CalSAWS | JPA Board of Directors Meeting



April 14, 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.



4. Approval of Resolution Recognizing June Hutchison for her Contributions to CalSAWS upon her Retirement.



5. Approval of ClearBest Change Order No. 7, which includes request for additional allocation for future work orders.

- 6. Approval of Consent Items
 - Approval of the Minutes and review of the Action Items from the March 10, 2023, JPA Board of Directors Meeting.
 - Approval of ClearBest Change Order 6, work order 23, which includes the request for Update of premise item ABAWD.
 - c. Approval of ClearBest Change Order 7, work order 1, which includes request to add quality assurance services for additional Premise items.
 - d. Approval of ClearBest Change Order 7, work order 2, which includes request to add implementation support staff augmentation services.
 - e. Approval of Deloitte Portal/Mobile Change Order 3, work order 12, which includes request to add allocation for ARPA – Communication and Marketing Campaign (Phase 2)

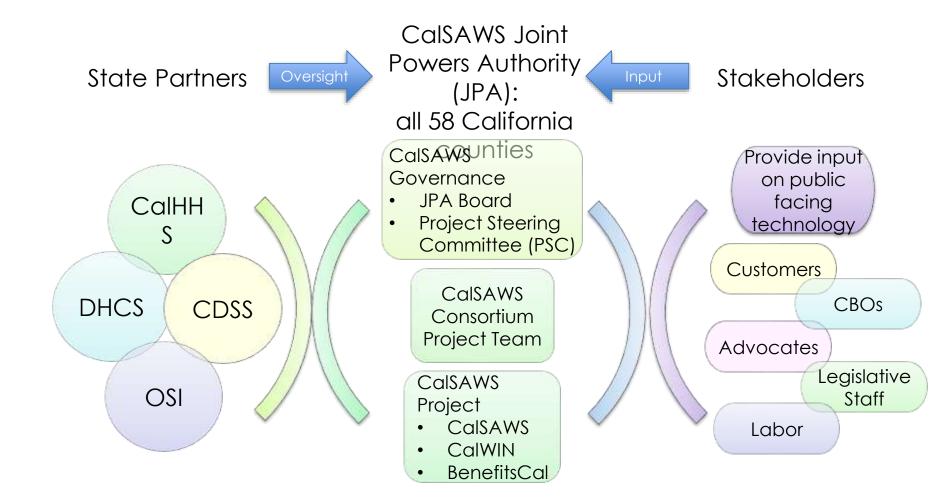
Informational Items



Legislative Staff Briefing



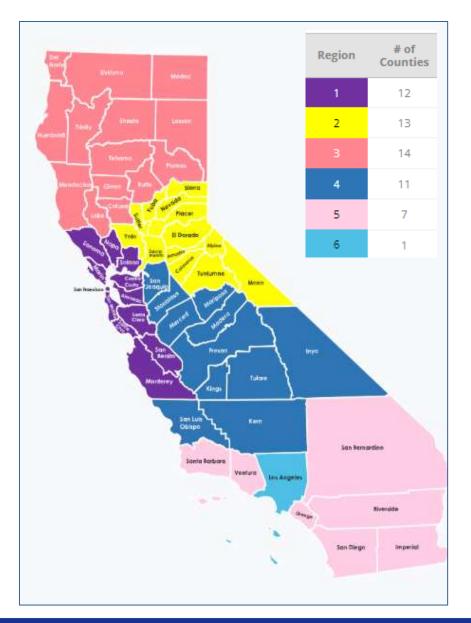
CalSAWS Ecosystem



California Statewide Automated Welfare System

The CalSAWS Consortium is comprised of all 58 California counties, which are organized into six (6) regions. The governance structure is based on geographic proximity and loosely based on persons being served by such counties. The counties are represented by a Board of Directors and a Project Steering Committee.

Today, 45 of 58 Counties use CalSAWS. The other 13 will move to CalSAWS by the end of October 2023.

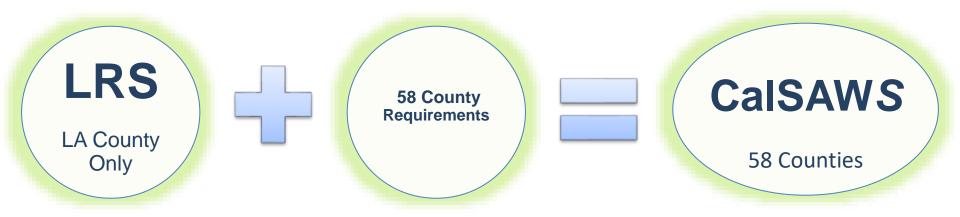


Journey to CalSAWS

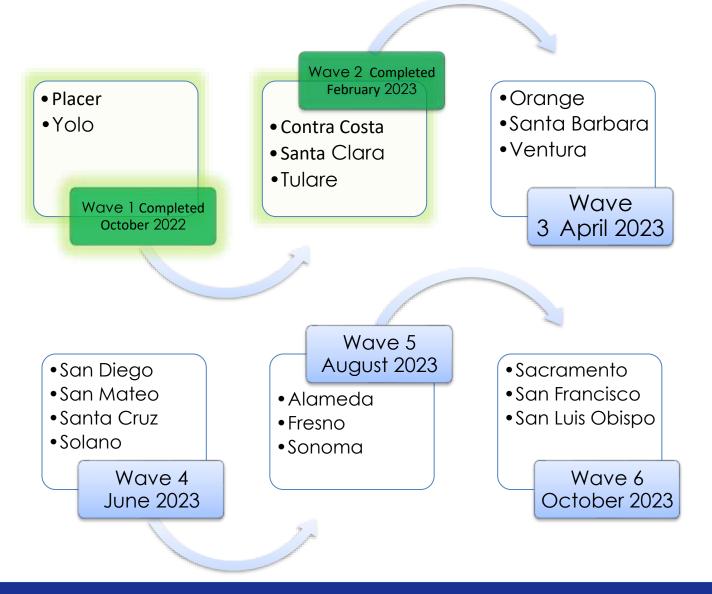
California has a Federal mandate to expand LRS (the SAWS for LA county only) to all 58 Counties by the end of calendar year 2023. At the time of the mandate, 3 systems were operating, C-IV, CalWIN and the LA precursor to LRS.

CalSAWS became a reality in September 2021 when 39 C-IV counties migrated to the Los Angeles system previously called LRS.

As of October 2022, CalWIN migration began. 45 counties are now on CalSAWS and the remaining 13 counties will be by October 2023.



CalWIN Counties by Wave/Migration Month



CalSAWS Success by the Numbers



- 1. Benefits provided to California families in 2022. In 2021, the total was \$12.1B
- 2. CalFresh Emergency allotments subset of #1
- 3. CalFresh Mass Replacements for earthquake and flooding related power outages in December 2022/January 2023
- 4. Disaster CalFresh Benefits 10+ counties approved in 2023 for Disaster CalFresh through 3/27/2023

Journey to BenefitsCal

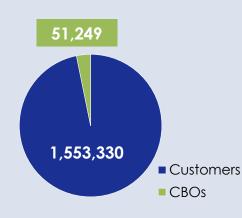


BenefitsCal is a public facing website that allows customers to apply for and manage their benefits. It also allows for Community Based Organizations (CBOs) to assist customers with these tasks.

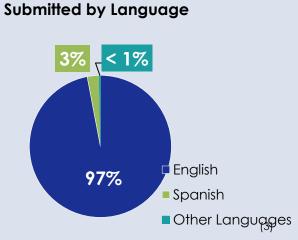
Total BenefitsCal Applications since 9/2021

1,642,692 households took the first step to receive food, cash, and/or medical assistance.

