



CalSAWS | Project Steering Committee Meeting

April 20, 2023



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

Action Items

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

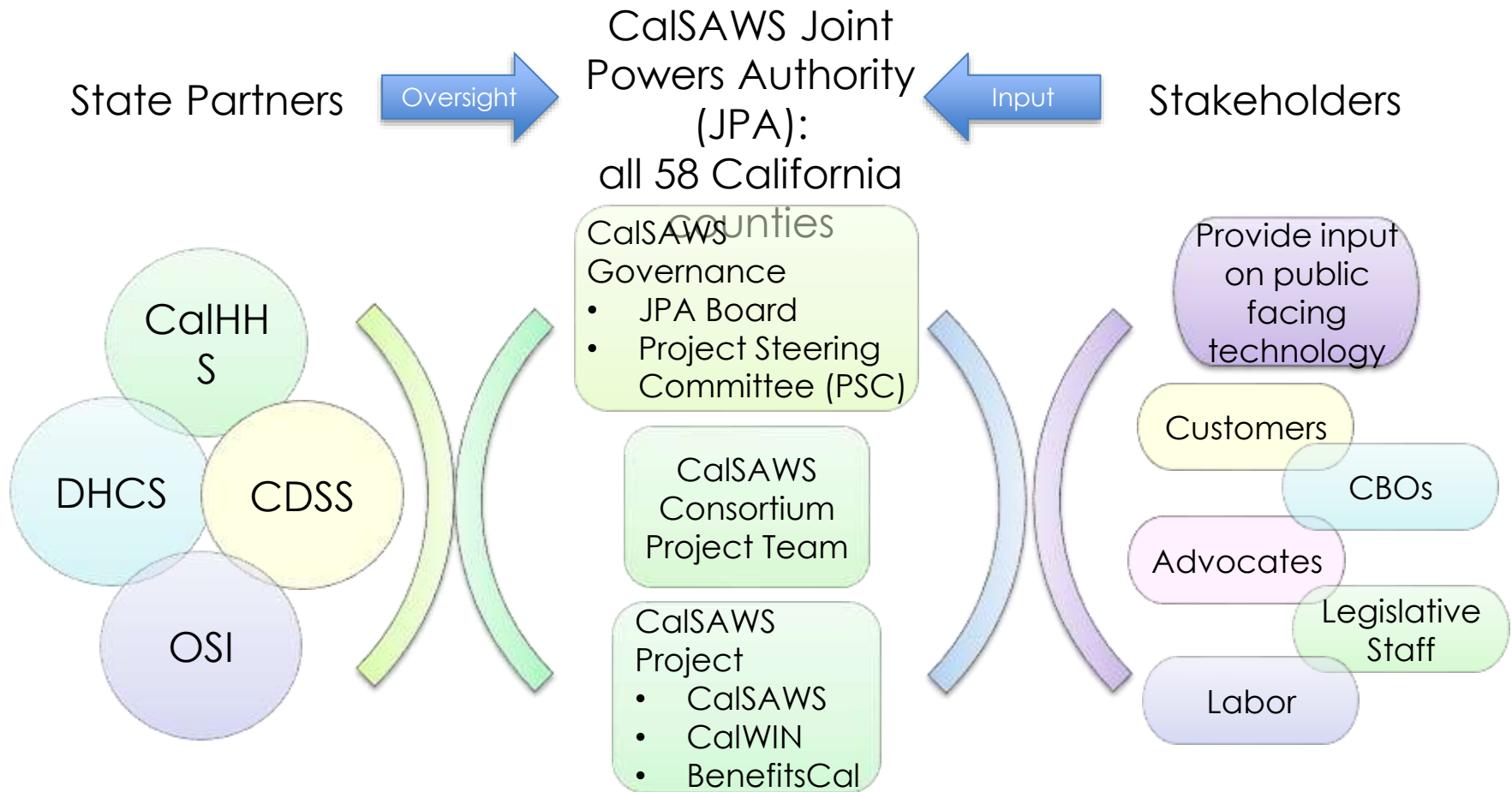


Informational Items



Legislative Staff Briefing

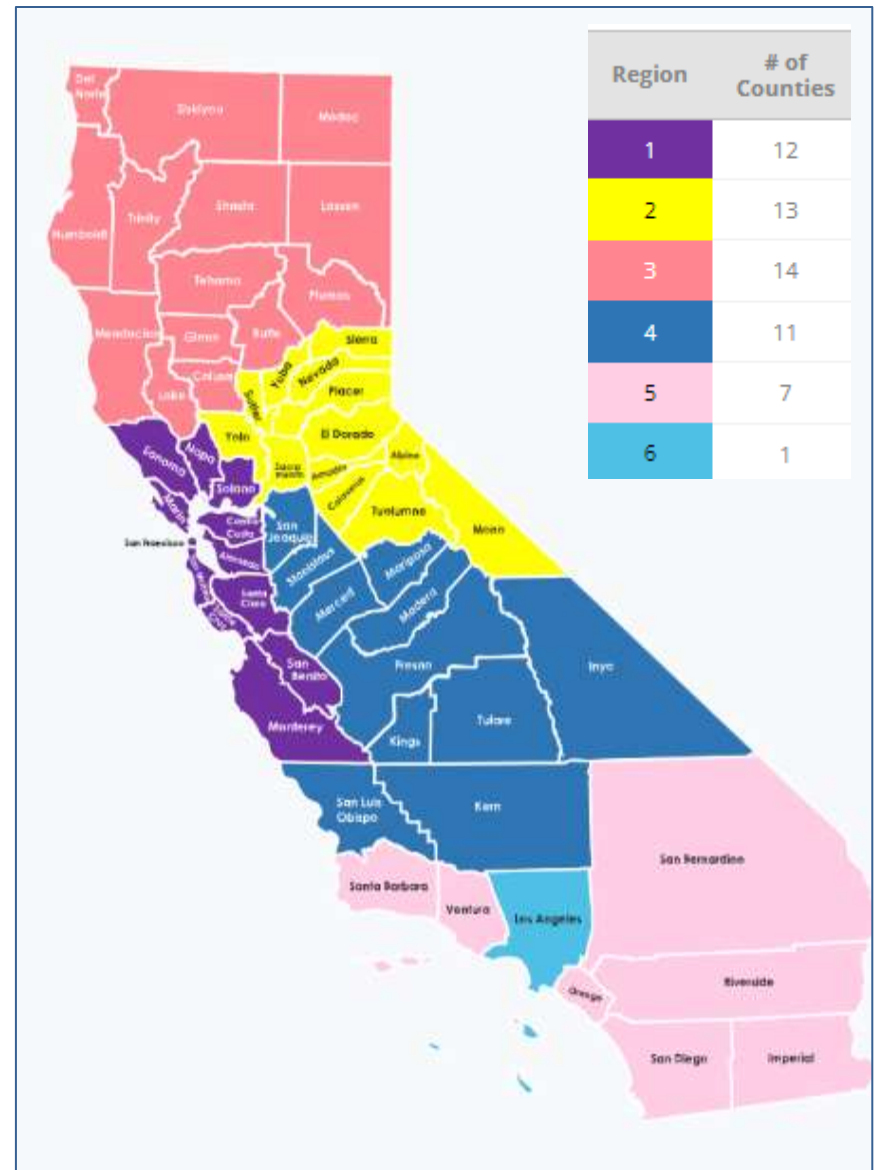
CalSAWS Ecosystem



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.

