



**CalSAWS** | Project Steering Committee Meeting

March 16, 2023



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# Agenda

- ① Call Meeting to Order and confirmation of quorum
- ② 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 (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:
  - I. When connected via computer – click the microphone icon.
  - II. When connected via telephone – press \*6.



# Action Items

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# Action Items

4. Approval of the Minutes from the February 16, 2023, PSC Meeting and review of Action Items.



# Informational Items

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

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# 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

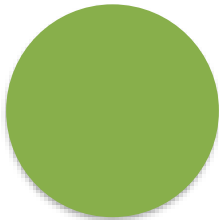
## CalSAWS JPA, PSC, and WCDS Sub-Committee

- 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)
  - 960 Virtual Interactions recorded during the first two weeks of Wave 2 Go Live! Almost half of all interactions are regarding Eligibility-MC, CF, CW

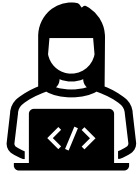
# Wave 2B Cutover Window

*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

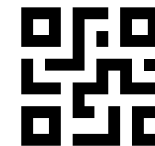


### CalSAWS Core:

- 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 1<sup>st</sup> 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 8,000 applications received in BenefitsCal in the first two weeks, 24,000+ accounts created and over 50,000 documents uploaded



## Wave 2 Application Metrics Since Feb 27<sup>th</sup>

Across Contra Costa & Santa Clara & Tulare

- 24,406 Accounts Created and Linked in BenefitsCal
- **8,322 Applications submitted between Feb 27<sup>th</sup> and Mar 12<sup>th</sup>**
- 1,082 Changes Reported
- 50,117 Documents Uploaded



## Cutover 2C and 3A Update



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# Wave 2C/3A Cutover Window

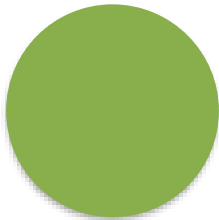
*Wave 2C/3A Cutover completed 5 hours ahead of the original forecast with the system available by 6am on Monday, 3/13*

- Baseline Plan was to Complete the Cutover by Monday, 2/27/2023, 5:16am
- Two issues occurred during the 2C (Closed Case) conversion process that required additional effort to correct and time to process. Initial estimated was approx. a 4 hour critical path risk to the cutover window
- Remediation steps completed successfully converting the 2C data. *Converted data was confirmed during the Stage Gate data validation checks*
- The teams mitigated the risk to 4 hour critical path to the cutover window :
  - Staging of the 3A (Staff, Profiles, and Offices) completed faster than planned bringing the Cutover to an hour of the baselined plan
  - DBA activities (i.e., Re-Enabling Indexes, regenerating Materialized Views, and Running Statistics) completed faster than planned resulting in the Cutover to complete ahead of the baselined plan
  - County Click-Thru, efficiently, completed sooner than the projected Finish time which then resulted in the 2C/3A Cutover completing 5 hours ahead of schedule at 12:06am Monday, 3/13



## 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 3/10/2023]

Readiness Area*	Readiness Category	Wave 3	Wave 4
<b>Application</b>	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
<b>Integration</b>	County Interface Partner Test (IPT) Execution	C	G
	State Interface Partner Test (IPT) Execution	C	G
<b>Conversion</b>	CDV Defects Resolution	G	G
	EDBC Match – Auto Review Rates	G	G
<b>Technical</b>	County Network Connectivity	G	G
	Performance Testing	NS	NS
<b>Training</b>	Wave County Classroom Set-Up	C	G
	WBT Training Delivery	G	G
	ILT Training Delivery	G	NS
<b>Organization</b>	Change Discussion Guides (CDGs)	C	G
	Communications	G	G
	Business Process Reengineering	C	C
	Configuration	C	NS
	Process Simulation	C	NS
<b>Implementation</b>	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

# County Readiness Summary: Wave 3 – 4 Readiness [as of 3/10/2023]

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	C	C	C		G	G	G	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
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## Wave 3 County Readiness Checklist Activities by Status (as of 03/13/2023)

Status	00 All Counties	06 Orange	07 Santa Barbara	08 Ventura	Wave 3 Counties	T:
COMPLETED	11	521	472	459	86	1549
NOT STARTED	2	73	70	72	85	302
IN PROGRESS	0	76	87	91	28	282
<b>Total Unique Issues:</b>	<b>13</b>	<b>670</b>	<b>629</b>	<b>622</b>	<b>199</b>	<b>2133</b>

## Wave 4 County Readiness Checklist Activities by Status (as of 03/13/2023)

Status	00 All Counties	09 San Diego	10 San Mateo	11 Santa Cruz	12 Solano	Wave 4 Counties	T:
IN PROGRESS	3	77	87	102	88	7	364
NOT STARTED	1	158	167	161	163	144	794
COMPLETED	27	316	331	319	335	15	1343
<b>Total Unique Issues:</b>	<b>31</b>	<b>551</b>	<b>585</b>	<b>582</b>	<b>586</b>	<b>166</b>	<b>2501</b>

## County Readiness Highlights

### Wave 3

- 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 IPT readiness for completing their development is behind schedule however they will be able to start IPT on 3/15/2023.