Number of Applications Submitted by User Role



55.4% of application submitted using GetCalFresh 3.3% of application submitted by CBOs



Language % is consistent with non-BenefitsCal submitted applications

Percent of Applications

Note: Cumulative totals as of 3/23/2023

- BenefitsCal was procured, developed and implemented during the pandemic, with input from stakeholders and counties
- Functionality expanded on previous online selfservice portal

20

Threshold

Languages





BenefitsCal Success By the Numbers

BenefitsCal is not a standalone system and interacts with CalSAWS in near real time

Customer Messages Sent / Received 72,219

Total messages that customers have securely sent to their county or received from their county via BenefitsCal

Notices / Correspondence Viewed

5,264,408

Customers with accounts have viewed notices and correspondence through BenefitsCal

Note: Cumulative totals as of 3/23/2023

Renewals, Reports, and Changes

1,018,566

445,989

Renewals completed by households.

309,966

Periodic Reports completed by households.

262,611

Households **reported a change** with no need to call or go into a county office.

Documents Uploaded

17,650,335*

Time saved by reducing steps to share documents.

As new functionality is added, BenefitsCal and CalSAWS work together to provide a seamless transition between front end customer facing BenefitsCal interface and backend facing County worker processes in CalSAWS





BenefitsCal Success By the Numbers

Account Creation and Customer Reporting

Customer Accounts Created 1,804,307 Customers created accounts to

apply for and manage their benefits on BenefitsCal since Go-Live 9/2021

Daily CBO Logins

~490

Each day CBOs with established accounts login to support customer applications and upload application documents

Daily Customers Login 100,000+

Each day customers with established accounts login to check their case status, EBT balance, connect with a county or perform case maintenance activities

Customer Login Rate



Daily Customer Password Resets

~6.5%

Customers perform password reset independently

99.3%

Customers are able to login successfully without needing additional assistance

CBO Accounts Created

3,896

Community Based Organizations (CBOs) have created accounts to assist customers on BenefitsCal.

Note: Cumulative totals as of 3/23/2023

BenefitsCal – Voice of the Customer

"I like this [household summary]. I like this right here because it's clear! I had public assistance, I have a disability, and I'm in college. It's important, those are the important details. 'Not quite right?' I can edit or fill in the missing details. I like that because there are times I wonder if I've hit the wrong button. So, it's nice to be able to move back and forth." – Customer on the Application

simplified... [The questions] are plain, they're simple and to the point as compared to the paper application." -Customer on the Application I would feel good knowing I did [the SAR7] right. Whenever, I left the other website I was always thinking in the back of my mind, 'Did I do it right?' – Customer on the SAR7

was a big stigma about [applying for benefits]. It's like 'oh, I'm taking taxpayers' money. So, I'm not going to apply.' But that [text] right there would totally make someone not feel that stigma about applying. I like that it mentions educational goals and family. – Customer on the Student Honestly, whoever thought of [BenefitsCal] did a great job, they put themselves in the shoes of the person who has to answer the questions. -Customer

Hike how it's setup, Actions, Messages, and Notices. You can filter, that's also a good thing. I like that it shows my message has been sent and the case number... [for actions] I like that it says pending review, that lets me know what's going on. It eases my mind that things are not overlooked, that things are happening. -Customer on the Message Cent<u>er</u>





BenefitsCal – Voices from CBO Staff

I like that it's all on a phone... I think it's very much needed in the community... As a client, it is pretty intuitive, and it is nice that you can do everything on your phone... It helps reduce stigma you don't have to fill out paperwork or go to the county office. – CBO on Mobile-First Design The reports section is really useful. We're supp osed to do follow-up calls that people were not wrongfull y denied, so having the data is really important. -CBO on Account Features

Using the document upload would be nice because it turns a 2-step system into a 1step system. We would not have to send it to an email and they have to open the email anymore. – CBO about Document Upload

I love the Application Summary and being able to continue my applications. This is definitely something I would use. – CBO about the Application

BenefitsCal Customer Engagement

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BenefitsCal was designed with a Customer Focus using input from Customers, Advocates, Community Based Organizations (CBOs) and County/State stakeholders throughout the process



- User Centered Design Discovery focus groups with Customers, CBO staff, and County Workers
- Design sessions with Stakeholders, State Partners and County Representatives
- First round of design review sessions
 and feedback collection with Advocates/CBOs
- Take-it-to-the-lab (i.e. ad-hoc interviews) with customers to address specific design questions



- 1-2 rounds of usability testing with end-users
- Second round of design review sessions and feedback collection with Advocates/CBOs
- Design iterations based on usability test findings and feedback
- User Acceptance Testing with Stakeholders and County Workers



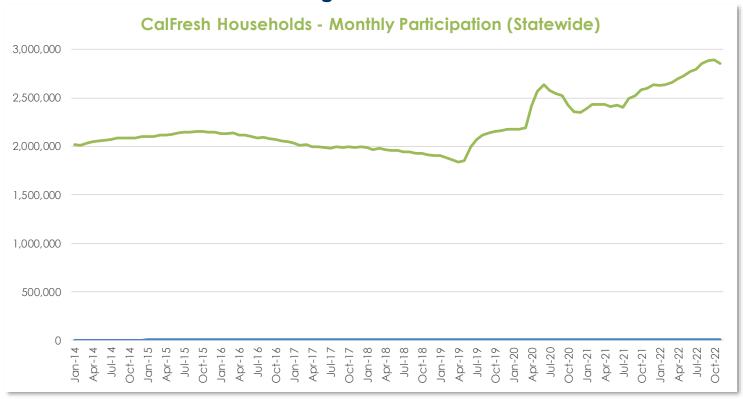
- Customer Experience Measurement (i.e. Always-on Survey, Intercept Survey, Web Analytics, Usage Data, interviews with users) informs enhancements
- Policy related enhancements are prioritized to align with the effective dates

	User Centered Design Engagement to Date			
176 Customers	94	131 CBO Staff	7,112 Survey Responses from Customers & Assisters	



CalFresh Caseload Growth – By Household

The COVID-19 pandemic, program expansions/policy changes, and outreach efforts have had a significant impact on caseload growth.



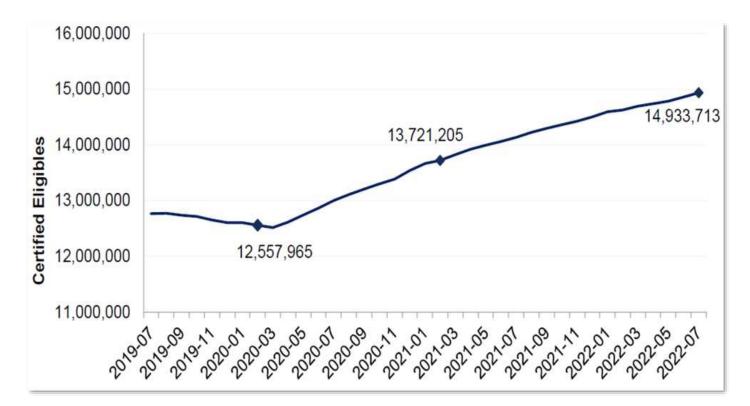
CalFresh Program Caseload Growth

• Between 01/2014 and 03/2019, CalFresh caseload shrunk 8% (compounded decrease of -0.14% monthly)

• Between 03/2019 and 03/2020, CalFresh caseload grew 18% (compounded growth of 1.25% monthly)

Between 03/2020 and 11/2022, CalFresh caseload grew 30% (compounded growth of 1.50% monthly)