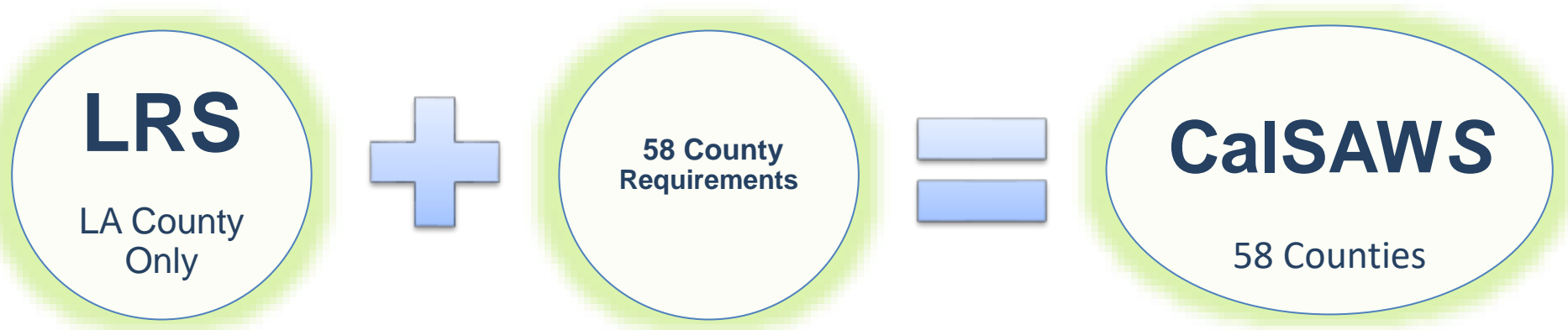


Journey to CalSAWS

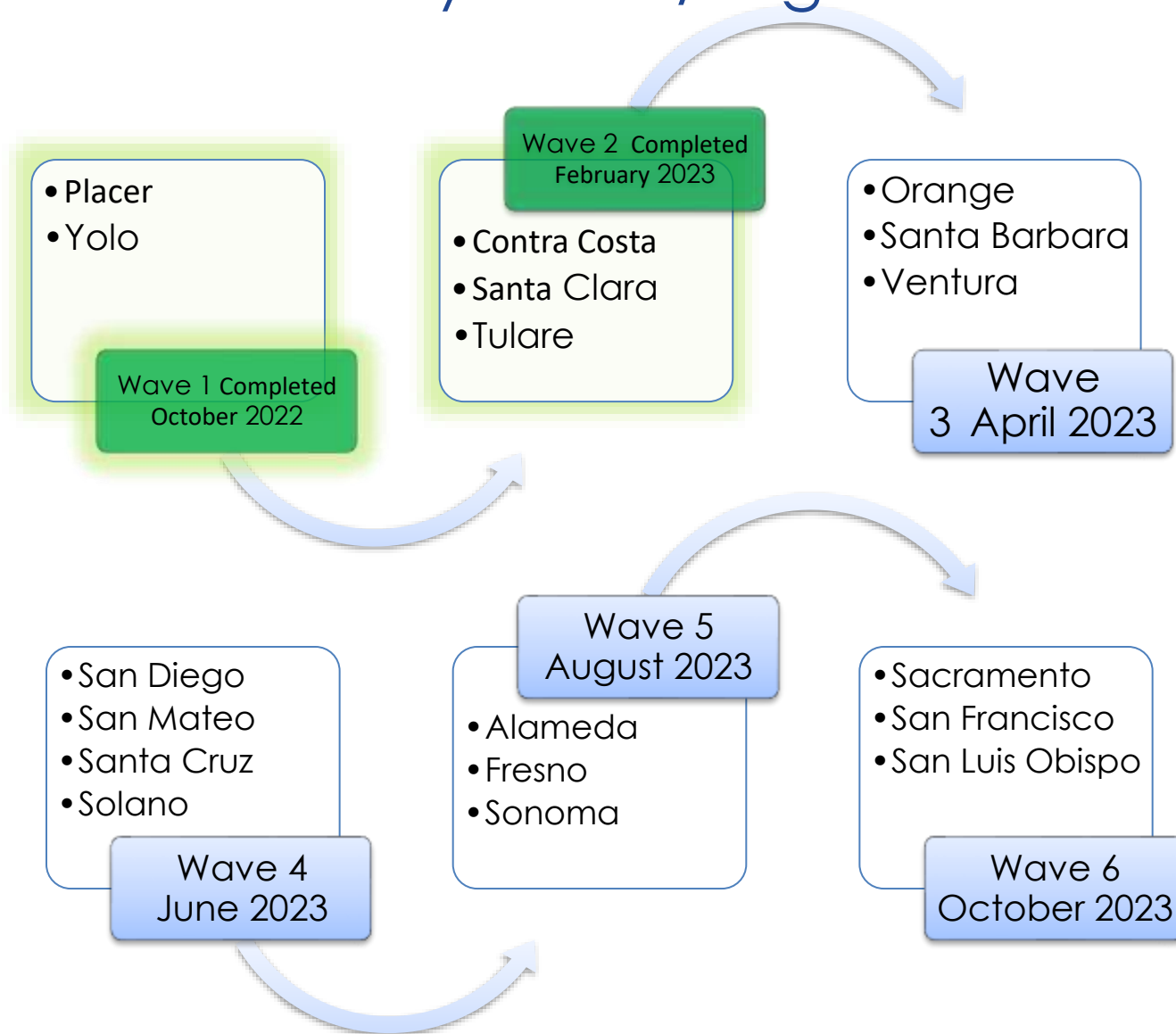
California has a Federal mandate to expand LRS (the SAWS for LA county only) to all 58 Counties by the end of calendar year 2023. At the time of the mandate, 3 systems were operating, C-IV, CalWIN and the LA precursor to LRS.