# 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		Low
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	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:**

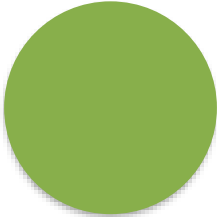
- Wave 4 will contain approximately 40% more data than Wave 2; Wave 5, 50%; Wave 6, 10%
- Cutover timings will be revised based on Wave 2 and 3 Go-Live actuals (for assessment and estimating)
- Testing of GoldenGate and additional performance tuning of the cutover logic will be ongoing throughout the 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
  - Address Change Process Flow and Messaging Between Worker/Client (Action Item)
  - Release of Information Expectations for April and May (Action Item)
  - Support Request Updates/Metrics from Production
- 
-

## 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

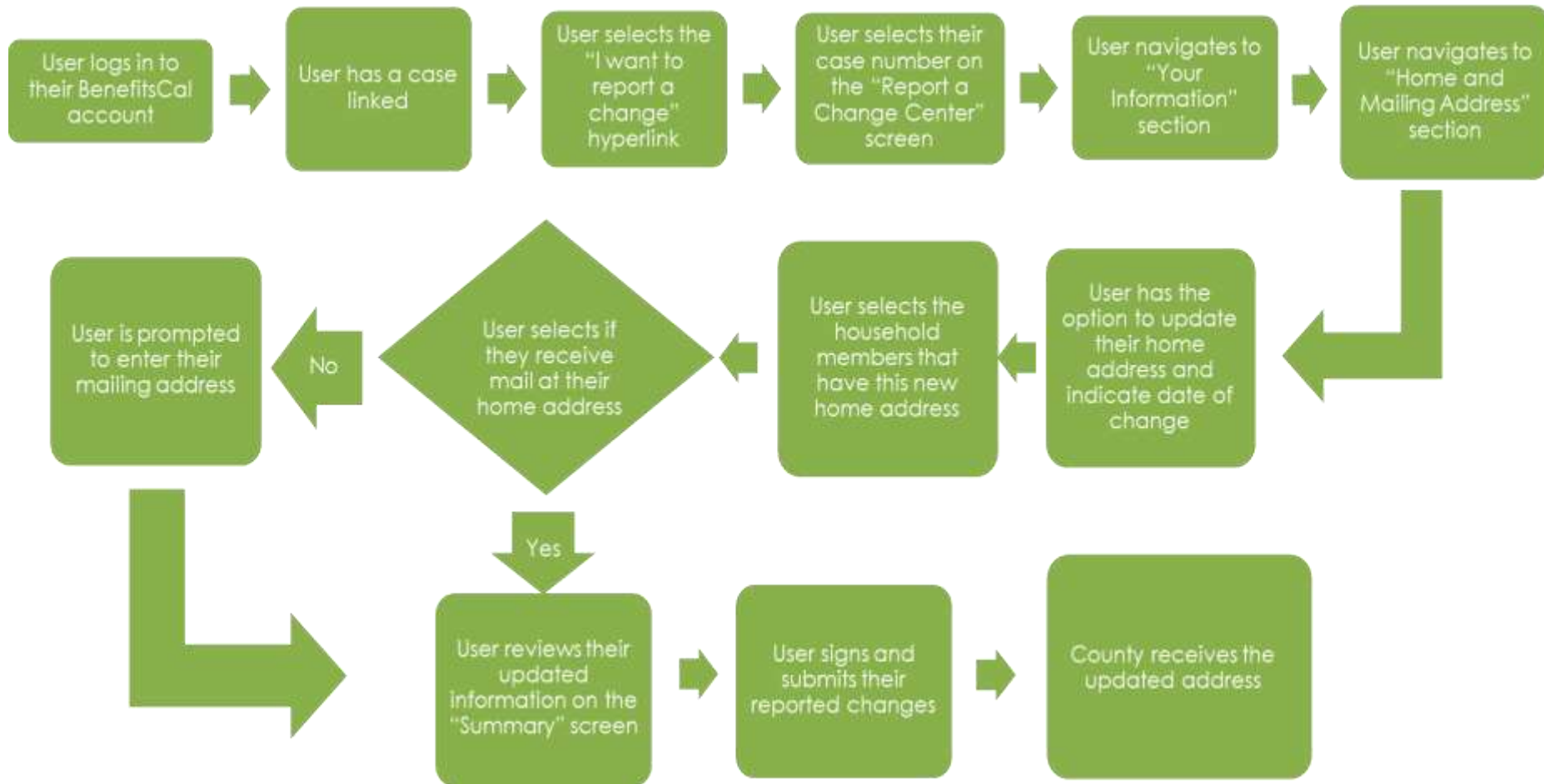
- Social Security Income, Electronic Benefits Transfer (EBT), Disability Insurance, Unemployment Insurance, Low Income Home Energy Assistance Program (LIHEAP) and Low Income Household Water Assistance Program (LIHWAP), Lifeline, In Home Supportive Services, Child Support, Foster Care Parent Registration