Medi-Cal Caseload Growth – By Individual

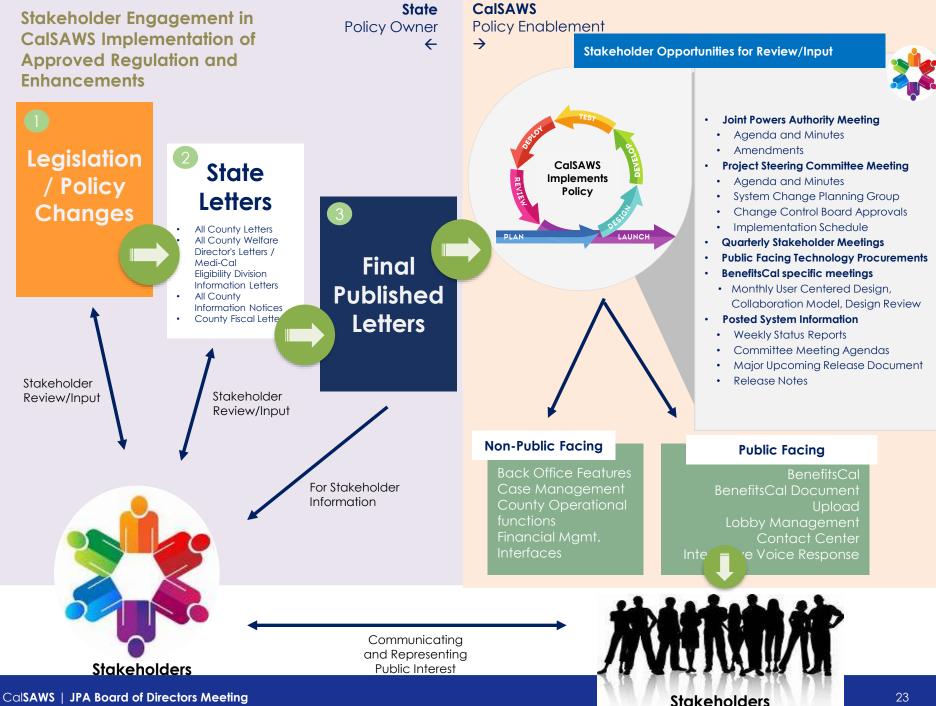


- Between 07/2019 and 03/2020, Medi-Cal population <u>shrunk 2%</u> (compounded decrease of -0.25% monthly)
- Between 03/2020 and 07/2022, Medi-Cal population grew 19.3% (compounded growth of 0.65% monthly)

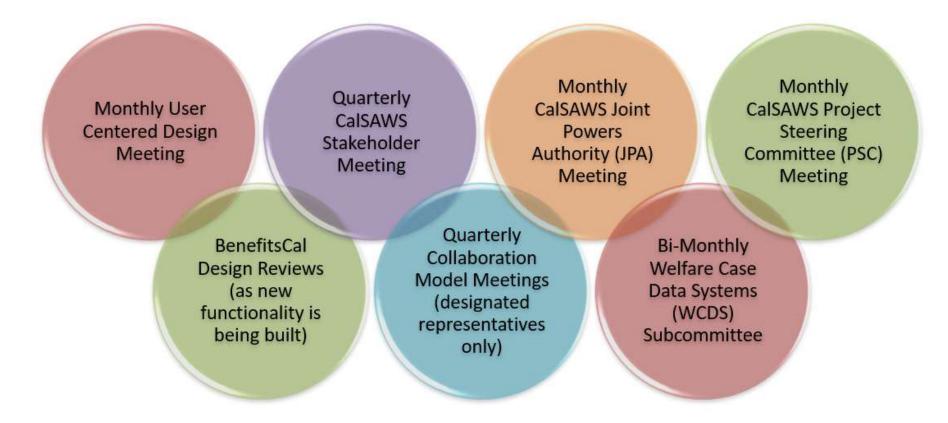
Note: This chart does not include state managed programs, like SSI.

Stakeholder Engagement





Opportunities for Stakeholder Engagement with the CalSAWS Project



Policy Implementation Timeline Examples



CalSAWS Policy Implementation Timeline*



Note: BenefitsCal only changes that do not require CalSAWS integration may implement more • Policy Guidance: clear & complete final state policy, including auickly.

Implementatio n timing is based on several factors including:

*Timelines varv according to complexity of the change

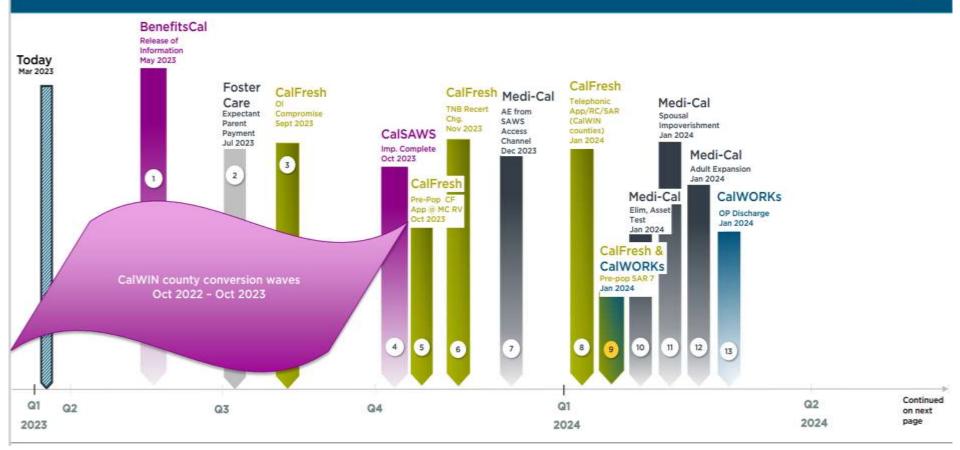
- notices translated into all threshold languages, quick turnaround on follow up questions
- Coordination with BenefitsCal/Other Changes: other changes underway; multiple releases are always in progress, so automation activities cannot always start immediately
 - **Competing Priorities**: Timing may be adjusted due to higher priority items such as policy changes like Medi-Cal Continuous Coverage Unwinding
 - Scheduling: CalSAWS releases are bi-monthly (odd) months). Eligibility cycle and noticing timeframes require that automation must be available prior to the effective date in order to calculate benefits and generate timely notices. Example: Implement in November for a January benefit month.

Unwinding Medi-Cal Continuous Coverage

- During the pandemic, CalSAWS system changes were employed to assist beneficiaries to remain on Medi-Cal
- With the upcoming Unwinding of Continuous Coverage, CalSAWS is in the process of implementing several changes to assist beneficiaries to complete necessary updates for correct assessment of Medi-Cal at their renewal
 - Announcements on BenefitsCal to remind beneficiaries to update address as needed
 - Medi-Cal Renewals sent in yellow envelopes to stand out from other mail
 - Text messages to advise of upcoming renewal and status of Medi-Cal renewal
 - Additional reminder notice by mail in the event renewal not returned before due date
 - Items prioritized through the BenefitsCal Collaboration Model to assist the renewal process for Customers and CBOs

Key Upcoming SAWS Initiatives, Policy Changes & Related Projects

Page 1



Notes on the SAWS Policy slide

General Notes:

- · The length of bars or size of clouds has no correlation to the size of the effort
- Dates on policy items represent target implementation date in statute, where one exists. Automation dates may be earlier or later, depending on many factors, including
 when complete policy is issued, including NOAs and forms in all threshold languages
- · Orange shading of number circle indicates items that are not currently on track to be automated by the target date
- Clouds represent areas where timing is less certain and may not correlate to the timeline

Specific Notes and Key to Acronyms:

1 - Implementation of BenefitsCal Release of Information functionality is anticipated in May 2023.

2 - Last year's budget included an Expectant Parent Payment for foster youth, which is required to be implemented manually by January 2022, and automated in CalSAWS by July 2023.

3 - A new CalFresh overissuance compromise policy will be effective September 1, 2023.

4 - The CalWIN counties will begin migrating to CalSAWS in October 2022, and the last wave will migrate in October 2023.