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



**\$14.3B
Benefits
provided¹**



**\$13.6M
CalFresh Mass
Replacements³**



**\$3.3B
CalFresh
Emergency
Allotments²**



**2023
Disaster
CalFresh
Benefits
\$509K⁴**

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

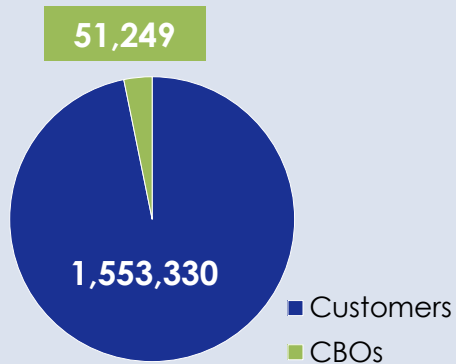
BenefitsCal is a public facing website that allows customers to apply for and manage their benefits. It also allows for Community Based Organizations (CBOs) to assist customers with these tasks.

Total BenefitsCal Applications since 9/2021

1,642,692

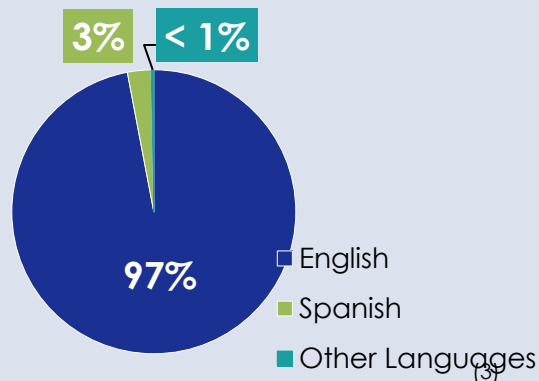
households took the first step to receive food, cash, and/or medical assistance.