### 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**

## Address Change Process Flow by Customer



### What CBO's see today

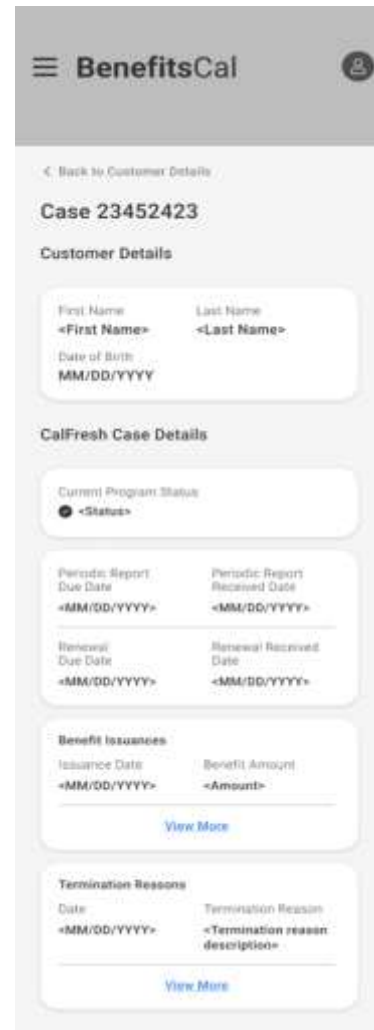


### What will CBO's see after ROI is implemented

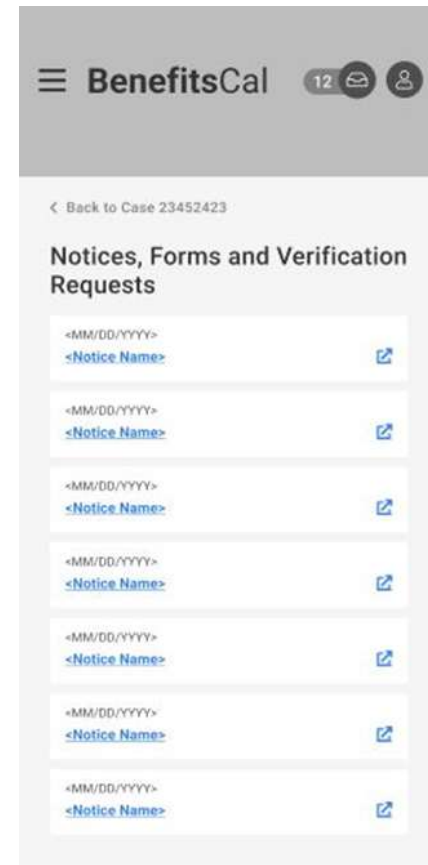
#### Customer's Cases and Programs



#### Customer's Case Specific Details



#### Customer's Case Specific NOAs and Forms



# 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 27<sup>th</sup>

#### Supportive Services

- 1311 requests between Jan 27<sup>th</sup> and Mar 2<sup>nd</sup>

#### Counseling

- 241 requests between Jan 27<sup>th</sup> and Mar 2<sup>nd</sup>

#### Keeping your benefits

- 1240 requests between Jan 27<sup>th</sup> and Mar 2<sup>nd</sup>

# BenefitsCal Technical Service Desk

## Implementation Status

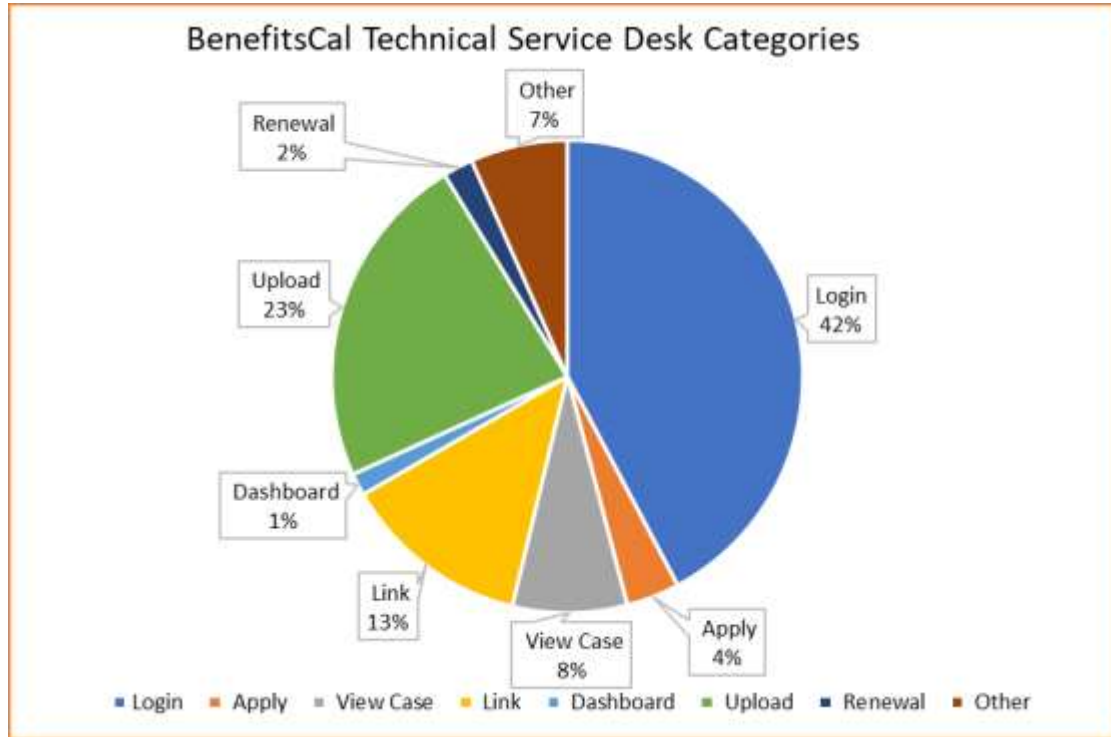
### Order of Engagement

- 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



- 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.