5 - Last year's budget included the creation of a pre-populated CalFresh application to be sent to apparently eligible Medi-Cal recipients upon Medi-Cal renewal. This will become available for counties in CalSAWS in January 2022 and will be provided for CalWIN counties as they migrate, with the process applying to all counties by October 2023.

6 - A prior budget included a change in the TNB renewal cycle from 6 months to 12 months. This will be implemented in November 2023.

7 - Accelerated Enrollment for MAGI Medi-Cal from the SAWS access channel is anticipated to begin in December 2023.

8 - Last year's budget included a requirement for LA and the C-IV counties to implement a telephone-based service model for CalFresh no later than January 2023 (completed), and for CalWIN counties to implement no later than January 2024.

9 - A prior budget included the creation of a pre-populated SAR7 for CalFresh and CalWORKs, which was targeted for implementation January 1, 2024, however, due to delayed policy guidance, the implementation date will be delayed. CalSAWS will assess the new implementation date once policy has been released.

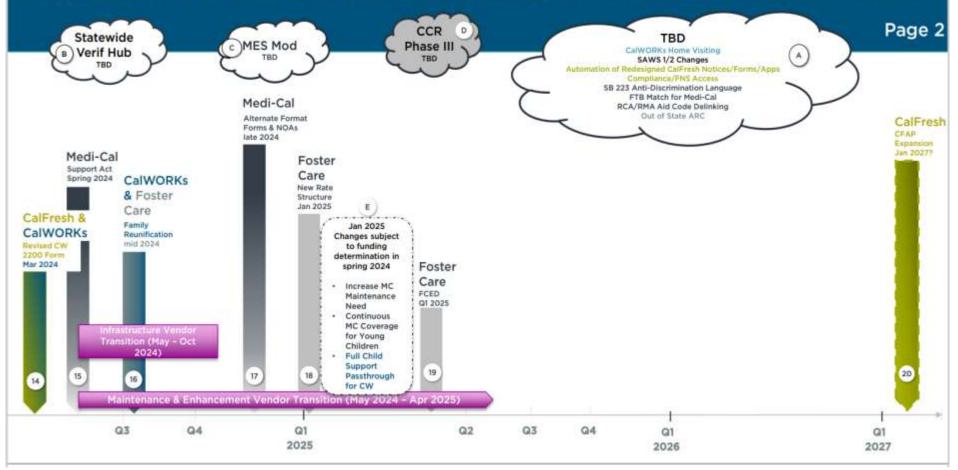
10 - Last year's budget eliminates the Medi-Cal asset limit as of January 1, 2024.

11 - CalSAWS is planning to automate spousal impoverishment provisions as of January 2024.

12 - The budget includes the expansion of Medi-Cal to adults 26-49, without regard to immigration status, no later than January 1, 2024.

13 - CalSAWS is planning to automate the discharge of non-fraudulent CalWORKs overpayments when the responsible individual has been off CalWORKs for 36 consecutive months in January 2024.

Key Upcoming SAWS Initiatives, Policy Changes & Related Projects



Notes on the SAWS Policy slide, continued

General Notes:

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- Clouds represent areas where timing is less certain and may not correlate to the timeline

Specific Notes and Key to Acronyms:

14 - CalFresh and CalWORKs are anticipating automation of a revised CW 2200 form in March 2024.

15 - CalSAWS is planning to automate the changes to align with the federal Support Act in spring 2024.

16 - Depending on when final policy is provided, and the complexity of that policy, CalSAWS is anticipating that automation to support cash payments to families in Family Reunification will be completed in mid-2024.

17 - CalSAWS is anticipating a request from DHCS to automate support for alternate format forms and NOAs and looking to target a late 2024 implementation.

18 - The budget moved the implementation of a new Foster Care rate structure to January 1, 2025. CaISAWS will need the policy letter on the new structure at least a year in advance to allow time for automation.

19 - While the CaISAWS and CARES teams are still working to finalize schedules, CaISAWS is anticipating that FCED functionality will need to be available during the first quarter of 2025.

20 - The Governor's Budget proposes delaying the implementation of the CFAP Expansion to January 2027. If complete and final policy is provided by July 1, 2023, the earliest implementation date that CalSAWS can support is October 1, 2025.

- A Numerous additional policy changes are pending which will require SAWS changes. Most of these are pending policy guidance.
- B HHSA plans to implement a hub that would support electronic verifications for CalWORKs & CalFresh & Medi-Cal.
- C The MES Modernization effort is expected to require significant coordination with SAWS as MEDS is modernized.

D - CCR Phase III is expected to include additional changes to support CCR, primarily changes to reporting.

E - The budget included three policy changes targeted for January 2025 that are subject to a funding determination in spring 2024. Without pre-work, this will not allow sufficient time for automation.

- An increase to the Medi-Cal maintenance need
- Continuous Medi-Cal eligibility for children under age 5
- Full passthrough of child support to CalWORKs recipients

Wrap up



Appendix

- 2022 Policies Completed
- Existing Policy Commitments



Completed State Policy Commitments – 2021-22

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

2023 – 2024 Policy Changes In Process

Program	Policy Item	Implementation Month
CalFresh	Telephone based service model in all counties, supporting telephonic signatures for CalFresh applications, recertifications, and SAR 7s	CalSAWS – Completed CalWIN counties complete as they migrate
Medi-Cal	Special flyer add to the Medi-Cal Renewal packets. This flyer will be added for12 months, ending 3/31/2024	April 2023
Medi-Cal	CalSAWS Central Print will use yellow envelopes for Medi-Cal Renewal packets starting 4/1/2023. The use of the yellow envelope will continue for 12 months, with a target end date of 3/31/2024	April 2023
Medi-Cal	ACWDL 22-01- Updated Discontinuance NOA MC 239 - Over Income and Not Otherwise Medi-Cal Eligible	May 2023
CalFresh/CalWORKs / Medi-Cal	Release of Information	May 2023

2023 – 2024 Policy Changes In Process

Program	Policy Item	Implementation Month
Medi-Cal	End Resetting the Medi-Cal Renewal Due Dates per end of Continuous Coverage	June 2023
Medi-Cal	Management reports to assist counties with continuous coverage unwinding	June 2023
CalFresh	Update the Transitional Nutrition Benefit Recertification to be every 12 months	July 2023
Foster Care	Early Infant Supplement AB 366/AB 153	July 2023
CalFresh	Overissuance Compromise for Household with Elderly/Disabled Member/ SB 490	September 2023
CalFresh	Transitional Nutrition Benefit Recertification Period Change	November 2023

2023 – 2024 Policy Changes In Process

Program	Policy Item	Implementation Month
Medi-Cal	Eliminate Non-MAGI Asset Limit	January 2024
Medi-Cal	Adult Expansion 26-49	January 2024
Medi-Cal	Juvenile Support Act Federal Support Act/ W&I Code 14011.10	January 2024
Medi-Cal	Spousal Impoverishment	January 2024

2024 – 2025 Policy Changes In Process

Program	Policy Item	Implementation Month
Medi-Cal	Alternate Format Forms & NOAs	Late 2024 pending confirmation from DHCS by fall 2023
CalFresh/ CalWORKs	AB 2413/AB 79 Pre-populate SAR 7 form	Late 2024 pending receipt of final policy 14 months prior to policy effective date
CalWORKs	Overpayment Discharge ACL 19-102	January 2024
CalWORKs	Child Support Pass Through – Former Recipients	January 2024
CalWORKs	Family Reunification SB 1341	July 2024 pending receipt of final policy by 6/30/2023
CalWORKs	Child Support Pass Through – AB 207 – Current Recipients	January 2025 pending legislative action to fund and receipt of final policy by 11/1/2023
Foster Care	New Rate Structure	January 2025 pending receipt of final policy by 1/1/2024
Foster Care	Foster Care Eligibility Determination (FCED)	Early 2025
CalFresh	Food for All - CFAP Expansion	January 2027 per Governor's budget Pending receipt of final policy by 1/31/2025
All	Statewide Verification Hub	TBD

