Cal**SAWS** | JPA Board of Directors Meeting

March 10, 2023

Agenda

1. Call Meeting to Order
2. Confirmation of Quorum and Agenda Review
3. Public Opportunity to speak on items NOT on the Agenda. Public comments are limited to no more than three minutes per speaker, except that a speaker using a translator shall be allowed up to six minutes.

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

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

Action Items

Action Items

4. Approval of Consent Items
   a. Approval of the Minutes and review of the Action Items from the February 17, 2023, JPA Board of Directors Meeting.
   b. Approval of Deloitte Portal/Mobile Work Order No. 11, which includes a request to align M&E hours in the contract to the CalSAWS IAPDU.
   c. Approval of Deloitte CalWIN Implementation Change Order No. 2, which includes additional post implementation support hours offset by reduction in training facilities.
   d. Approval of Accenture Change Notice No. 25, which includes additional hours for post implementation support, technical and security enhancements, client correspondence, imaging of training laptops, ForgeRock support, BenefitsCal environment support, and data growth initiatives, as well as a reduction in hours for innovation lab and central print manager. This Change Notice also one premise item for New Required Notices and STAT 47 Report Modification and several County Purchases.

Informational Items

Brown Act Requirements for JPA, PSC, WCDS Sub-Committee

Brown Act Requirements
CalSAWS JPA, PSC, and WCDS Sub-Committee

- **Traditional Teleconferencing (Gov. Code, § 54953(b)) -** The legislative body may use teleconferencing if the following conditions are met:

  - At least a quorum of the members of the legislative body participates in the meeting from locations within the legislative body's jurisdiction;

  - All votes are by rollcall;

  - Meeting conduct protects the statutory and constitutional rights of the public (e.g., opportunity for public comment, accessible, no disruptions);

  - Opportunity for public comment is provided in a time and manner as typically required by the Act (e.g. after each agenda item and at a separate general public comments time);

  - **Notice is given and agendas are posted in a time and manner as typically required by the Act AND the agenda specifically identifies each teleconference location**; and

  - **Each teleconference location:**

    - **Must have the agenda posted (minimum of 72 hours prior to meeting);**

    - **Be open and accessible to the public for viewing; and**

    - **Provide a means for public comment to be given (e.g., speakerphone).**

Brown Act Requirements
CalSAWS JPA, PSC, and WCDS Sub-Committee

- **Member Just Cause/Emergency Teleconferencing (Gov. Code, § 54953(f)) -** The legislative body may use teleconferencing if the following conditions are met:

  - At least a quorum of the members of the legislative body participates in-person from a *single physical location* (1) identified on the agenda, (2) open to the public, and (3) within the legislative body's jurisdiction;

  - Either (a) a two-way audiovisual platform or (b) a two-way phone *and* live webcasting is provided for the public to observe and electronically address the legislative body;

  - The posted agenda includes information on how the public can electronically observe the meeting and electronically give public comment;

  - The posted agenda provides an opportunity for public comment at times typically required by the Act, including electronically (e.g., after each agenda item and at a separate general public comments time);

  - The legislative body takes no action during a disturbance in the electronic access that prevents the public from observing the meeting or giving public comment;

  - Public comments are not required to be submitted in advance;

  - A member of the legislative body participating electronically has not done so for more than three consecutive months or 20% of the regular meetings within a calendar year;

  - A member of the legislative body may only participate electronically if they (1) participate through both audio and visual technology, (2) disclose the presence of any person over 18 years old in the room and his or her relation, and (3) one of the following apply:

Brown Act Requirements
CalSAWS JPA, PSC, and WCDS Sub-Committee

- A member of the legislative body may only participate electronically if they (1) participate through both audio and visual technology, (2) disclose the presence of any person over 18 years old in the room and his or her relation, and (3) one of the following apply:
  - *Just Cause*
    - They are prevented from attending in-person due to (a) caregiving needs of a child or certain family member, (b) contagious illness, (c) needs related to certain physical or mental disabilities, or (d) travel on official business of the legislative body or public agency;
    - They notify the legislative body at the earliest opportunity and provide a general description (< 20 words) of the just cause circumstances; and
    - They may not participate remotely for "just cause" more than twice per calendar year.
  - *Emergency Circumstances*
    - They are prevented from attending in-person due to a physical or family medical emergency;
    - They notify the legislative body as soon as possible, provide a general description (<20 words) of the emergency circumstances, and request to participate electronically; and
    - The legislative body grants the request to participate electronically. This must be done separately for each meeting.
  - Note: there is no requirement that the remote location be disclosed on the agenda or open to the public for "just cause" or "emergency" participation.

Wave 2 Go Live Debrief

- Contra Costa, Santa Clara, and Tulare Experience
- Migration Statistics & Update

Wave 2 Post Go-Live Updates

- **System Highlights (CalSAWS & BenefitsCal):**
  - No major issues to report
  - System performance remains normal
  - Benefit Issuance is occurring normally
  - Priority issues are being triaged through twice daily calls and addressed based on impact and urgency

- **County Support Highlights:**
  - No major issues to report
  - Counties are conducting regular business – Intake and Ongoing functions
  - County Support Model remains in place including Onsite and Virtual Support for the first 60-Days Post Go-Live (through 04/28/2022)
  - 431 Virtual Interactions recorded in the first week of Wave 2 Go Live! Majority of interactions are questions regarding Eligibility-MC, CF, CW, System Functionality, and Fiscal/EBT

Wave 2B Cutover Window

Wave 2B Cutover completed within 1 hour of the original forecast with the system available at 8:15am on Monday, 2/27

- Baseline Plan was to Complete the Cutover by Monday, 2/27/2023, 7:30am

- An issue occurred during the conversion process that required additional effort to correct. Initial estimate was a 5 hour extension of the cutover window.