# BenefitsCal Technical Service Desk

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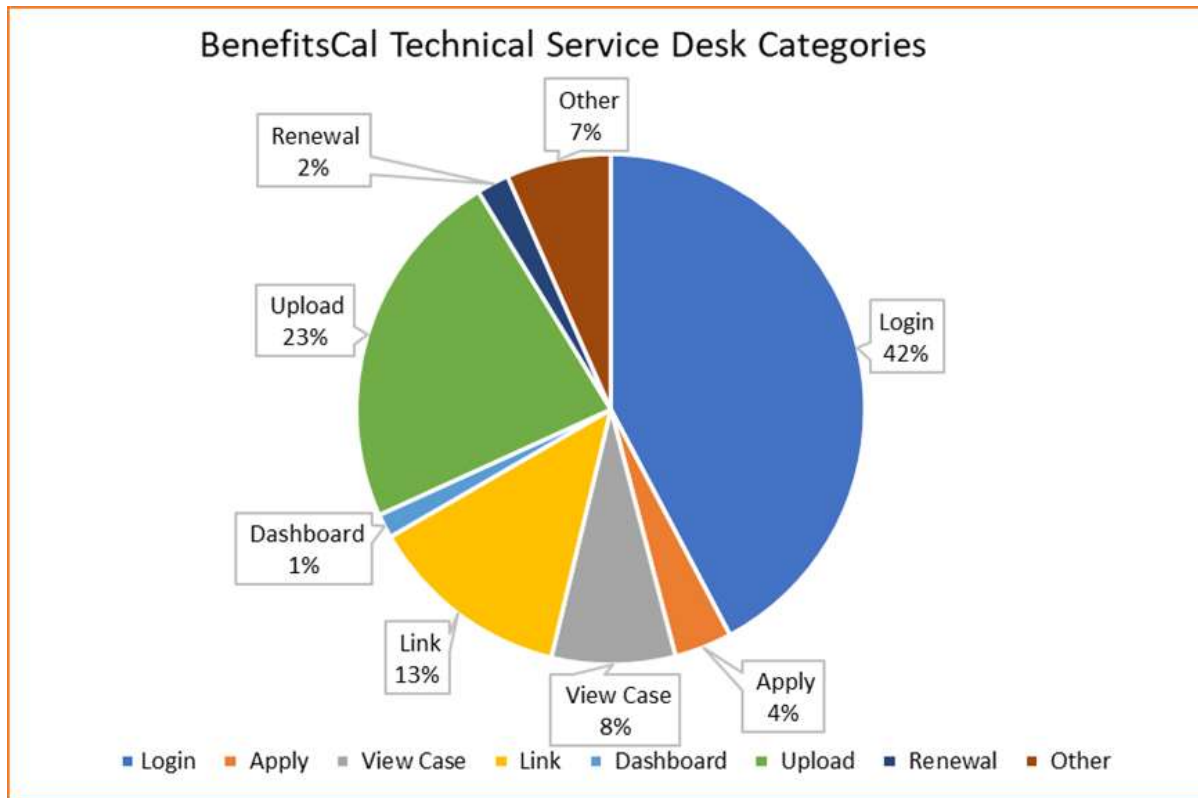
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## Release and Policy Update

- Continuous Coverage Unwinding
  - CalSAWS
  - BenefitsCal
- 
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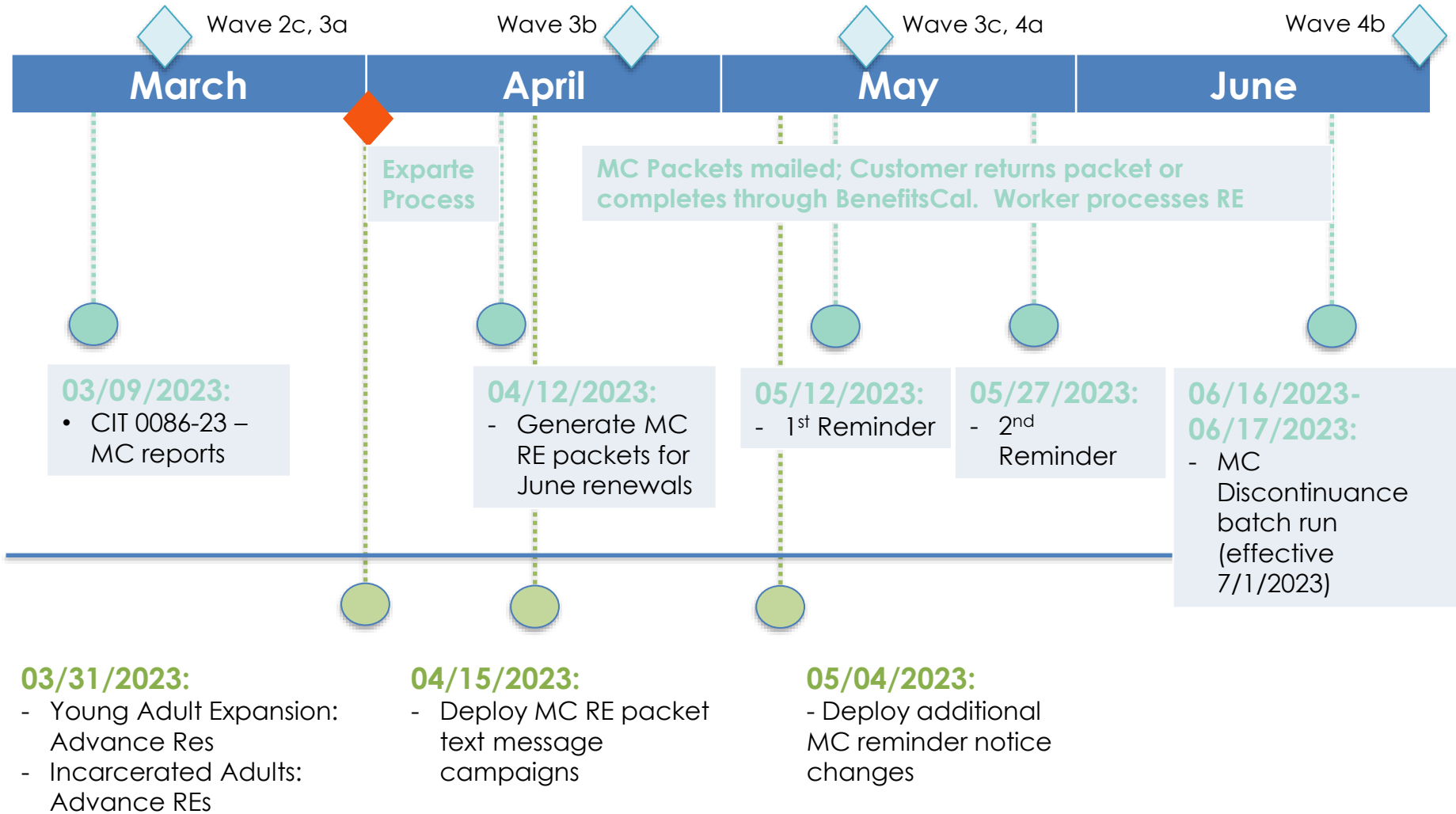
# CalSAWS Release and Policy Update