Return Mail



Return Mail Current Process

- Address verification is performed in CalSAWS at the time the address is entered (not at the time of mailing of the correspondence)
- Address verification is not performed if the address arrives via an interface
- Any mail piece which is undeliverable or has a forwarding address on file is returned as a physical mail piece (with the USPS yellow sticker) to the return address (County)



Return Mail Potential Functionality

- USPS has two services to electronically determine if mail will be returned:
 - Coding Accuracy Support System (CASS) USPS service that returns a properly formatted address or an indication that an address is undeliverable
 - National Change of Address (NCOA) USPS service that returns the data for a name/address that has a change of address on file
- USPS electronically returns the response for each address submitted effectively identifying mail that will be returned with a yellow sticker



Return Mail Potential Functionality



- Mail pieces identified as return mail (via the authoritative electronic result from USPS):
 - Mailed to meet current guidance regarding the need to mail the correspondence
 - Report would be provided to the County identifying the client and correspondence that will not be delivered along with the USPS response information
 - Potential to interface with CalSAWS to create a task for the worker instead of a report
 - USPS would return the mail piece typically within 2 to 4 weeks following mailing
 - Returned mail pieces with yellow stickers could be immediately destroyed

Future Wave Readiness

- Waves 3 5 Readiness
- Waves 5 and 6 Risk Summary
- Conversion Downtime Estimates



Executive Summary: Wave 3 – 5 Readiness Project Readiness Areas and Categories [as of 4/7/2023]

Readiness Area*	Readiness Category	Wave 3	Wave 4	Wave 5
	Deploy CalSAWS Releases 23.0#	С	G	NS
	Contact Center Readiness	G	G	G
Application	Imaging Readiness	G	G	G
	BenefitsCal Readiness	G	G	NS
	Central Print Readiness	G	G	G
Integration	County Interface Partner Test (IPT)Execution	С	Y	NS
integration	State Interface Partner Test (IPT) Execution	С	G	NS
Conversion &	Defects Resolution	Y	G	NS
	EDBC Match – Auto Review Rates	G	G	NS
CalWIN Migration	Mock Cutover	С	G	NS
Planning	Cutover Window	Y	G	NS
Teehniegi	County Network Connectivity	С	G	G
Technical	Performance Testing	G	G	G
Training	Wave County Classroom Set-Up	С	G	NS
nannig	WBT Training Delivery	G	G	G
	ILT Training Delivery	G	NS	NS
	Change Discussion Guides (CDGs)	С	G	G
	Communications	G	G	G
Organization	Business Process Reengineering	С	С	С
-	Configuration	С	G	G
	Process Simulation	С	G	NS
	Implementation Planning	G	G	G
	County Prep	G	G	NS
Implementation	Pre and Post Implementation Support	G	G	G
	Help Desk	С	G	G
	County Ad Hoc Reports	Y	G	G

County Readiness Summary: Wave 3, 4, and 5 Readiness [as of 4/7/2023]

		Wave 3	-			Wave	e 4				Wave 5	
Readiness Area	Orange	Santa Barbara	Ventura		San Diego	San Mateo	Santa Cruz	Solano		Alameda	Fresno	Sonoma
Application	G	G	G		G	G	G	G		G	G	G
Integration	С	С	С		G	G	G	G		G	G	G
Conversion	G	G	G		G	G	G	G		G	G	G
Technical	G	G	G		Y	G	G	G		G	G	G
Training	G	G	G		G	G	G	G		G	G	G
Organizational	G	G	G		G	G	G	G		G	G	G
Implementation	Y	Y	Y		G	G	G	G		G	G	G
				NS	Not Start	ed G	On Sch	edule	Y	<14 Days La	te R	>=14 Days L

Wave 3 County Readiness Checklist Activities by Status (as of 4/10/23)

Status	00 All Counties	06 Orange	07 Santa Barbara	08 Ventura	Wave 3 Counties	T:
COMPLETED	11	544	500	488	132	1675
IN PROGRESS	0	86	83	87	31	287
NOT STARTED	2	55	61	62	36	216
Total Unique Issues:	13	685	644	637	199	2178

Wave 4 County Readiness Checklist Activities by Status (as of 4/10/23)

Status	00 All Counties	09 San Diego	10 San Mateo	11 Santa Cruz	12 Solano	Wave 4 Counties	T:
IN PROGRESS	3	80	92	87	90	24	376
NOT STARTED	1	178	187	181	182	117	846
COMPLETED	27	333	346	358	354	24	1442
Total Unique Issues:	31	591	625	626	626	165	2664

Wave 5 County Readiness Checklist Activities by Status (as of 4/10/23)

Status	00 All Counties	13 Alameda	14 Fresno	15 Sonoma	Wave 5 Counties	None	T:
IN PROGRESS	2	126	127	114	7	0	376
NOT STARTED	1	222	208	208	148	4	791
COMPLETED	8	332	325	336	18	0	1019
Total Unique Issues:	11	680	660	658	173	4	2186

County Readiness Highlights

Wave 3

 Implementation Readiness – Coordination with Gainwell for prioritized reports. Orange identified 66 reports, Santa Barbara identified 2 reports and Ventura identified 2 reports needed for Go Live

Wave 4

 Technical Readiness – as a result of Risk 281.4 for changes to the San Diego County PoP site location

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	Low	
288	Wave 6 San Francisco County – Delays in Circuit delivery		Low

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
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	Med	lium

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	Med	lium
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 3 Cutover Weekend Schedule

Go-Live Event Cutover: System Down Time Calendar

	Thursday April 20	Friday April 21	Saturday April 22	Sunday April 23	Monday April 24
CalWIN Counties (10)	C	NO changes to system	downlimes for CalWIN Counfies Business as usual	and Customers	
Orange, Santa Barbara, Ventura Customers			at 4 PM. Apply for Med⊩Cal on ⊆ AM (and then directed to Benel		100
Orange. Santa Barbara. Ventura Staff		emains available from 4PM - 5 of available beginning 4/20 c t available beginning 4/20 at		ter applications from MyBCW	4/24 by 7:30 AM Production Available
CalSAWS Customers and CBOs		BenefitsCal users, and C application	ead-only beginning 4/21 at 6 AM It is available for anonymous user CBO users without MFA enabled ns between Friday 4/21 at 3:30 Pi /24 at 5:00 AM	I to submit with Monday 4/24 df	5:00 AM 24 7:30 AM d CBOs
CalSAWS Production		PM until Mo		R <mark>not</mark> available beginning Friday 4/21 Center available (limited) beginning maging is view/read only.	
CalSAWS: LMS, PRT, Sandbox, Training		NO changes to system	downtimes for CalSAWS PRT and	I LMS for CalSAWS County Staff	

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 is ongoing and targeted for implementation with Wave 4
- Mock Cutovers will be executed to confirm the improvements and finalize the Cutover schedule

Next Steps:

- » Continue technical validation and Conversion ODI Tuning
- » Confirm Wave 4 timings based on the Mock 4B Cutover
- » Provide updates at monthly PSC and JPA meetings

BenefitsCal Update

- 23.05 End to End County Validation
- User Centered Design (UCD) Topics
 and Public Comments
- Training Site Status Update
- Update on BenefitsCal Adoption



CalSAWS County Validation End to End Validation

- Start end to end County Validation with the 23.05 release, which includes Release of Information (ROI)
- ROI functionality demonstration was done for the County Validation staff on April 4th
- County Validation period 4/10-4/21
- Imperial, Merced, Los Angeles, Riverside and San Bernardino

BenefitsCal Update

Training Environment (County & CBOs)