- The remediation occurred in parallel, as the remainder of the conversion process was executed.

- The teams reduced the impact to the critical path to 1 hour:
  - Post conversion activities required 2 fewer hours due to efficiencies gained with upgraded hardware in the production environment
  - County Click-Thru and Wrap-Up was reduced by 2 hours

CalSAWS Release and Policy Update
Wave 2 Cutover Highlights

CalSAWS Core:
- Over 1,800 new users and 1M additional transactions each day
- Over 12,000 tasks completed
- Over $4M in Benefits issued, including Foster Care main payroll for Santa Clara county
- Over 43,000 Eligibility Determination Requests ("EDRs") sent to CalHEERS (including the administrative renewals for May REs)
- Over 73,000 client correspondence generated, include CF NEC NOAs
- Executed nightly batch, including month end and 1st of the month high volume days, for 45 counties within SLAs

Imaging:
- Over 70,000 documents imaged

Contact Centers:
- Over 16,000 calls handled across the three counties

Wave 2 Cutover Highlights

Over 5,000 applications received in BenefitsCal in the first week, 18,000+ accounts created and over 25,000 documents uploaded

Wave 2 Application Metrics Since Feb 27th

Contra Costa County

- 1860 Applications submitted between Feb 27th and Mar 6th
- 277 Changes Reported
- 9985 Documents Uploaded
- 5172 Accounts Created and Linked in BenefitsCal

Santa Clara County

- 2009 Applications submitted between Feb 27th and Mar 6th
- 163 Changes Reported
- 11188 Documents Uploaded
- 4523 Accounts Created and Linked in BenefitsCal

Tulare County

- 943 Applications submitted between Feb 27th and Mar 6th
- 273 Changes Reported
- 7634 Documents Uploaded
- 8746 Accounts Created and Linked in BenefitsCal

Cutover 2C and 3A Update

Wave 2C/3A Cutover Timings
Current Plan for Wave 2C/3A Start and End Times

- **Wave 2C/3A cutover is On-Schedule to begin on Friday, March 10th**

   2C (Closed Cases) / 3A (County Preparation) Cutover:
   - CalWIN (Wave 3 counties) goes down at **6PM Saturday, March 11th**
   - CalSAWS (45 counties, incl. Wave 2 counties) goes down at **8PM Friday, March 10th**
   - CalSAWS (45 counties, incl. Wave 2 counties) up at **6:00AM Monday, March 13th**

Wave 2C/3A Cutover Weekend Schedule
Wave 2C/3A (County Prep Cutover)

	Friday March 10	Saturday March 11	Sunday March 12	Monday March 13
CalWIN Counties (13) + Read Only Counties		NO changes to system downtimes for CalWIN Counties and Customers *Business as usual*		
Orange, Santa Barbara, Ventura		CalWIN Not available beginning 3/11 at 6 PM	CalWIN is available beginning 3/12 at 6 AM	
CalSAWS Customers and CBOs		BenefitsCal is available for anonymous users, known users and CBO users without MFA enabled to submit applications between Friday 3/10 at 8 PM until Monday 3/13 at 6 AM		3/13 at 6 AM Production Available
CalSAWS Production		CalSAWS Production and IVR not available beginning Friday 3/10 at 8 PM until Monday 3/13 at 6:00 AM. Contact Center available (limited) beginning Friday 3/10 at 8 PM until Monday 3/13 at 6:00AM. Imaging is view/read only.		
CalSAWS: LMS, PRT, Sandbox, Training	NO changes to system downtimes for CalSAWS PRT and LMS for CalSAWS County Staff			

*as of 02/21/2023

Riding the Wave

Future Wave Readiness

- Waves 3 and 4 Readiness
- Waves 5 and 6 Risk Summary

Executive Summary: Wave 3 – 4 Readiness
Readiness Areas and Categories [as of 3/3/2023]

Readiness Area*	Readiness Category	Wave 3	Wave 4
Application	Deploy CalSAWS Releases 23.03 or 23.05	G	NS
	Contact Center Readiness	G	G
	Imaging Readiness	G	G
	BenefitsCal Readiness	G	NS
	Central Print Readiness	G	G
	User Acceptance Testing (UAT)	C	C
Integration	County Interface Partner Test (IPT) Execution	Y	NS
	State Interface Partner Test (IPT) Execution	C	NS
Conversion	CDV Defects Resolution	G	G
	EDBC Match – Auto Review Rates	G	G
Technical	County Network Connectivity	G	G
	Performance Testing	NS	NS
Training	Wave County Classroom Set-Up	C	G
	WBT Training Delivery	G	G
	ILT Training Delivery	G	NS
Organization	Change Discussion Guides (CDGs)	C	G
	Communications	G	G
	Business Process Reengineering	C	C
	Configuration	G	NS
	Process Simulation	G	NS
Implementation	Implementation Planning	G	G
	County Prep	G	NS
	Pre and Post Implementation Support	G	NS
	Help Desk	G	G
	County Ad Hoc Reports	Y	G

Readiness Area	Wave 3				Wave 4			
	Orange	Santa Barbara	Ventura		San Diego	San Mateo	Santa Cruz	Solano
Application	G	G	G		G	G	G	G
Integration	Y	G	G		Y	G	Y	Y
Conversion	G	G	G		G	G	G	G
Technical	G	G	G		G	G	G	G
Training	G	G	G		G	G	G	G
Organizational	G	G	G		G	G	G	G
Implementation	Y	Y	Y		G	G	G	G

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

Wave 3 County Readiness Checklist Activities by Status (as of 03/07/2023)

Status	00 All Counties	06 Orange	07 Santa Barbara	08 Ventura	Wave 3 Counties	T:
COMPLETED	11	504	464	449	80	1508
NOT STARTED	2	78	77	77	91	325
IN PROGRESS	0	88	88	96	28	300
Total Unique Issues:	13	670	629	622	199	2133