## Continuous Coverage Unwinding

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

# CalSAWS Release and Policy Update

## Continuous Coverage Unwinding – Automation Updates

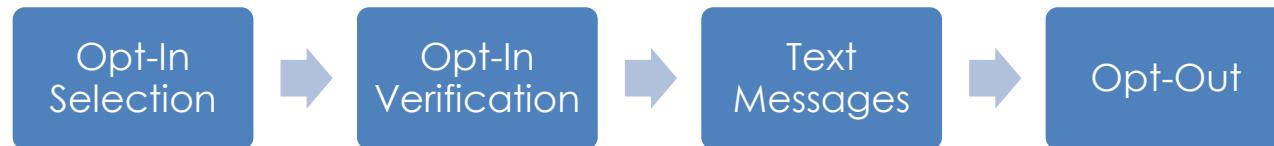


All counties begin renewal activities for the first **Medi-Cal Continuous Coverage Unwinding renewals** on 4/2023 for cases with renewal Due Month 6/2023.

# CalSAWS Release and Policy Update

## Continuous Coverage Unwinding – FCC Clarification

- FCC Clarification: DHCS - MEDIL 23-12
- 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



# 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

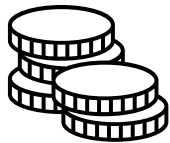
- One time data change CA-256904: For any phone number listed as type “Cell”, a one-time data change will be run to Opt-In the cell phone for texting and set the text message status to “Verified”
- Code changes: For new cell phone numbers added after the data change, update the Contact Detail page logic to Opt-In the cell phone for texting and set the text message status to “Verified”
- CalWIN has opened proposal #64196 and is currently assessing options and impacts for this effort

# CalSAWS Release and Policy Update

## Continuous Coverage Unwinding – FCC Clarification

### ■ CalSAWS Texting Solution - Dependencies

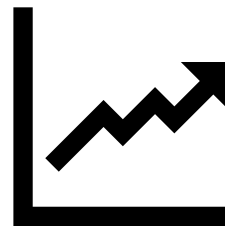
#### • Budget Impacts:



- ✦ 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 SRFRA 1246. Additional funding is needed to support this change