Training environment aims to establish a place where CBOs and Counties can have the ability to get familiar with BenefitsCal production functionality

Support Model for the Training Environment

CBO Users

- Access environment with an access code, shared via email to active CBO Managers
- ✓ Pre-approved CBO accounts created for ease ✓ of access and shared via email
- Includes production features for CBO functionality (excluding chat)
- Data refresh follows existing training refresh schedule (i.e., quarterly)
- Report technical issues through AskCalSAWS channel
- Pre-release updates will be shared through bimonthly trainings, Quick Reference Guide or YouTube
- ✓ May 2023

County Users

- Access environment with an access code. and shared through Training Committee
 - Users follow self-served account creation steps to create test accounts
- Includes production feature set (excluding chat)
- Data refresh follows existing training refresh schedule (i.e., quarterly)
- Report technical issues through existing BenefitsCal and CalSAWS support channels
- Pre-release updates will be shared through bimonthly trainings, Quick Reference Guides or YouTube
- 🖌 May 2023

User Access

Features/

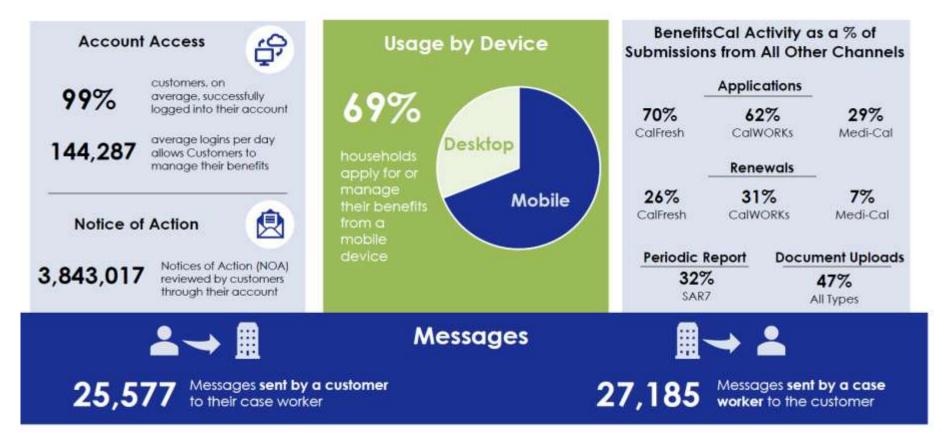
Data

Support

Target

BenefitsCal Update Adoption from September 2021 to February 2023

BenefitsCal Quarterly Usage report published under CalSAWS.org on March 31st, 2023



*Data as of Feb 2023, updated version of the Quarterly Usage Report including March 2023 data will be published on or after April 15 2023

BenefitsCal – What Are We Seeing/Hearing?

Customers have highlighted Five common experiences.

OBSERVATION

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Images uploaded via BenefitsCal were reported as **not visible** to the worker.

FINDINGS AND HOW IT'S BEING ADDRESSED?

Images determined to be available in CalSAWS. Imaging **Job Aids** provided to county RM's to address worker **training gap**.



Users do **not receive** an **error message** when a document **fails** to **upload** at the customer end.



User-uploaded documents are sometimes not accessible to the case workers.



Sometimes, the **renewal link** appears 24-48 hours after a successful case link.



Customer challenges around **verification code** usage during **account creation**.

A **fix** is prioritized in the April release for a **user error message** display when document upload fails.



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> A solution is being explored to **restrict** uploading **encrypted** files in BCAL through AWS or other SAAS.



Improve system feedback with a **display message** to enhance usability starting in April.

Im sc

Improve system feedback with a **tool-tip** and **screen modification** to enhance usability starting in May.

Release and Policy Update

- Continuous Coverage Unwinding
- Medi-Cal Texting
- BenefitsCal



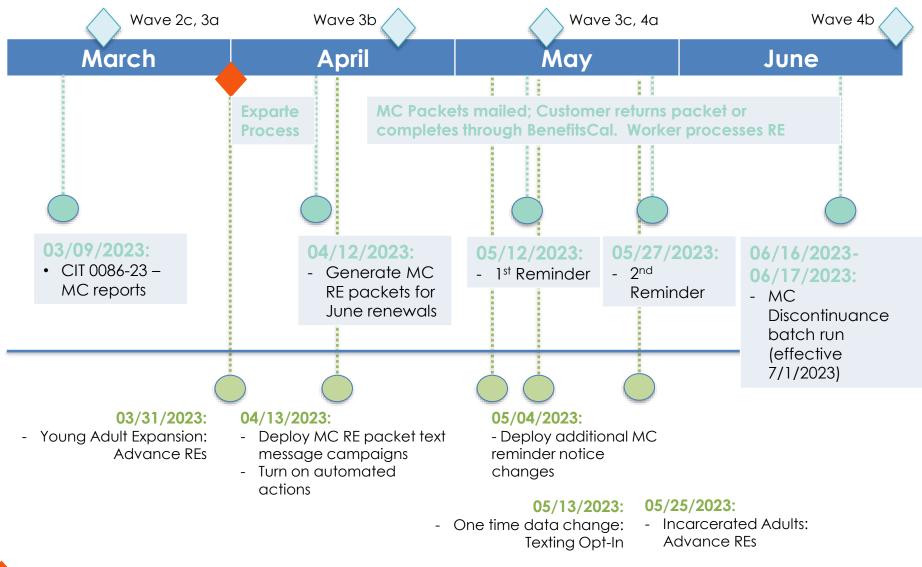
Policy Update

Continuous Coverage Unwinding – DHCS Updates

- Continuous coverage unwinding period began April 1, 2023
- CMS Deemed California Compliant with Renewal Requirements
 - On March 20, CMS determined that California is compliant with all applicable requirements in the Consolidated Appropriations Act of 2023 for receiving increased Federal Medical Assistance Percentage (FMAP) for the continuous coverage unwinding and resumption of normal business operations.
- Asset Waiver Flexibility Updates (<u>MEDIL I 23-19</u>)
 - On March 29, 2023, the DHCS received CMS approval under Section 1902(e)(14)(A) authority on waiving the asset test at redeterminations for members enrolled on a Non-Modified Adjusted Gross Income (Non-MAGI) Medi-Cal.
- COVID-19 Uninsured Group
 - The program will end on May 31, 2023.
 - DHCS developed an <u>outreach toolkit</u> with key messaging for individuals currently in the program.

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

CalSAWS Texting Solution

Automation Updates

- Automated Actions (AA): turn on AAs and deploy MC AAs – 4/13/2023*
- Opt-in data change and online changes: design in process, targeting mid May. A CIT will be prepared for these changes

Budget Update

• State partners working on the request for additional funding for SFY 23/24

Scaling Update

- Texting service: the request to increase the monthly volume is in process
- Batch: testing will be conducted in conjunction with the one time opt-in data change

* Automated actions are configurable through the front end of the CalSAWS system. Counties can designate select staff to have access to these pages to turn on/off automated actions.