Wave 4 County Readiness Checklist Activities by Status (as of 03/07/2023)

Status	00 All Counties	09 San Diego	10 San Mateo	11 Santa Cruz	12 Solano	Wave 4 Counties	T:
IN PROGRESS	3	85	87	109	98	7	389
NOT STARTED	1	163	171	163	169	142	809
COMPLETED	27	304	325	309	322	15	1302
Total Unique Issues:	31	552	583	581	589	164	2500

County Readiness Highlights

Wave 3
- *Integration Readiness – County Interface Partner Testing is being monitored. At the time of reporting, Orange has 5 of 7 interfaces passed, Santa Barbara has 7 of 8 interfaces; Ventura has 3 of 4 interfaces passed.*
- *Implementation Readiness – Coordination with Gainwell for prioritized reports. Orange identified 67 reports, Santa Barbara identified 30 reports and Ventura identified 21 reports (working with Gainwell on 9 reports).*

Wave 4
- *Integration Readiness – County IPR readiness is currently behind schedule, however trending down to begin the County IPT testing on 03/15/2023 on schedule.*

Waves 5 and 6 Risks

CalWIN Counties Cutover Readiness Needs Risks

Risk	Risk Name	Wave 5	Wave 6
262	The CalWIN Counties may not be fully prepared for go-live if they do not have sufficient or timely information	Medium	Medium
264	CalWIN County waves may not complete their Imaging migration readiness activities by their designated wave go-live dates	Low	Low
269	CalWIN Counties may not have enough development and testing timeline to Refactor their Ad-hoc Reports and Ancillary System before Go-Live	Medium	Medium
283	Circuit delivery delays to Wave 5 - Fresno County	Medium	

Project Readiness for CalWIN Cutover to CalSAWS Risks

Risk	Risk Name	Wave 5	Wave 6
258	The CalWIN Conversion Cutover Window is at-risk of completing past the 84-hour cutover window	High	High
268	Implementation Readiness for CalWIN Cutover to CalSAWS	Medium	Medium
276	Delivery of Wave 6 GDS #13 in Sept. 2023 (T-1) impacts the Execution of Interface Partner Testing (IPT), Process Simulation, and County Data Validation (CDV) phases for Wave 6 Counties		Medium
285	Preparing CalWIN counties to operationalize CalSAWS after their Go-Live	Medium	Medium
279	CalWIN Counties may not be prepared to reconcile Fiscal and submit State Reports, timely, as they Migrate to CalSAWS	Medium	Medium
280	Unresolved Go-Live Dependent defects not resolved prior to the Wave Go-Live could impact County Case Worker business Post Go-Live	Medium	

CalSAWS Scalability, Performance, and Operations Risks

Risk	Risk Name	Wave 5	Wave 6
237	The scaling of Batch for 58 Counties may have an impact on system performance	Medium	Medium
284	CalSAWS Contact Center Enhanced Call Control Panel (eCCP) application scalability may impact performance for Los Angeles county call volumes	Medium	
240	The scaling of CalSAWS Production Operations, including Batch Operations, to provide 58 County support, without effectively taking into account the multi-county and multi-vendor CalSAWS ecosystem may impact business operations	Medium	
256	Imaging Scalability, Performance degradation, and Operational Process risk may impact the go-live dates for upcoming Counties	Low	

Wave 3B Cutover Timings

Initial 3B Cutover timing is estimated at 92 hours

- ❑ With the performance tuning and hardware upgrade that was implemented with Wave 2, it would have completed within the 84 hour window

- ❑ 3B contains 20% more data than 2B

- ❑ 3B Cutover Plan is being updated with the performance enhancements and lessons from 2B.

- ❑ County Click-through has been restored to 3 hours (it was reduced to 2 hours as mitigation measure for the conversion issue encountered during the 2B Cutover)

- ❑ Additional areas that are being evaluated to reduce the 3B timings are:
    - **Technical opportunities:**
        - » Further ODI Performance Tuning to Tier 1+ conversion logic
        - » Performance tuning on staging of extracted data
        - » Reduce CalSAWS Batch to a more limited schedule on Friday night
        - » Continue evaluation of GoldenGate for use in the conversion load processes
    - **Conversion Sequencing opportunities:**
        - » Execute stage gate reviews in parallel with downstream tasks during cutover

Wave 4 – 6 Go-Live Cutover Timings Projected
Initial Analysis for Wave 4 thru 6

- ❑ **Waves 4 thru 6:**
  - ▪ Wave 4 will contain approximately 40% more data than Wave 2; Wave 5, 50%; Wave 6, 10%
  - ▪ Cutover timings will be revised based on Wave 2 and 3 Go-Live actuals (for assessment and estimating)
  - ▪ Testing of GoldenGate and additional performance tuning of the cutover logic will be ongoing throughout the waves
  - ▪ Mock Cutovers will be executed to confirm the improvements and finalize the Cutover schedule

- ❑ **Next Steps:**
  - » Continue technical validation
  - » Provide updates at monthly PSC and JPA meetings
  - » Provide updates at monthly OPAC meetings for remaining CalWIN Counties
    - • **Wave 4:** By April OPAC meeting, Migration Planning to Draft and present Go-Live Cutover schedule
    - • **Wave 5:** By June OPAC meeting, Migration Planning to Draft and present Go-Live Cutover schedule
    - • **Wave 6:** By August OPAC meeting, Migration Planning to Draft and present Go-Live Cutover schedule

BenefitsCal Update

- Email address requirements
- Support Request Updates/Metrics from Production
- BenefitsCal Technical Service Desk Status

BenefitsCal

BenefitsCal Follows Common Design Considerations for Creating User Accounts

Enhanced User Experience

- Enabling self-service recovery of account access for forgotten passwords (Users having email address can reset the password using "Forgot Password" functionality")

- Does not require users to remember email address separate from user ID

Improved Security

- Requires an email address to establish an account and have access to an individual's CalSAWS account.