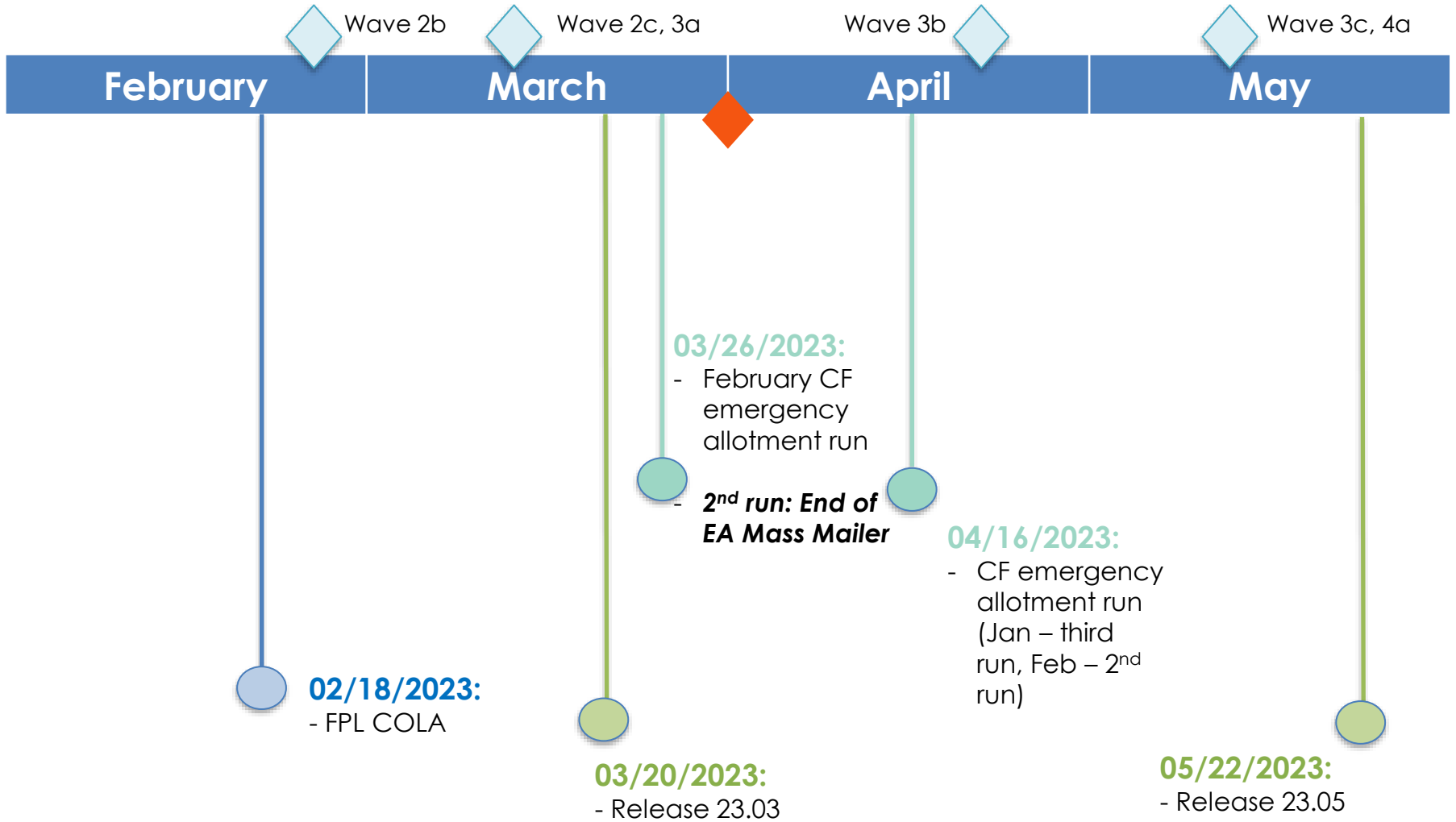
#### • System Scaling:

- ✦ 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



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

**4/24/23**

W3

- CalWIN Wave 3 Go-Live

**05/25/23**

ROI

- Release of Information

**06/22/23**

TC

- CalWORKs Timeclocks

**7/3/23**

W4

- CalWIN Wave 4 Go-Live

### Spring 2023

★ Quarterly CM Meeting

### Summer 2023

★ Quarterly CM Meeting

#### 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

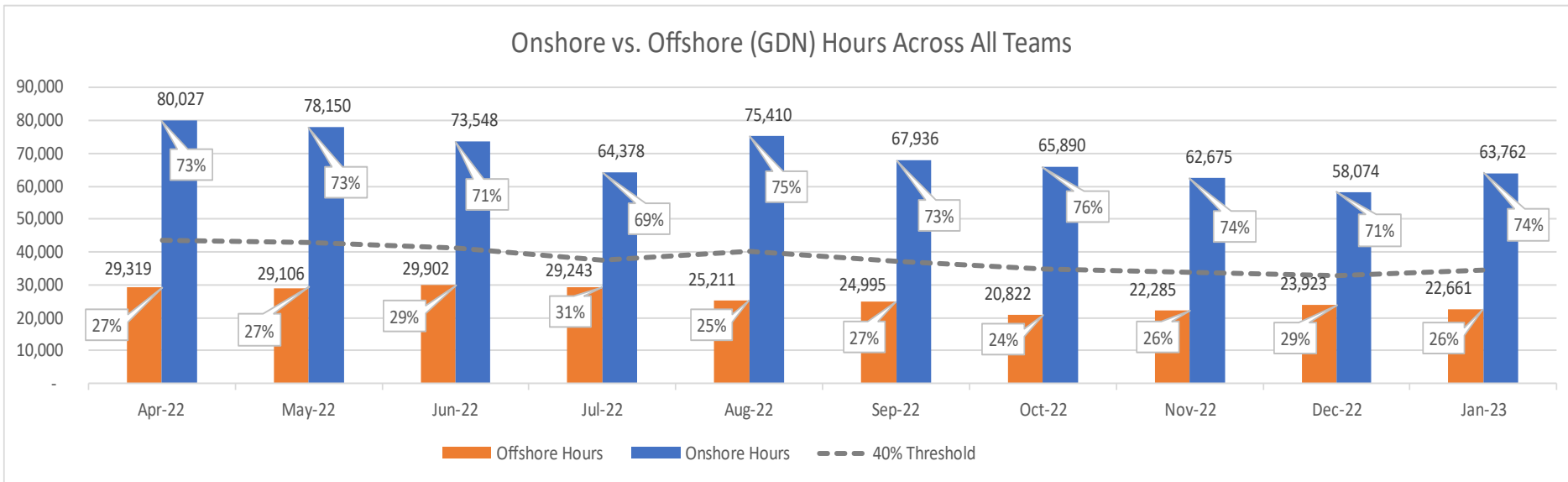


## Technical Operations Update

- CalSAWS Quarterly Quality Metrics
  - Production Outage Calendar
  - Hyland SLAs
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# CalSAWS Quarterly Quality Metrics