Number of Applications Submitted by User Role



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

Percent of Applications Submitted by Language



Language % is consistent with non-BenefitsCal submitted 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 self-service portal**



Threshold Languages

Available in 20 Languages:
Arabic, Armenian, English, Farsi, Hindi, Hmong, Khmer, Japanese, Korean, Lao, Mien, Portuguese, Punjabi, Russian, Spanish, Tagalog, Thai, Traditional Chinese, Ukrainian, Vietnamese



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

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

Available in [YouTube](#) today



15
Videos to Support Customers and CBOs

Note: Cumulative totals as of 3/23/2023



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

CBO Accounts Created

3,896



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

Daily Customer Password Resets

~6.5%

Customers perform password reset independently

Customer Login Rate

99.3%



Customers are able to login successfully without needing additional assistance

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

"It just seems more 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

With my husband, there 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

I like 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 Center

Page

Message Center



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 supposed to do follow-up calls that people were not wrongfully 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 1-step 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

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



Design

- 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



Develop

- 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



Implement

- 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

County Workers

131

CBO Staff

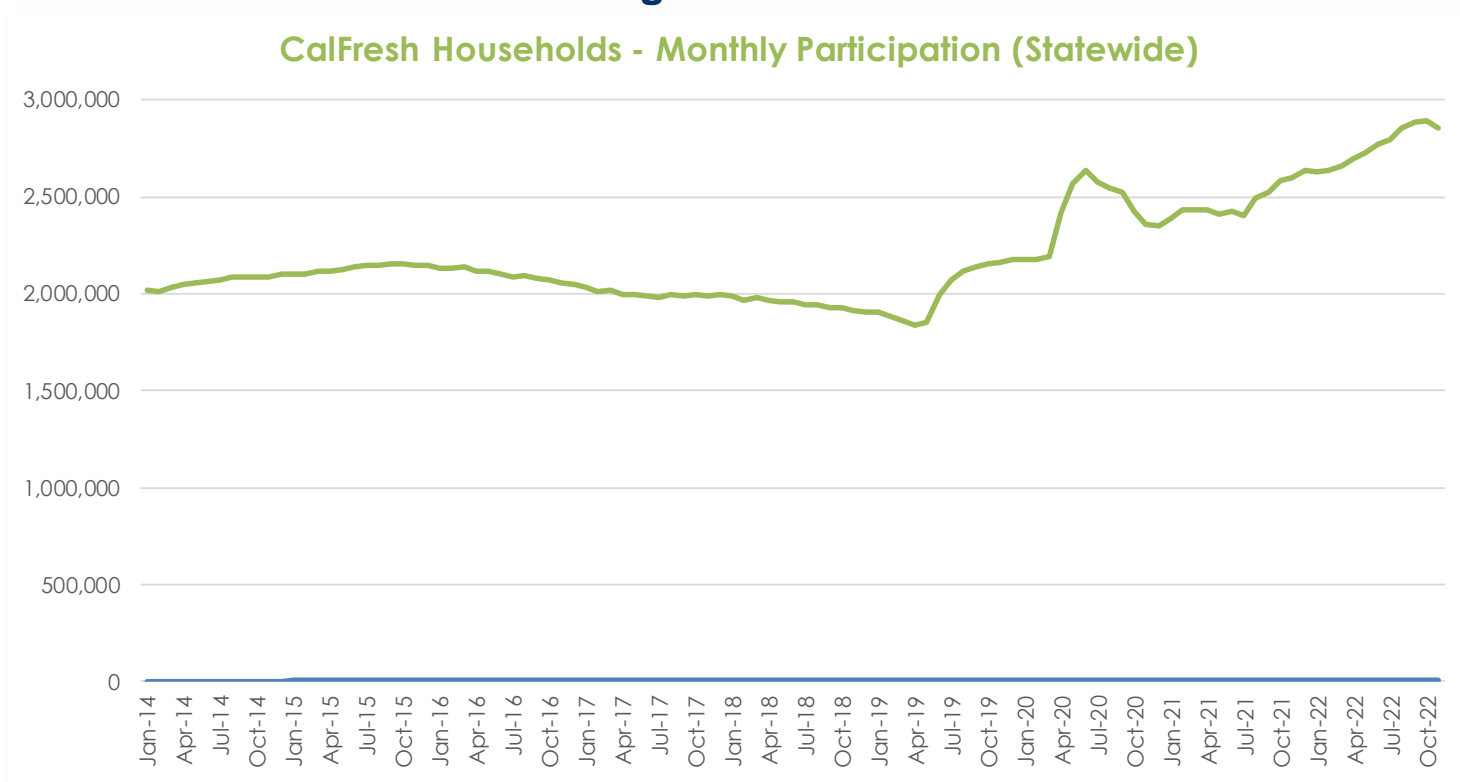
7,112

**Survey Responses from
Customers & Assisters**

CalFresh Caseload Growth – By Household

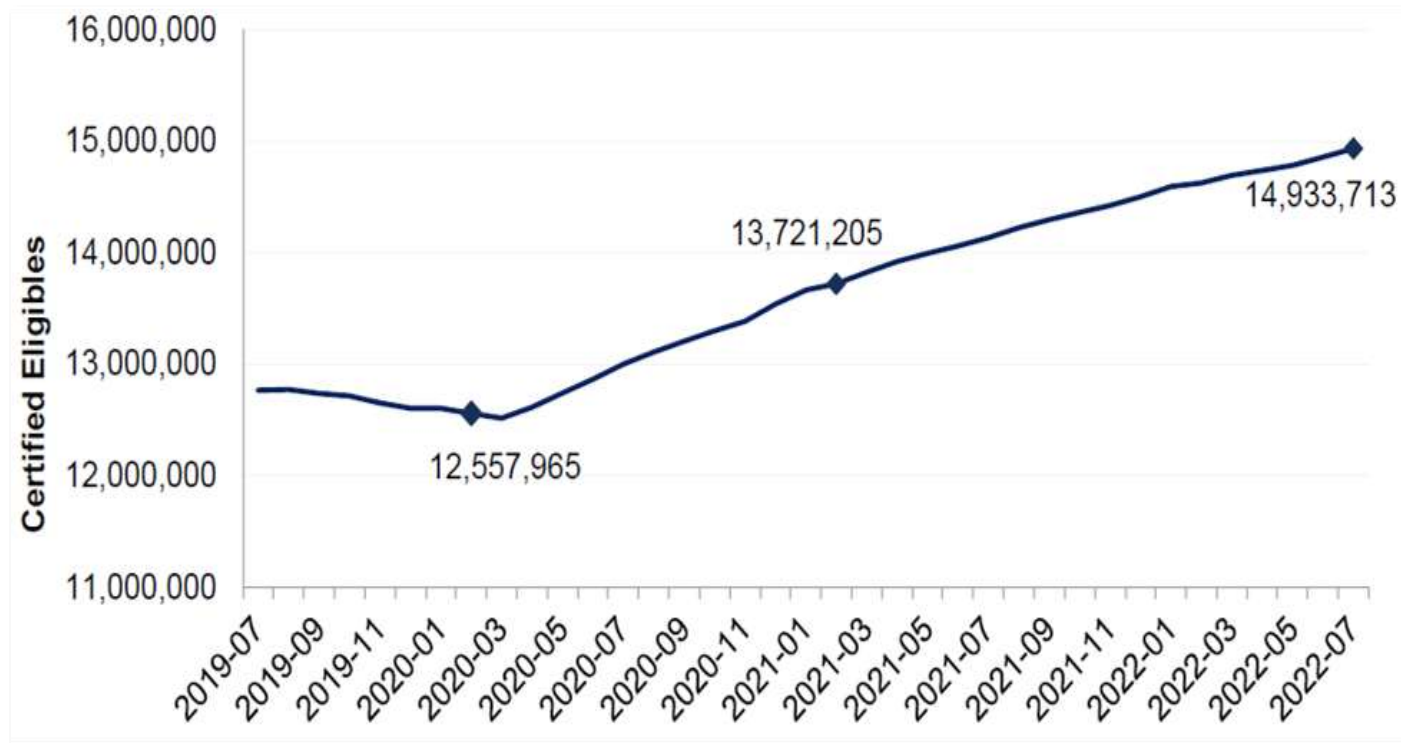
The COVID-19 pandemic, program expansions/policy changes, and outreach efforts have had a significant impact on caseload growth.