- Email is used as a second factor for multi-factor authentication (MFA)

- Phone numbers can be recycled by providers

Operational Benefits

- Create new accounts when they forget their username resulting in multiple accounts for the same household members.

- Using email address, lowers identity license costs by reducing multiple user accounts per customer

Programs Requiring Email to Access Account Information

- Social Security Income, Electronic Benefits Transfer (EBT), Disability Insurance, Unemployment Insurance, Low Income Home Energy Assistance Program (LIHEAP) and Low Income Household Water Assistance Program (LIHWAP), Lifeline, In Home Supportive Services, Child Support, Foster Care Parent Registration

Alternatives Ways to Access Services

- Contacting the county by phone
- Going in person to the local county office
- Submit their application anonymously
- Get assistance from CBOs
- Effective May 2023, certain CBOs may access certain information via the ROI process to provide support

Enhanced Security Measures to Prevent Improper Accounts and Advance Customer Privacy

BenefitsCal

Customers Have Submitted More than 2,700 Support Requests in the First Month

- **Supportive Services**: Child Care, Transportation, School Supplies, Clothing or Uniform, Reimbursement, Other Supportive Services

- **Counseling Support:** Mental Health, Substance Abuse, Recovery, Domestic Abuse, Other Counseling Support

- **Keep your Benefits**: Cure a sanction, Request Good Cause, Request a Domestic Violence Waiver, Request Employment Services Exemptions

Metrics Since Jan 27th

Supportive Services
- 1311 requests between Jan 27th and Mar 2nd

Counseling
- 241 requests between Jan 27th and Mar 2nd

Keeping your benefits
- 1240 requests between Jan 27th and Mar 2nd

BenefitsCal Technical Service Desk

Implementation Status
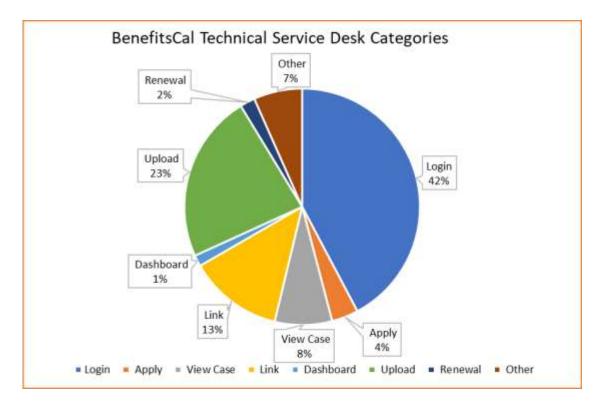
Order of Engagement

- CalWIN Wave 1 – October 31, 2022
- Los Angeles – December 19, 2022
- CalWIN Wave 2 – February 27, 2023
- CalWIN Waves – Remaining CalWIN counties by Wave
- Former C-IV Counties
  - ✦ Individual County meetings underway
  - ✦ Individual Counties in a region may choose to start using the service on or after their Region go live date

Region(s)	On or After Go Live Date
4	March 27, 2023
2	May 30, 2023
3	July 31, 2023
1 and 5	September 25, 2023

BenefitsCal Technical Service Desk

Results since the Los Angeles Go Live

BenefitsCal Technical Service Desk Categories

- Average Incoming Contacts Per Week = 189

- Average Answer Time = 47 Seconds

- Areas to Watch Remain Consistent
  - Login
  - Document upload
  - Linking case

The BenefitsCal Technical Service Desk has been established to provide supplemental technical assistance to CalSAWS Counties in their support of the public and community based organization (CBO) usage of BenefitsCal.
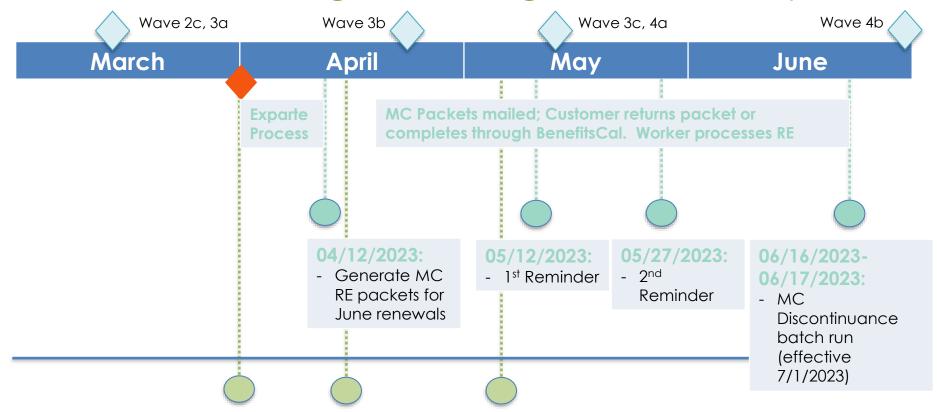
Release and Policy Update

- Continuous Coverage Unwinding
- CalSAWS
- BenefitsCal

CalSAWS Release and Policy Update
Continuous Coverage Unwinding

- DHCS updates
  - Outreach
  - FCC Clarification and MEDIL 23-12

CalSAWS Release and Policy Update
Continuous Coverage Unwinding – Automation Updates

Wave 2c, 3a

Wave 3b

Wave 3c, 4a

Wave 4b

March	April	May	June

Exparte Process

MC Packets mailed; Customer returns packet or completes through BenefitsCal. Worker processes RE

04/12/2023:
- Generate MC RE packets for June renewals

05/12/2023:
- 1st Reminder

05/27/2023:
- 2nd Reminder

06/16/2023-06/17/2023:
- MC Discontinuance batch run (effective 7/1/2023)

03/31/2023:
- Young Adult Expansion: Advance Res
- Incarcerated Adults: Advance REs

04/15/2023:
- Deploy MC RE packet text message campaigns

05/04/2023:
- Deploy additional MC reminder notice changes

All counties begin renewal activities for the first **Medi-Cal Continuous Coverage Unwinding renewals** on 4/2023 for cases with renewal Due Month 6/2023.