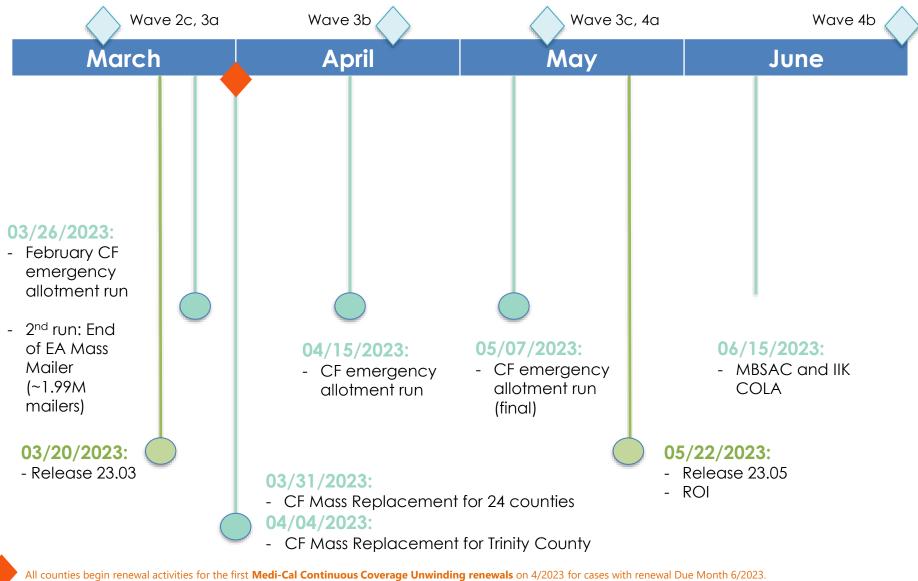
CalSAWS Release and Policy Update Continuous Coverage Unwinding – FCC Clarification

CalSAWS Texting Solution

- CA-256904: Opt-In data change for existing customers
 - For any phone number listed as type "Cell", "Home" or "Main", a onetime data change will be run to Opt-In the cell phone for texting and set the text message status to "Verified"
 - Only one phone number opted-in per person
 - Exclude duplicate phone numbers which have already been opted-in
 - Exclude duplicate phone numbers when one of the duplicate records has a Status of 'Opted-Out' or 'Undeliverable'
 - Exclude Foster Care primary applicants
 - Add a journal to each case where the data change is executed
 - Additional online page changes for new cell
- CA-256904: Opt-In online page changes for new customers, new phone numbers
 - + Updates to New Person Detail and Contact Detail pages
- Meeting held with CDSS and DHCS to confirm policy guidance for texting opt-ins
 - DHCS guidance provided via MEDIL 23-12
 - CDSS developing updated guidance

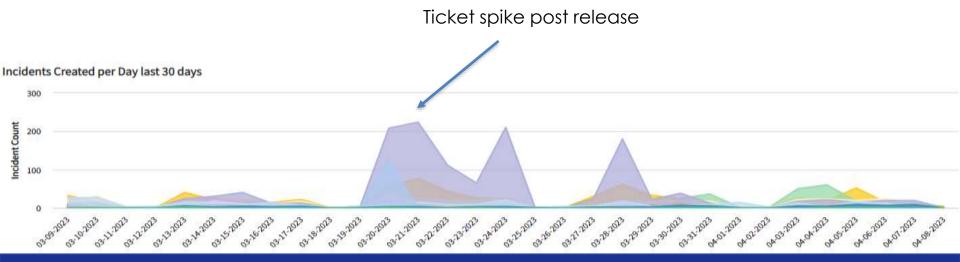
CalSAWS Release and Policy Update

CalSAWS Release Highlights



CalSAWS Release and Policy Update CalSAWS Release Highlights – 23.03 Recap

- Scope: 55 SCRs and 30 production defects
- Post Release update: 1 of the 30 production defects causes UEID across various application pages
 - This item was logged as a result of a security finding and impacted every page in the application. Security related items have limited information in Jira, due to their sensitive nature
 - 22 defects / 166 UEIDs were resolved in lower level automated and manual testing prior to deployment to production
 - Defect CA-252135 was in all system test environments for the duration of the system test, independent test, and county validation cycles



CalSAWS | JPA Board of Directors Meeting

CalSAWS Release and Policy Update CalSAWS Release Highlights – 23.03 Recap

Post 23.03 action items

Resolve

- 17 of 17 defects have been deployed to resolve UEIDs
- Re-tested the top 100 pages that cover 85% of the February monthly online transaction volume. Two new items were found and resolved
- Team continues to monitor ticket queues for any new items

Reflect

- Accenture drafted a Root Cause Analysis. This is in review
- Clearbest conducted an initial retrospective to identify improvement opportunities, including transparency, communication, and impact analysis

Adjust

- Update regression scripts
- Full list of actions to be documented as part of the retrospective and RCA

CalSAWS Release and Policy Update CalSAWS Release Highlights - CalFresh

 Mass replacements approved by FNS for residents that suffered food losses as a result of power outages and flooding due to severe winter storms

Mass replacement - 50 percent of..

regular benefits for households that were issued February 1, 2023, through February 10, 2023

emergency allotment benefits for households that were issued February 4, 2023 and February 11, 2023

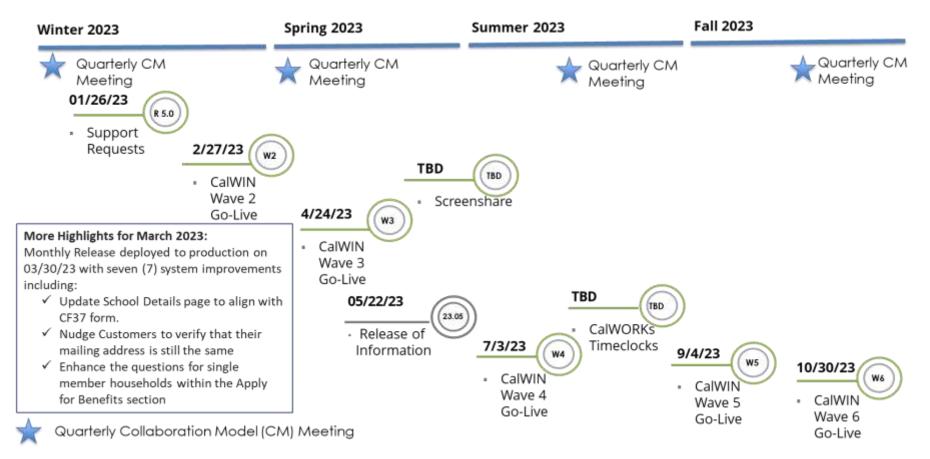
120 zip codes in 28 counties

CalSAWS Counties – Amador, Butte, Calaveras, El Dorado, Humboldt, Lake, Madera, Mariposa, Mendocino, Monterey, Napa, Nevada, Placer, Plumas, Shasta, Sierra, Siskiyou, Sutter, Tehama, Trinity, Tulare, Tuolumne, and Yuba

CalWIN Counties – Fresno, San Luis Obispo, Santa Barbara, Santa Clara, Santa Cruz CalSAWS Release and Policy Update CalSAWS Release Highlights - CalFresh

- Mass Replacement Trinity County
 - FNS also authorized the mass replacement of 60 percent of regular benefits for households that were issued March 2023, in the six zip codes. Replacement benefits available on 4/5/2023
- Disaster CalFresh
 - Impacted Counties: Kern, Mariposa, Monterey, San Benito, Santa Cruz, Tulare, and Tuolumne Counties
 - Plan has been approved by FNS
 - Benefit period: February 21, 2023, through March 22, 2023
 - Application Period:
 - + Monday, April 17, 2023, to Friday, April 21, 2023
 - + Monday, April 24, 2023, to Tuesday, April 25, 2023

BenefitsCal Upcoming Release Calendar



Technical Operations Update

• Production Outage Calendar



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

Su	unday	M	londay	Tu	Jesday	We	dnesday	Th	nursday		Friday	Sc	aturday
26	$\sum_{i=1}^{n-1} \frac{1}{n_{n+1}} \sum_{i=1}^{n-1} \frac{1}{n_{n+1}} $	27	and the second s	28	and the second s	1	24 ¹¹¹ 10, 24 ¹¹¹ 10, 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	2		3	24 ¹¹¹ 12 44 ¹¹¹ 12 4 12 12 12 12 12 12 12 12 12 12 12 12 12 1	4	
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					· · · · · ·								
	😑 Red denotes full System wide outage												
	Amber denotes System degradation or component outage												