CalFresh Program Caseload Growth



- Between 01/2014 and 03/2019, CalFresh caseload **shrank 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 **shrunk 2%** (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

Stakeholder Engagement in CalSAWS Implementation of Approved Regulation and Enhancements

1 Legislation / Policy Changes

2 State Letters

- All County Letters
- All County Welfare Director's Letters / Medi-Cal Eligibility Division Information Letters
- All County Information Notices
- County Fiscal Letters

3

Final Published Letters

Stakeholder Review/Input

Stakeholder Review/Input

For Stakeholder Information



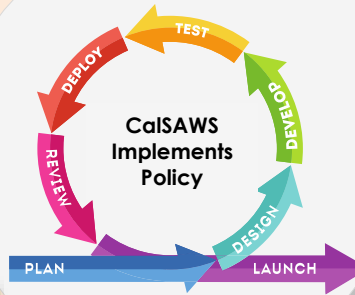
Stakeholders

Communicating and Representing Public Interest

State Policy Owner
←

CalSAWS Policy Enablement
→

Stakeholder Opportunities for Review/Input



- **Joint Powers Authority Meeting**
 - Agenda and Minutes
 - Amendments
- **Project Steering Committee Meeting**
 - Agenda and Minutes
 - System Change Planning Group
 - Change Control Board Approvals
 - Implementation Schedule
- **Quarterly Stakeholder Meetings**
- **Public Facing Technology Procurements**
- **BenefitsCal specific meetings**
 - Monthly User Centered Design, Collaboration Model, Design Review
- **Posted System Information**
 - Weekly Status Reports
 - Committee Meeting Agendas
 - Major Upcoming Release Document
 - Release Notes

Non-Public Facing

Back Office Features
Case Management
County Operational functions
Financial Mgmt. Interfaces

Public Facing

BenefitsCal
BenefitsCal Document Upload
Lobby Management
Contact Center
Interactive Voice Response



Stakeholders

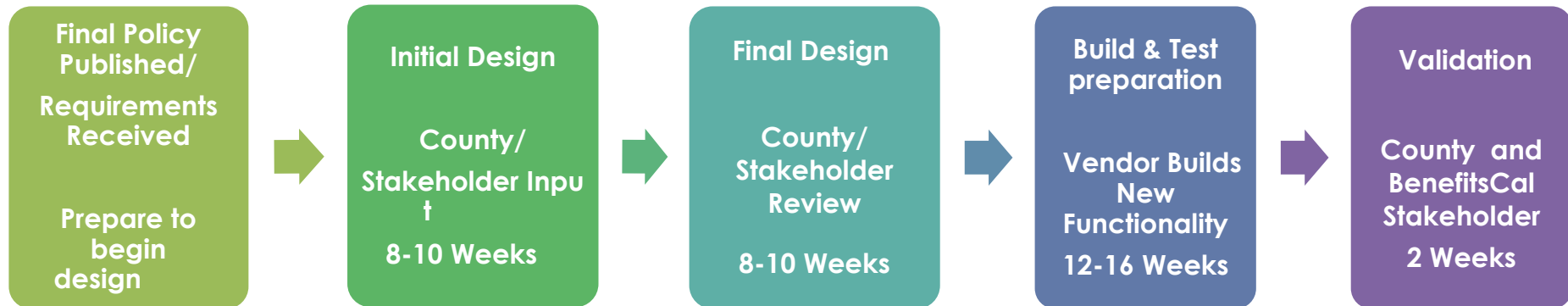
Opportunities for Stakeholder Engagement with the CalSAWS Project





Policy Implementation Timeline Examples

CalSAWS Policy Implementation Timeline*



Note: BenefitsCal only changes that do not require CalSAWS integration may implement more quickly.

Implementation timing is based on several factors including:

- **Policy Guidance:** clear & complete final state policy, including notices translated into all threshold languages, quick turn-around 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.