CalSAWS Release and Policy Update
Continuous Coverage Unwinding – FCC Clarification

- ## CalSAWS Texting Solution
  - Currently, customers must opt-in and complete a verification process to start receiving text messages
  - Text message campaigns are configurable; they can be turned on/off by County

Opt-In Selection → Opt-In Verification → Text Messages → Opt-Out

CalSAWS Release and Policy Update
Continuous Coverage Unwinding – FCC Clarification

- ## CalSAWS Texting Solution
  - In order to meet the unwinding timeframe, short term changes will be implemented to support the express consent clarification. These changes are targeted for mid April

Opt-In Selection

- One time data change CA-256904: For any phone number listed as type "Cell", a one-time data change will be run to Opt-In the cell phone for texting and set the text message status to "Verified"
- Code changes: For new cell phone numbers added after the data change, update the Contact Detail page logic to Opt-In the cell phone for texting and set the text message status to "Verified"
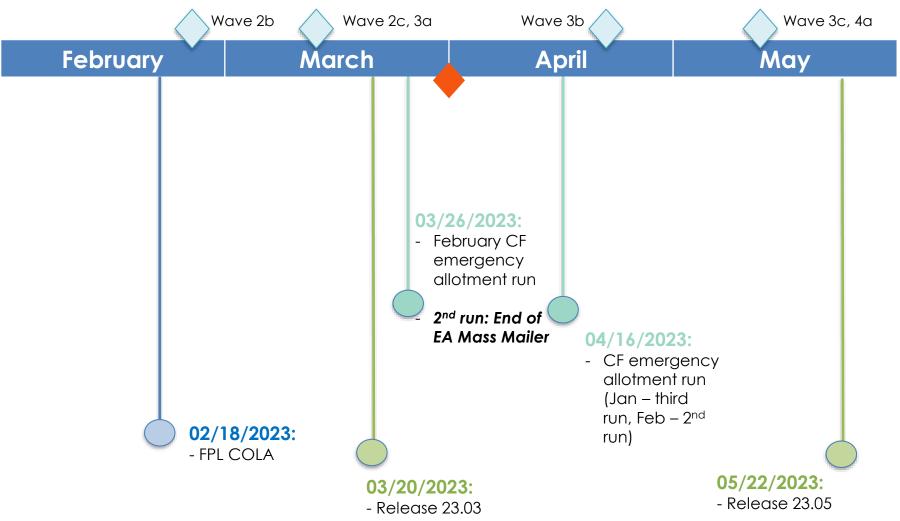- PPM 64196 has been opened in CalWIN

CalSAWS Release and Policy Update
Continuous Coverage Unwinding – FCC Clarification

- ## CalSAWS Texting Solution - Dependencies

  - ### Budget Impacts:
    - ✦ A budget assessment is in process to estimate the cost impact of newly Opt-In customers and projected volume of text messages
    - ✦ Cost estimate will be provided to DHCS and CDSS for inclusion in the CalSAWS budget via SIRFRA 1246. Additional funding is needed to support this change

  - ### System Scaling:
    - ✦ Assessing impact on texting service and system scaling
    - ✦ Reviewing batch impacts and future testing with projected volumes

CalSAWS Release and Policy Update
Upcoming CalSAWS Release Highlights

Wave 2b   Wave 2c, 3a   Wave 3b   Wave 3c, 4a

February	March	April	May

03/26/2023:
- February CF emergency allotment run
- *2nd run: End of EA Mass Mailer*

04/16/2023:
- CF emergency allotment run (Jan – third run, Feb – 2nd run)

02/18/2023:
- FPL COLA

03/20/2023:
- Release 23.03

05/22/2023:
- Release 23.05

All counties begin renewal activities for the first **Medi-Cal Continuous Coverage Unwinding renewals** on 4/2023 for cases with renewal Due Month 6/2023.

BenefitsCal
Upcoming Release Schedule

Winter 2023

⭐ Quarterly CM Meeting

01/26/23

(R 5.0)

▪ Support Requests

2/27/23

(W2)

▪ CalWIN Wave 2 Go-Live

Spring 2023

⭐ Quarterly CM Meeting

4/24/23

(W3)

▪ CalWIN Wave 3 Go-Live

05/25/23

(ROI)

▪ Release of Information

Summer 2023

⭐ Quarterly CM Meeting

06/22/23

(TC)

▪ CalWORKs Timeclocks

7/3/23

(W4)

▪ CalWIN Wave 4 Go-Live

More Highlights for February 2023:
Monthly Release deployed to production on 02/16/23 with seven (7) system improvements including:
- ✓ Admin feature improvements for announcements
- ✓ Opt-in/out feature management
- ✓ Amplitude changes to track more granular data
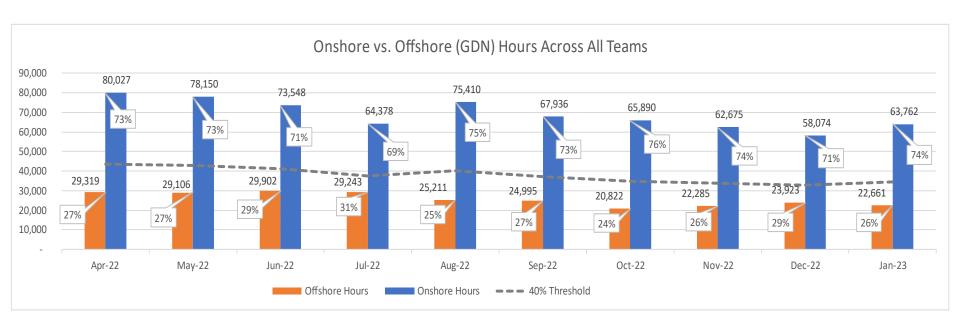
⭐ Quarterly Collaboration Model (CM) Meeting

