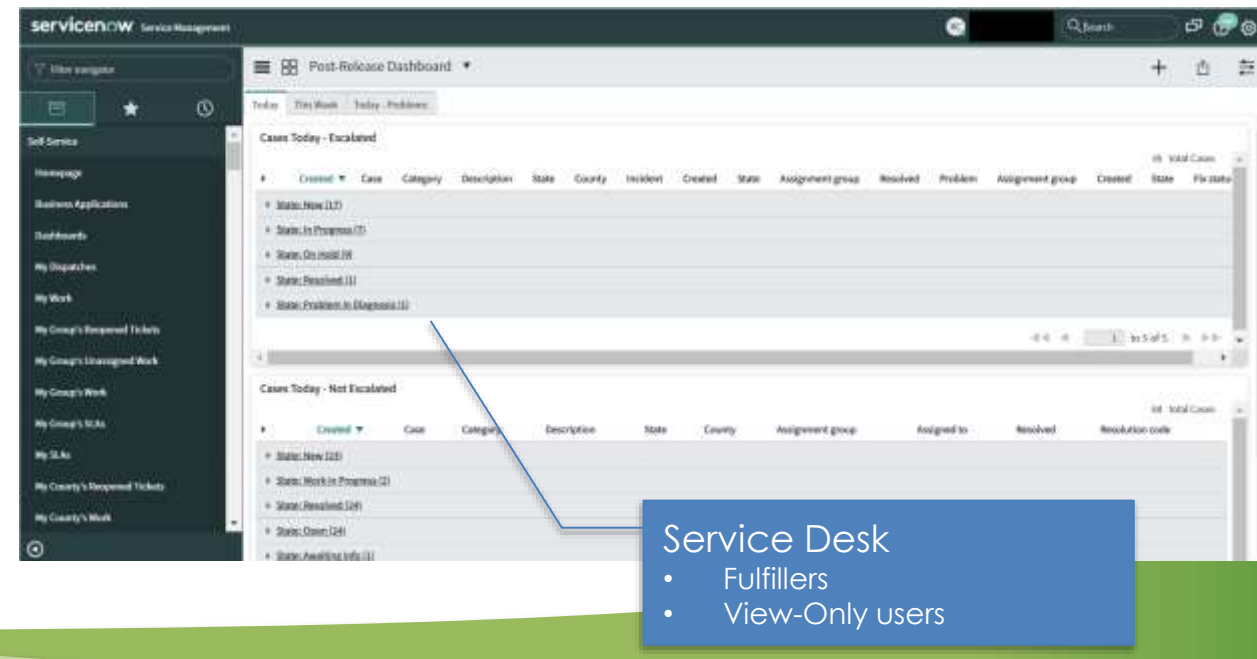
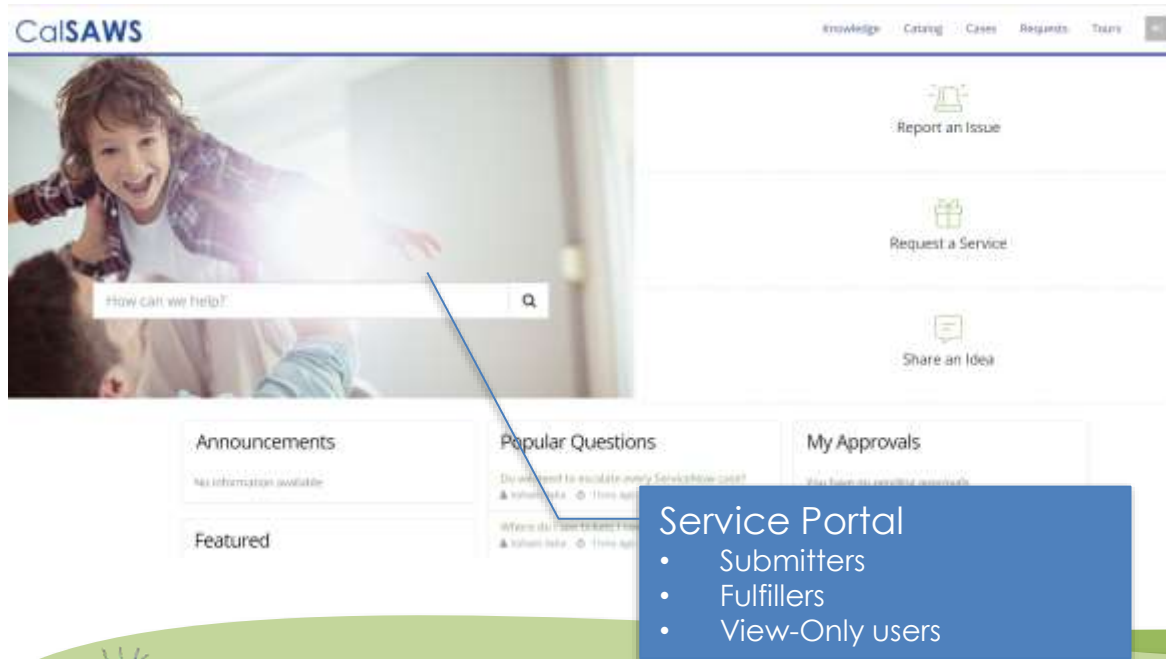
The CalSAWS Helpdesk structure is organized into three tiers of support.