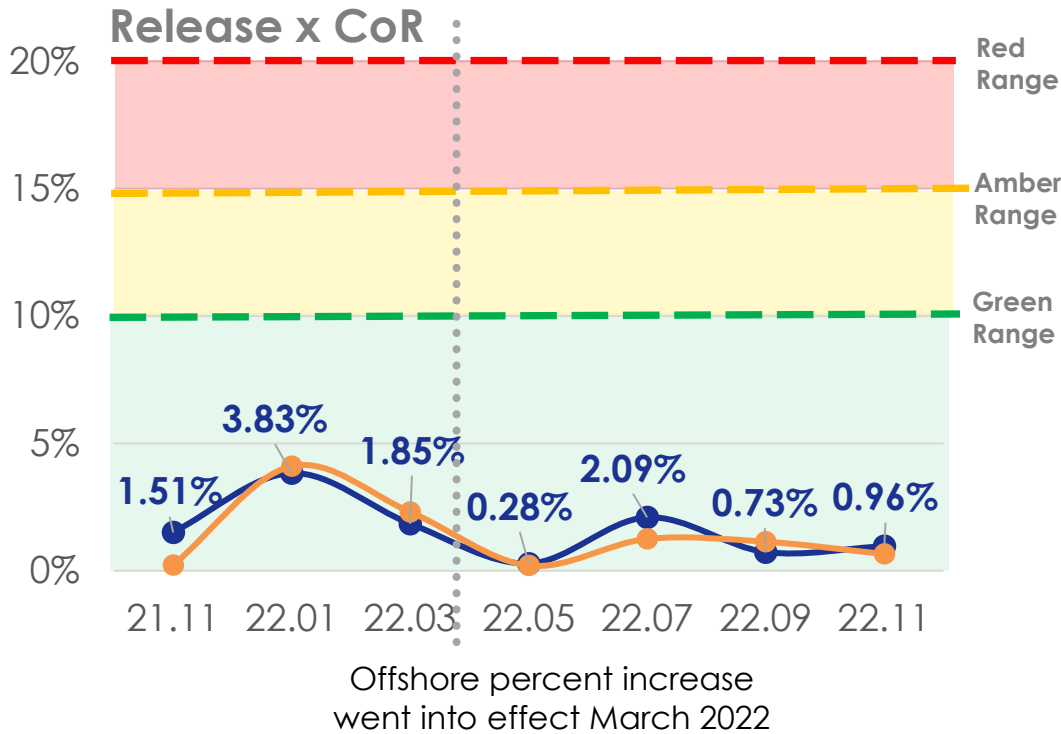
## GDN Workload Balance



**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



**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  
 $(\text{Actual Rework effort Hours} / \text{Actuals To Date Hours}) * 100$

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

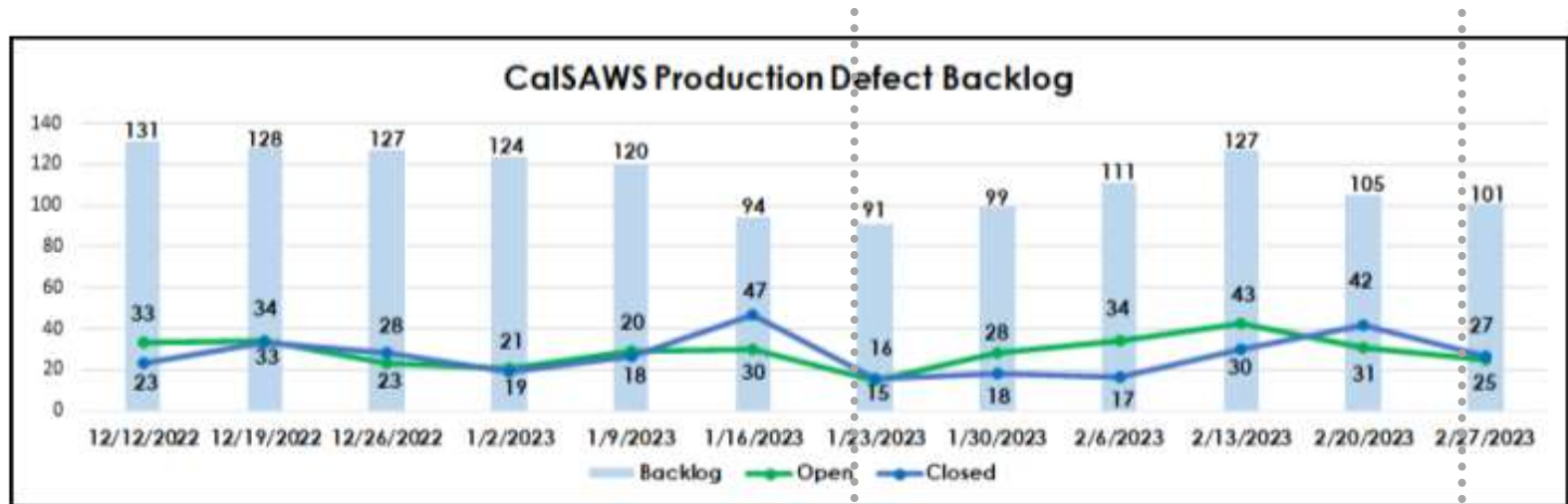
New releases are added after the next release Go-Live and an analysis can be conducted on the previous release. For example, 23.01 COR numbers will be available after 23.03 goes live at the end of March 2023