Technical Operations Update
- CalSAWS Quarterly Quality Metrics
- Production Outage Calendar
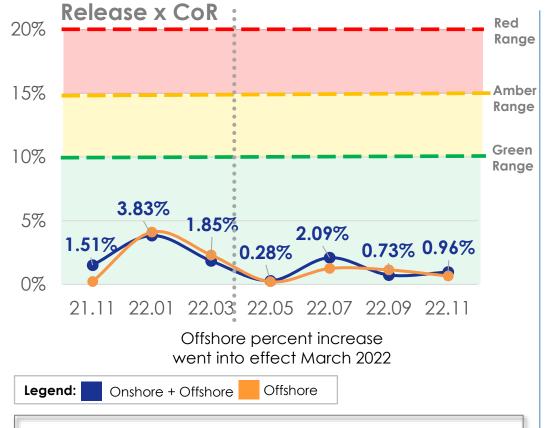- Hyland SLAs

CalSAWS Quarterly Quality Metrics
GDN Workload Balance

Onshore vs. Offshore (GDN) Hours Across All Teams

Month	Offshore Hours	Onshore Hours	Offshore %	Onshore %
Apr-22	29,319	80,027	27%	73%
May-22	29,106	78,150	27%	73%
Jun-22	29,902	73,548	29%	71%
Jul-22	29,243	64,378	31%	69%
Aug-22	25,211	75,410	25%	75%
Sep-22	24,995	67,936	27%	73%
Oct-22	20,822	65,890	24%	76%
Nov-22	22,285	62,675	26%	74%
Dec-22	23,923	58,074	29%	71%
Jan-23	22,661	63,762	26%	74%

Legend: Offshore Hours · Onshore Hours · 40% Threshold

Per Amendment 29 as of March 2022: "Use of GDN resources may approximate 40% of the available hours required for Accenture to deliver its obligations under Exhibit X CalSAWS M&O Extension"

CalSAWS Quarterly Quality Metrics

CalSAWS Application Release Quality Metrics

Release x CoR

Offshore percent increase
went into effect March 2022

Legend: ■ Onshore + Offshore ■ Offshore

TYPICAL RANGES
GREEN: The amount of time being spent on rework is lower than expected. This will enable the project to be completed faster and more efficiently.
AMBER/**RED**: The amount of time being spent on rework is higher than expected. This may impact the delivery schedule.

Cost of Rework (CoR) is the ratio of effort spent performing rework on deliverables to the total effort to Date
(Actual Rework effort Hours/ Actuals To Date Hours)*100

The combined onshore and offshore CoR for CalSAWS code release deployment remains low across releases indicating high quality releases with the additional offshore team

The CoR line graph may increase for the releases if additional defects are found in the future
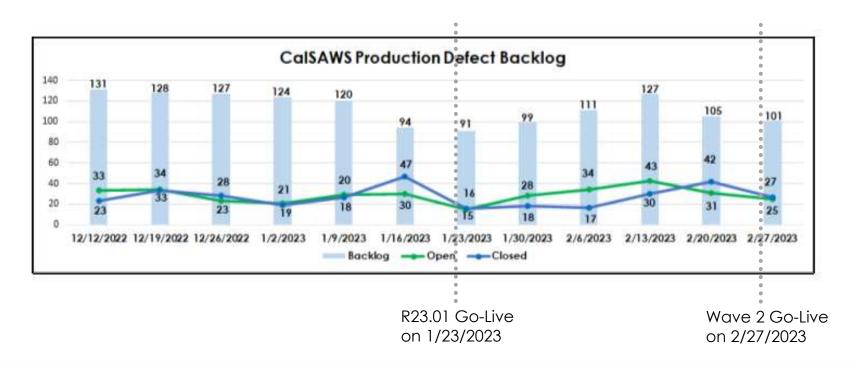
New releases are added after the next release Go-Live and an analysis can be conducted on the previous release. For example, 23.01 COR numbers will be available after 23.03 goes live at the end of March 2023

CalSAWS Quarterly Quality Metrics
Production Defects Backlog

Open production defect rate has remained leveled, demonstrating system stability with no major spikes outside of normal ranges

The Production defect backlog bar-chart depicts the balance of open (unresolved Production defects) and closed defects, week-over-week. Defects are closed upon system test validation and release deployment to Production

CalSAWS Production Defect Backlog

R23.01 Go-Live on 1/23/2023

Wave 2 Go-Live on 2/27/2023

CalSAWS Quality, Defect, Stability, Tickets Stats
February 2023 Major Production Highlights

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	31	1 🟡 2:40pm-5:35pm Reception Log information not visible on Reception Log pages	2 🟢	3 🟢	4 🟢
5 🟢	6 🟢	7 🟢	8 🟢	9 🟢	10 🟢	11 🟢
12 🟢	13 🟢	14 🟢	15 🟢	16 🟢	17 🟢	18 🟢
19 🟢	20 🟢	21 🟢	22 🟡 10:40am – 2:50pm Agents were unable to access CCP, eCCP	23 🟢	24 🟢	25 🟢
26 🟢	27 🟢	28 🟢	1	2	3	4

🔴 Red denotes full System wide outage
🟡 Amber denotes System degradation or component outage
🟢 Green denotes System Available

CalSAWS Quality, Defect, Stability, Tickets Stats
Hyland Imaging Performance Metrics

FEBRUARY 2023 PERFORMANCE STANDARDS

✓ **Monthly Uptime Percentage**
Target: 99.90%
Formula: 1 – (total downtime minutes / total monthly minutes) x 100