Post-Implementation Support

System Support – ServiceNow User Types

- **Submitters:** Can submit ServiceNow-Cases.
- **Fulfillers:** Have the same rights as Submitters and can update/re-assign/resolve/escalate ServiceNow tickets.
 - Members of Tier 1, Tier 2 and Tier 3 groups are fulfillers
- **View-Only Users:** (coming soon) Have the same rights as Submitters and can view ServiceNow tickets and reports.



Post-Implementation Support

System Support – Applications Support in CalSAWS ServiceNow

CalSAWS ServiceNow can be utilized for support for any of the following:

- CalSAWS Application Environments
- Imaging
- BenefitsCal
- Contact Center
- Learning Management System (LMS)
- OCAT-CalSAWS application interface
- Child Care Portal



Post-Implementation Support

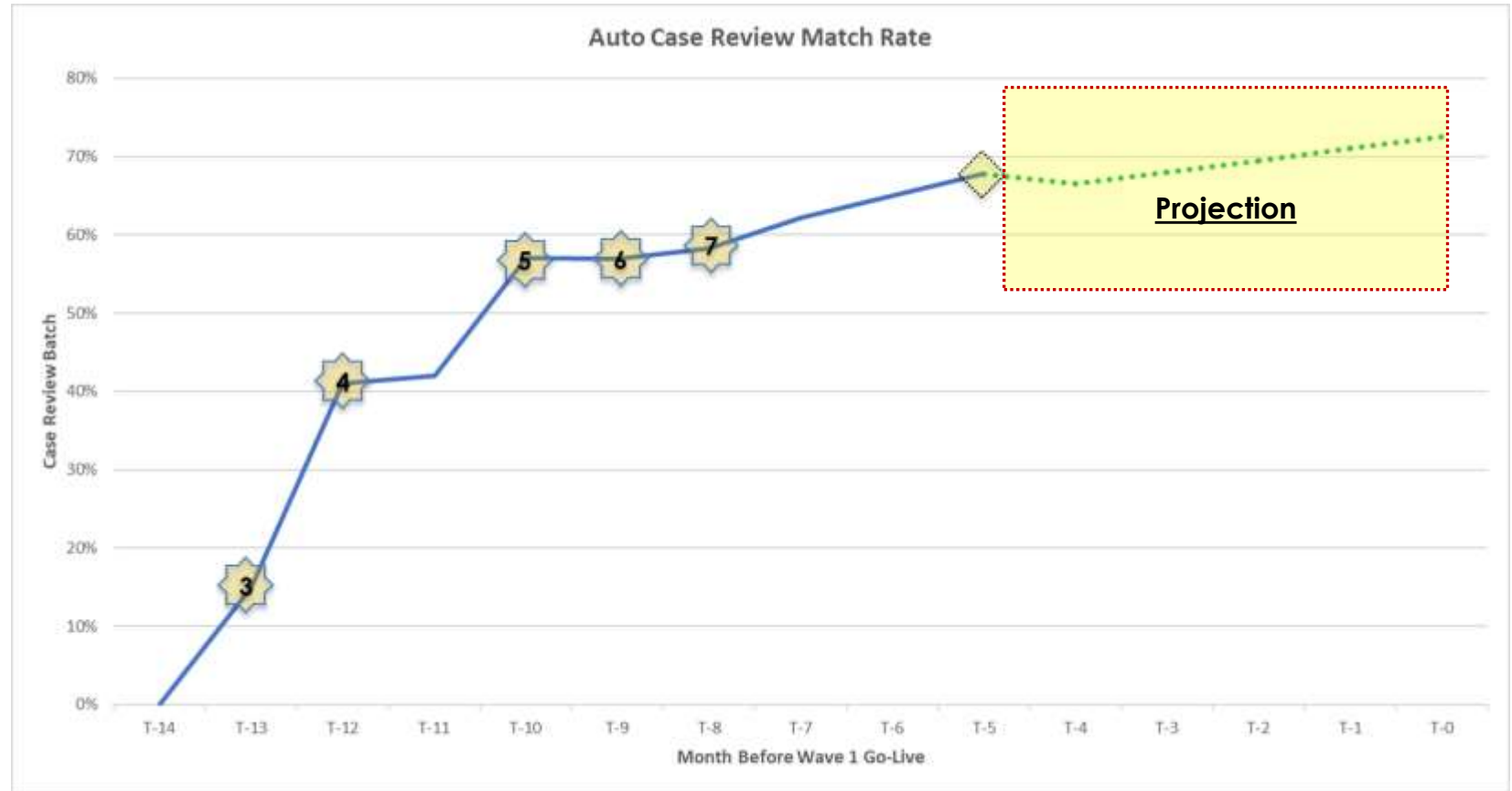
Automated Case Review – Yellow Banner Cases