# 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




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 	3 	4 	
			2:40pm-5:35pm Reception Log information not visible on Reception Log pages				
5 	6 	7 	8 	9 	10 	11 	
12 	13 	14 	15 	16 	17 	18 	
19 	20 	21 	22 	23 	24 	25 	
			10:40am – 2:50pm Agents were unable to access CCP, eCCP				
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:  $1 - (\text{total downtime minutes} / \text{total monthly minutes}) \times 100$

#### Monthly Uptime Target: 99.90%

##### Monthly Uptime Service Level Credits

99.89-99.00%	10% of the Monthly SaaS Fees
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Less than 99.00%	20% of the Monthly SaaS Fees
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<b>February Actual Uptime</b>	<b>100%</b>
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<b>February Service Level Credit</b>	<b>\$0.00</b>
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# 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
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<b>February Actual Monthly Page View Percentage</b>	<b>99.14%</b>
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<b>February Service Level Credit</b>	<b>\$0.00</b>
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# 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
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<b>February Actual Database Transaction Percentage</b>	<b>99.90%</b>
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<b>February Service Level Credit</b>	<b>\$0.00</b>
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Contact Center Implementation  
Update



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# 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 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

<b>Contact Center WBT Training</b>	Contact Center Training is in CalSAWS LMS. All Contact Center Training is web-based. This is completed when general CalSAWS Training is scheduled.
<b>Model Office Prep</b>	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).
<b>Assign Contact Center CalSAWS Security</b>	There are additional Contact Center security groups in CalSAWS to enable access for agents: <b>CCP Agent, Call Log View, Call Log Edit</b> . 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
<b>All Non-Contact Center Staff</b>	Electronic Signatures County Staff*
<b>Contact Center Agents – Staff Taking Calls</b>	Enhanced Call Control Panel (eCCP) Agents Electronic Signatures Contact Center Agents* CalSAWS Amazon Connect Overview*
<b>Contact Center Supervisors</b>	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*
<b>Contact Center WFM/Administrators - Gatekeepers</b>	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 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**

- Document Signatures** - Use a Signature to sign a single document at a time.
- Text Signatures** - A text message with the capture code is sent to the customer.
- IVR Signatures** - A three-way call with the customer is initiated to capture the signature.
- Document Signatures** - Use a Signature to multiple documents at a time.
- Basic Call** - Obtain and exit a transcript of the Telephonic Signature.
- Quality Assurance** - Analyze whether the Telephonic Signature meets quality standards.
- Voice Recording** - Capture a customer's voice recording in the CalSAWS app.

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

- Tasks and Auto-Journal** - Entries will be generated for each one of the signature methods based on different scenarios.
- Signature History** - The Signature History gets populated regardless of the method selected.



# County Sharing Update

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# County Sharing Purpose

Provide a County perspective to CalWIN Counties on CalSAWS functions; useful to M&E Counties too!

- Past County Sharing Events
  - August 2022 - Intake Program Assignment
  - September 2022 - Workload Management
  - December 2022 - IEVS
  - January 2023 - Training



# February County Sharing Topic

## Enhanced Data Reporting (EDR)- Held 2/21/2023

- **Monterey County** presented in the session.
- Content- overview of structure and tools used in conjunction with county procured EDR environment
- More than **330** people logged in (total count unknown as many gathered in conference rooms)
- **69.4%** of attendees expressed that they would recommend the EDR experience to others



# Feedback from the session

## What was your impression of the session?

“Perfect job by the Moderator, she made sure all the questions were answered. Monterey did a great job and their willingness to share their code was appreciated by the counties who would be going the SQL server route.”

“Zooming in 30 minutes early to prepare for the session was a good idea. I hope our process will be helpful saving time and effort for others.”

“Well done. Great opportunity to network and build Data reporting support among counties.”

“The meeting was well organized, and the time allotted was sufficient. It was rewarding to share our knowledge with other counties struggling and needing a starting point. It made me feel very proud to put the county’s name out there and proud of our team here.”

“Looking forward to the next session and working with getting our own resources out there for the counties!” “You guys are Awesome!!! What a paradigm shift in the way of doing business!!!”

# Next Session?

March or April- Topic: TBD

## ■ **Next Steps:**

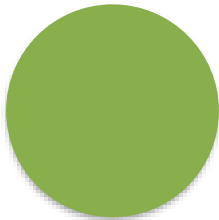
- Identify functional topic- Connect w/RMs to give input!
- Identify which counties are willing to present
- Develop specific/relevant content
- Send invites!





## 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-day state and federal review (either June or July JPA meeting)



# Update on Key QA Activities

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# Quality Assurance Team

## QA Functional/Test, Technical, Migration Highlights

### CalSAWS Independent Test Results

Release	# SCRs Reviewed	# SCRs Tested	# Scenarios Passed	Total Defects Found
22.11	4	11	296	9
23.01	3	14	547	13
23.03	6	9	245	9
<b>Total</b>	<b>13</b>	<b>34</b>	<b>1088</b>	<b>31</b>

### QA Technical Reviews

<b>21</b> CalSAWS SLAs Reviewed	<b>3</b> Hyland SLAs Reviewed	<b>2</b> County-wide System Impacts	<b>6</b> Contact Center SCRs/Defects Reviewed
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### QA Migration Reviews

<b>930</b> Wave 2 Requirements Reviewed	<b>74</b> Conversion Defects Reviewed	<b>22</b> Risks Monitored	<b>5</b> Implementation Support Staff Deployed
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### 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



## Update on Key State IV&V Activities

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# 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





## State Partners Updates

- OSI
  - CDSS
  - DHCS
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# Regional Updates

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Adjourn Meeting



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