Monthly Uptime Target: 99.90%	
Monthly Uptime Service Level Credits	
99.89-99.00%	10% of the Monthly SaaS Fees
Less than 99.00%	20% of the Monthly SaaS Fees
February Actual Uptime	100%
February Service Level Credit	$0.00

Hyland™

CalSAWS Quality, Defect, Stability, Tickets Stats
Hyland Imaging Performance Metrics

FEBRUARY 2023 PERFORMANCE STANDARDS

✓ Monthly Page View Objective

Page View Percentage Target – 90%
The Datacenter will provide viewing access to a 70KB page
<= 2 seconds

Monthly Page View Target: 90%	
Monthly Page View Service Level Credits	
Less than 90%	3.5% of the Monthly SaaS Fees
February Actual Monthly Page View Percentage	99.14%
February Service Level Credit	$0.00

Hyland™

CalSAWS Quality, Defect, Stability, Tickets Stats
Hyland Imaging Performance Metrics

FEBRUARY 2023 PERFORMANCE STANDARDS

Database Transaction Objective

Database Transaction Percentage Target – 90%
Database transactions will be complete in <= 1 Second

Database Transaction Target: 90%	
Monthly Database Transaction Service Level Credits	
Less than 90%	3.5% of the Monthly SaaS Fees
February Actual Database Transaction Percentage	99.90%
February Service Level Credit	$0.00

Hyland™

Contact Center Implementation Update

Contact Center Implementation Update
Timeline/Activities Overview

Key Activities – County Activities are discussed in detail in the Contact Center meetings with the individual counties. These meetings occur following Contact Center Kick-off through go-live.

- Contact Center Kick-Off

- Discovery/Call Flow Design → Call Flow is Approved by County

- Contact Center Decisions/Design → County SCR Approved by County

- Model Office Prep → Script/Test Case Creation, Approach/Staff Scheduling

- Participate in Model Office

- Cutover Activities/County Validation

- Go-Live (aligned with CalSAWS Go-Live)

- Porting of toll-free from County to AWS (Post Go-Live Activity)

Contact Center Kick-Off → Discovery/Call Flow Design → Call Flow Approved by County → Contact Center Design → County SCR Approved by County → Model Office Prep → Model Office → Cutover Activities → CalSAWS Go-Live

Contact Center Implementation Update
Timeline/Activities Overview

Activity	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 6
CC Kick –Off	Complete					
Discovery/Call Flow Design	Complete					In Progress
Call Flow is Approved by County	Complete				In Progress 2 of 3 Complete	Not Started
Contact Center Design	Complete			In Progress		
SCR Approved by County	Complete			Not Started		
Model Office Prep	Complete		In Progress	Not Started		
Model Office	Complete		Not Started			

County activities are discussed and tracked in detail in the Contact Center meetings with the individual counties. They are also tracked and updated weekly on the county workplans. Current timeframes for activities can be found in workplan.

Lessons Learned – Wave 1 and Wave 2

Contact Center WBT Training	Contact Center Training is in CalSAWS LMS. All Contact Center Training is web-based. This is completed when general CalSAWS Training is scheduled.
Model Office Prep	This includes writing of model office scripts for users to execute, planning user approach to model office, scheduling staff and prep review sessions (call flow, reporting, capabilities).
Assign Contact Center CalSAWS Security	There are additional Contact Center security groups in CalSAWS to enable access for agents: **CCP Agent, Call Log View, Call Log Edit**. This is completed when general CalSAWS security is assigned to staff during County Prep Phase.

Contact Center Implementation Update

Training Resources

- Contact Center Training – Available in LMS as part of general training and early training for designated staff.
  - Training Videos and Infographics (also available on CalSAWS Web Portal)
    - Training Videos CalSAWS Web Portal>Resources>Resources by Functional Area>CalSAWS Contact Center>Training Videos
    - Training Infographics CalSAWS Web Portal>Resources>Resources by Functional Area>CalSAWS Contact Center>Training Infographics
  - Web Based Trainings (WBTs)

CalSAWS Web-Based Trainings (WBTs)	
Audience	Course Name
All Non-Contact Center Staff	Electronic Signatures County Staff*
Contact Center Agents – Staff Taking Calls	Enhanced Call Control Panel (eCCP) Agents Electronic Signatures Contact Center Agents* CalSAWS Amazon Connect Overview*
Contact Center Supervisors	Enhanced Call Control Panel (eCCP) Agents Enhanced Call Control Panel (eCCP) Supervisors Calabrio QM Training for Supervisors Electronic Signatures Contact Center Agents* CalSAWS Amazon Connect Overview*
Contact Center WFM/Administrators - Gatekeepers	Calabrio WFM Training: Volume 1 - Schedule Configuration Calabrio WFM Training: Volume II - Schedule Management E-Gain Creating Reports Routing Profiles Set-Up Contact Center Admin Page

Note: Based on county decision and/or business process this course may not be required.

Electronic Signatures CalSAWS

CalSAWS allows you to associate a customer's signature to a specific document or documents by using the available Electronic Signature Methods.