- Comparisons with **prior implementations**
 - ISAWS to C-IV (2009): ACR = 0% (ACR process did not exist)
 - LEADER to LRS (2015): ACR = 72% (for Pilot go-live)
 - C-IV to CalSAWS (2021): ACR = 86% (high rate due to very similar data models)
- Cases requiring County Case Review (25%-30%) will have a “**yellow banner**” on the Case Summary page
- **CalWIN benefits will roll forward** while cases are awaiting case review
- ISS Team can help **Counties with staffing options** to review cases, using each county’s Manual Conversion funding allocation
- Generally, counties will have **several months to review cases**, however, in some cases, COLA runs will require review of some cases to be expedite
- Future waves will **see improved ACR rates** as lessons learned from prior waves get applied

Post-Implementation Support

Automated Case Review – Yellow Banner Cases

- High Confidence to achieve **ACR rates similar to previous conversions**
- About 25% of the ACR fallout is due to active Medi-Cal (MC) programs that would otherwise Discontinue but are protected by the **Public Health Emergency (PHE)**



Post-Implementation Support

Automated Case Review – Yellow Banner Cases

- 98% of Programs Run EDBC successfully
 - 2% Exceptions which will be Repaired before Go-Lives Begin
- 68% Match Rate Currently
- 29% Mismatch Rate Overall
- Individual Program Match Rates have Improved Significantly

Case Review Batch	11/8/21									6/1/2022
	Assembly Run	GDS#3	GDS#4	GDS#5	GDS#6	GDS#7	5/10/2022	5/25/2022		
CaWIN County Data	Wave 1	Wave 1	Wave 1	Wave 1	Wave 1	Wave 1	Wave 1	Wave 1	Wave 1	Wave 1
Total Programs Executed (Ran EDBC)	260,456	264,153	282,892	283,313	280,705	296,984	287,783	289,731		93,563
Total Successfully Ran*	98%	49%	97%	97%	96%	96%	99%	99%		98%
Match (overall)	41%	15%	42%	57%	57%	58%	62%	65%		68%
<i>CalWORKS</i>	0%	0%	0%	29%	20%	28%	47%	42%		56%
<i>CalFresh</i>	0%	0%	1%	55%	53%	53%	61%	61%		65%
<i>Medi-Cal</i>	56%	21%	58%	61%	61%	63%	64%	68%		70%
Mismatch	52%	32%	27%	37%	35%	36%	35%	32%		29%
Known Business Process	5%	2%	3%	3%	4%	2%	2%	2%		2%
Medi-Cal PHE			25%							
Resulted in Exceptions	1%	51%	3%	3%	4%	4%	1%	1%		2%