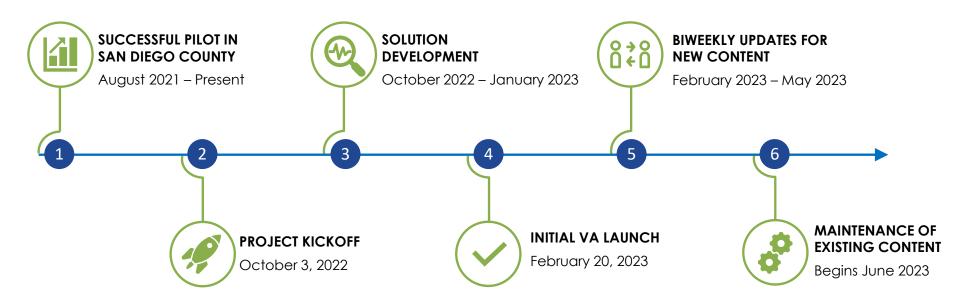
Green denotes System Available

Virtual Assistant Update



Worker-Facing Virtual Assistant Overview

The Virtual Assistant (VA) allows CalSAWS workers to access a series of **pre-defined questions and answers** designed to provide information on CalSAWS functionalities and instructions on how to perform certain job functions. Currently, the Virtual Assistant is **updated every two weeks** with new content largely based on user feedback.

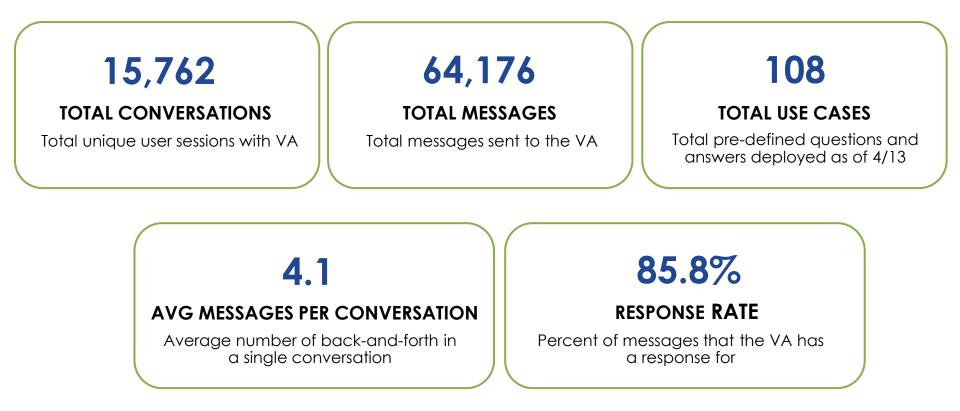


Worker-Facing Virtual Assistant Demo

Let's watch a pre-recorded demonstration of the key features within the Virtual Assistant!

Worker-Facing Virtual Assistant Statistics

Data from 2/20 Initial Launch through 4/7 11:00AM



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		
CalSAWS 23.03	6	9	245/245	9		
CalSAWS 23.05	11	9	63/87	In Progress		
BenefitsCal 23.05	9	2	119/284	In Progress		
Total	26	20	427	9		

Functional/Test Highlights

23.03 CalSAWS Complete 23.05 CalSAWS Started 23.05 BenefitsCal Started

QA Technical Reviews						
21 CalSAWS SLAs Reviewed	3 Hyland SLAs In Review	County-wide System Impacts	23 CC/Model Office Test Scripts Reviewed			

Technical Highlights

System Performance Contact Center(CC) and Imaging QA County-wide System Impacts

QA Migration Reviews						
930 Wave 2 Requirements Reviewed	158 Conversion Defects Reviewed	13 Migration Risks Monitored	7 Implementation Support Staff To Be Deployed			

Migration Highlights

Requirements and Conversion Defects Migration County Onsite/Virtual Support Lessons Learned & Retrospectives

Procurement Updates

• AWS Services Update



CalSAWS M&O Procurement Key Procurement Tasks

	M&O Procurement Event	Date			
1	Release RFP	July 6, 2022			
2	Business Proposal Due Date	January 4, 2023			
3	Price Proposal Due Date	January 18, 2023			
4	Evaluate Administrative Compliance and Firm Qualifications	January 5 – 31, 2023			
5	Evaluate Business Proposals	February 1 – July 7, 2023			
6	Conduct M&E Oral Presentations and Key Staff Interviews	June 27 – 29, 2023			
7	Conduct Infrastructure Oral Presentations and Key Staff Interviews	April 17 – 21, 2023			
8	Evaluate Price Proposals	April 26 – July 17, 2023			
9	Conduct M&E Confidential Discussions	August 2 – 3, 2023			
10	Conduct Infrastructure Confidential Discussions	June 6 – 8, 2023			
11	Issue BAFO Instructions	August 10, 2023			
12	Best and Final Offer (BAFO) Due Date	August 29, 2023			
13	Evaluate BAFOs	August 30 – September 20, 2023			
14	Evaluate Consolidated Price Proposals	September 25 – October 4, 2023			
15	Notify Bidders and Prepare for Agreement Exception Discussions	October 10 – 17, 2023			
16	Conduct Agreement Exception Discussions	October 18 – 30, 2023			
17	Issue Price BAFO #2 Instructions	November 6, 2023			
18	Price BAFO #2 Due Date	November 20, 2023			
19	Evaluate Price BAFO #2	November 21 – December 6, 2023			
20	Conduct Final Evaluation Teams Meeting	December 12, 2023			
21	Prepare, Review and Approve Vendor Selection Report	December 13, 2023 – February 7, 2024			
22	Issue Notice of Intent to Award	February 8, 2024			
23	Prepare for and Conduct Contract Negotiations	February 9 – March 8, 2024			
24	State, Federal and JPA Contract Approvals	March 11 – June 28, 2024			
25	Contingency Period	July 1 – 31, 2024			
26	Contract Start Date	August 1, 2024			

CalSAWS Procurement Changing The Way We Buy AWS Services

- New AWS Contract through the Master Intergovernmental Cooperative Purchasing Agreement with OMNIA Partners (formerly National Cooperative Purchase Alliance)
 - Tentative Submission for State review: May 1, 2023.
 - State and Federal Review: May 1 July 31, 2023.
 - JPA Approval planned for August 18, 2023 for an effective date of September 1, 2023.

Update on Key State IV&V Activities



Wave 3 Go-Live Readiness: IV&V Observations

Highlights

Application

Monitoring:

 Image migration from CalWIN to CalSAWS

Concerns:

None

Risks:

• None

1



Monitoring:

- Testing progress on the open Conversion defects targeted for completion before Go-Live.
- Cutover weekend activities and communication

Concerns:

None

lssue:

#258.3: 84-hour CalWIN Conversion Cutover Window

Risks:

#280: Unresolved Go-Live Dependent defects

Overall Readiness Confirmation Status:



New Item

. . .





Monitoring:

- Ongoing Batch Performance Tests
- Ongoing Imaging Performance
 Tests

Concerns:

• None

Risks:

• None





Wave 3 Go-Live Readiness: IV&V Observations

Progress on WBTs and ILTs for

Wave 3 Counties

Highlights

Organizational

Monitoring:

• None

Concerns:

None

Risks:

• None

h



Monitoring:

•



On Track

Slightly Behind

Overall Readiness Confirmation Status:

Implementation

Off Track



. . .

New Item

Monitoring:

Progress on County Prep Activities

Confirmed

- CNC, TOSS and IPOC meetings
- Ad-Hoc Reports Refactoring

Concerns:

• None

Risks:

#269.3: Ad-hoc Reports Refactoring #279.3: County reconciliation and submission of State and Fiscal reports #285.3: Preparing CalWIN counties to operationalize CalSAWS after their Go-Live

• None

Risks:

• None

CalSAWS | CalSAWS Green Light



Adjourn Meeting