IVR/Text Signature   Telephonic Signature

Key Features

There are some features that are common to all types of signatures:

County Sharing Update

County Sharing Program Update
Events to Date

- August 2022- Intake Program Assignment

- September 2022- Workload Management

- December 2022- IEVS

- January 2023 – Training

- **February 2023 – Enhanced Data Reporting (EDR)**
  - Recording
  - Attendance report
  - Chat from session
  - Agenda
  - Menti Survey
  - EDR Slide Deck from Monterey County
  - QA Summary Document

Materials can be found on the web portal at the following location:
Web Portal > County Documents > [County Share Resources] > [County Sharing Program] > County Sharing Events

ENHANCED
DATA
REPORTING
(EDR)

MONTEREY COUNTY

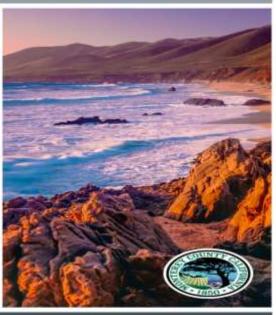| 1	2	3	4	5
Section 1.	Section 2.	Section 3.	Section 4.	Section 5.
Our Tools	Our Processes	Our Code	What we wished we knew	Questions

County Sharing Program Update
Lessons Learned from a County Perspective

What we wished we knew

- Bigger Tables
- C-IV vs CalSAWS capabilities and Permissions
- Certificate/Connectivity Issues

THANK YOU!

Enhanced Data Reporting (EDR)
Monterey County - Feedback

How was your overall experience participating in the County Sharing Event?

Update on Key QA Activities

Quality Assurance Team
QA Functional/Test, Technical, Migration Highlights

CalSAWS Independent Test Results

Release	# SCRs Reviewed	# SCRs Tested	# Scenarios Passed	Total Defects Found
22.09	3	11	247	13
22.11	4	11	296	9
23.01	3	14	547	13
Total	**10**	**36**	**1090**	**35**

QA Technical Reviews

21	3	2	6
CalSAWS SLAs Reviewed	Hyland SLAs Reviewed	County-wide System Impacts	Contact Center SCRs/Defects Reviewed

QA Migration Reviews

930	74	22	5
Wave 2 Requirements Reviewed	Conversion Defects Reviewed	Risks Monitored	Implementation Support Staff Deployed

Functional/Test Highlights

Quality Releases

CalSAWS/BenefitsCal Alignment

Fiscal/State Reports Support

Technical Highlights

System Performant

County-wide System Impacts

Contact Center Progress

Migration Highlights

Requirements and Conversion Defects

Wave 2 County Onsite Support

Lessons Learned & Retrospectives Planned

Procurement Updates
- AWS Services Update

CalSAWS M&O Procurement
Key Procurement Tasks

	M&O Procurement Event	Date
1	Release RFP	July 6, 2022
2	Bidder Question and Answer Period	July 7 – October 25, 2022
3	Business Proposal Part 1 Due Date	January 4, 2023
4	Business Proposal Part 2 and Price Proposal Due Date	January 18, 2023
5	Evaluate Administrative Compliance and Firm Qualifications	January 5 – February 1
6	Evaluate Business Proposals	February 1 – May 3, 2023
7	Conduct M&E Oral Presentations and Key Staff Interviews	April 11 – 14, 2023
8	Conduct Infrastructure Oral Presentations and Key Staff Interviews	April 20 – 27, 2023
9	Evaluate Price Proposals	April 17 – June 2, 2023
10	Conduct M&E Confidential Discussions	June 6 – 7, 2023
11	Conduct Infrastructure Confidential Discussions	June 20 – 22, 2023
12	Issue BAFO Instructions	June 29, 2023
13	Best and Final Offer (BAFO) Due Date	July 24, 2023
14	Evaluate BAFOs	July 25 – August 11, 2023
15	Evaluate Consolidated Price Proposals	August 16 – September 1, 2023
16	Conduct Final Evaluation Teams Meeting	September 12, 2023
17	Prepare, Review and Approve Vendor Selection Report	September 13 – October 20, 2023
18	Issue Notice of Intent to Award	October 23, 2023
19	Prepare for and Conduct Contract Negotiations	October 25 – December 1, 2023
20	State, Federal and JPA Contract Approvals	December 4, 2023 – April 26, 2024
21	Contingency Period	April 2 – April 22, 2024
22	Contract Start Date	May 1, 2024

CalSAWS Procurement Update
Changing the way we buy AWS services

- Use a Master Intergovernmental Cooperative Purchasing Agreement with OMNIA Partners.

  - That agreement is used by:

    - California Health and Human Services Agency (CHHS)

    - California Department of Social Services (CDSS)

    - California Department of Health Care Services (DHCS)

    - California Office of Systems Integration (OSI)

- Benefits:

  - Improved discount

  - Additional flexibility and visibility with AWS

  - Same reseller as our current provider

- Timing:

  - Planning for a 90 state and federal review (either June or July JPA meeting)

Update on Key State IV&V Activities

Independent Validation & Verification (IV&V)

Key Activities being monitored by IV&V

CalSAWS and BenefitsCal Releases
- CalSAWS 23.03 Testing
- BenefitsCal Development and Testing – ROI

Imaging Migration
- Production defect resolution
- Production enhancements
- Migration of images and documents from CalWIN to CalSAWS for Wave 3

Batch Performance
- Batch performance improvements and time savings
- Testing with 58 County caseload

CalWIN Data Conversion
- Wave 3 Mock Conversion, Wave 2 Conversion
- Triage and Resolution of open Conversion Defects
- Mitigation actions for improving the conversion cutover window for future CalWIN waves

CalWIN Implementation
- Wave 2: Post Implementation Support
- Wave 3: Interface Partner Testing
- Wave 3: Process Simulation
- Wave 3: County Data Validation
- Wave 4: CDG Reviews
- TOSS and IPOC Meetings, CNC Meetings

JPA Member Representatives Meetings & CalSAWS Conference

- Thursday, June 29, 2023
- January 2024

JPA Member Representatives Meetings/Conference
June 2023 and January 2024

- **June 2023 – Rancho Cordova/Zoom**
  - CalSAWS JPA Member Representatives Meeting
    - ✦ June 29, 2023
    - ✦ 8:30 a.m. – 12:00 p.m.
- **January 2024 – San Diego/In-person**
  - CalSAWS JPA Member Representatives Meeting
  - CalSAWS Conference/Migration Celebration
  - Details TBD

We Are
1

Adjourn Meeting