Post-Implementation Support

Automated Case Review – Yellow Banner Cases

Mismatch Reason	Description	Priority	Wave 1 Results (68% Match Rate)
Program Discontinued	When EDBC is run in CalSAWS, active Programs in the CalWIN System are resulting in a Program Discontinuance in CalSAWS.	1	33.1% (35,971) ~76% are Medi-Cal Programs (27,344) 8,627 Remain
Recoupment Mismatch	When EDBC is run in CalSAWS, the Recoupment amount in CalSAWS differs from what was determined in the CalWIN System.	1	1.6% (1,714)
Program Person Status Mismatch	When EDBC is run in CalSAWS, the Program Person Status does not match what was determined in the CalWIN System.	1	1.7% (1,863)
Cash Program not Authorized	When EDBC is run in CalSAWS, the CalWORKs Program fails due to a mismatch for the CalWORKs program; therefore, the associated CalFresh (CF) Program also fails.	1	.1% (122)

Post-Implementation Support

Automated Case Review – Yellow Banner Cases

Mismatch Reason	Description	Priority	Wave 1 Results (68% Match Rate)
Program Person Role Mismatch	When EDBC is run in CalSAWS, the Recoupment amount in CalSAWS differs from what was determined in the CalWIN System.	2	.5% (523)
Aid-Code Mismatch	When EDBC is run in CalSAWS, the Aid Code does not match with what was determined in the CalWIN System.	3	35.3% (38,459)
Benefit Amount Mismatch	When EDBC is run in CalSAWS, the Benefit Amount does not match with what previously determined in the CalWIN System.	3	14.9% (16,209)
MAGI Determination Pending	Based off the last CalWIN MAGI eligibility determination on the DER, the EDBC run in CalSAWS results in MAGI Determination Pending for an individual(s).	3	9.8% (10,663)
Full Case Review	EDBC run in CalSAWS is resulting in an uncategorized mismatch reason.	3	3% (3308)
Prior Or Current EDBC Not Found	EDBC run in CalSAWS is unsuccessful due to not having a Prior or Current EDBC in the CalWIN System to compare the benefit match results.	3	0% (0)

Post-Implementation Support

Automated Case Review – Yellow Banner Cases

- Automated Case Review Report is a Point-in-Time EDBC Result Report
- Cases are not "Broken" – CalWIN Benefits Continue in CalSAWS
- Counties have Requested Early Delivery from Mock Conversion
- Automated Case Review Report Produced for County Data Validation *for Each Wave*



Post-Implementation Support

Automated Case Review – Yellow Banner Cases

- Detailed Navigation and Instructions for New CalSAWS Users

Steps to Resolve – Prior or Current EDBC Not Found

- Log In CalSAWS

- On the Homepage, enter the case number and click on the submit button to be directed to the Case Summary page.

Note: This step is not necessary if already in the Case Summary page for the desired case

Screenshot of CalSAWS Page

- In the Case Summary Page, click on the **Customer Information** link, located in the **Eligibility** tab, which will direct you to the Contact Summary page.
- From the Contact Summary page, **Click on the Run EDBC** tab on the left hand navigation bar to access the Run EDBC page.
- From the Run EDBC page, first select the program you wish to run EDBC for. Ensure that the Begin Month and End Month reflect the period you wish to run. Proceed to click on the **Run EDBC** button, which will direct you to the EDBC List page.

- The EDBC List page will list all previous and current program budgets. **Click** on the program hyperlink to open the budget results. In this case, select the Calfresh Hyperlink.
- Review the budget results if the results are as correct and the benefit amount matches the previous CalWIN EDBC budget; click on the **Accept** button at the top of bottom of the page and save the EDBC results. Journal this action per your county's instructions. You are complete, no further action required. In this case, the amount of **\$721** is correct, and no further action is required.

If the budget results do not match the previous CalWIN EDBC budget, proceed to **Step 8**.

Post-Implementation Support

Panel Discussion

Hear from our experts on important questions, gain insights from their perspectives, and learn from their experience with prior efforts.



Introductions

Post Implementation Support – Panelists



Lynn Perez
*Napa
Deputy Director
Self Sufficiency
Service Division*



Jennifer Marks
*Humboldt
HNS Operations
Analyst &
Backup PPOC*



Mike Tombakian
*CalSAWS
Help Desk
Manager*



**Ricardo
Maranda**
*CalSAWS
Regional
Manager*



Lisa Salas
*Accenture
Solution Delivery
Manager*



Gretchen Williams
*ClearBest
Executive
Specialist &
Moderator*

Post-Implementation Support



Finishing the Journey Strong: Post-Implementation Support

Morning Breakout Session Survey

Mentimeter Code: **1129 6657**



[Menti Survey](#)

Go to www.menti.com and use the code 1129 6657



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Afternoon Breakout Session Survey

Mentimeter Code: **7112 9333**



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