*Timelines vary according to complexity of the change.

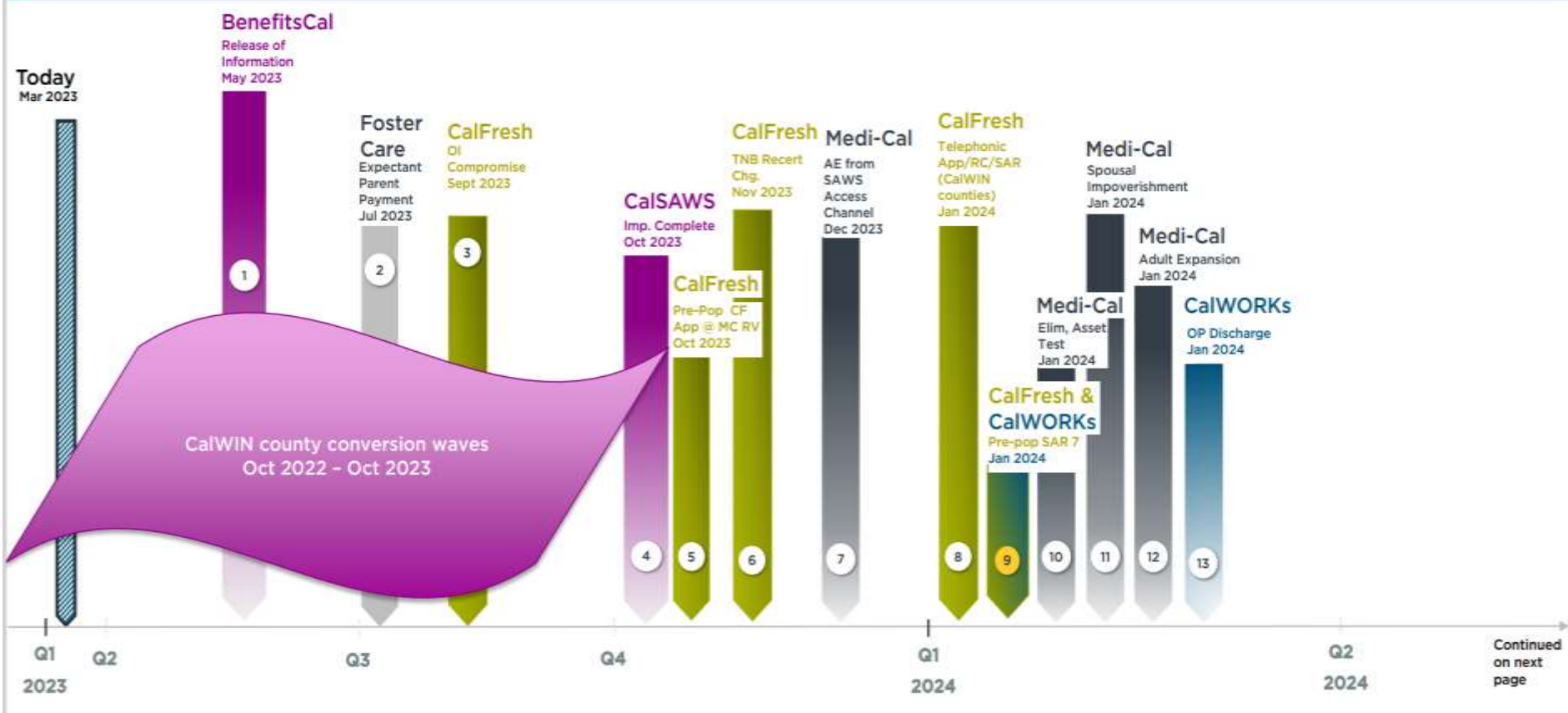
Unwinding Medi-Cal Continuous Coverage

- 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

Existing Policy Commitments

Key Upcoming SAWS Initiatives, Policy Changes & Related Projects

Page 1



Existing Policy Commitments

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.

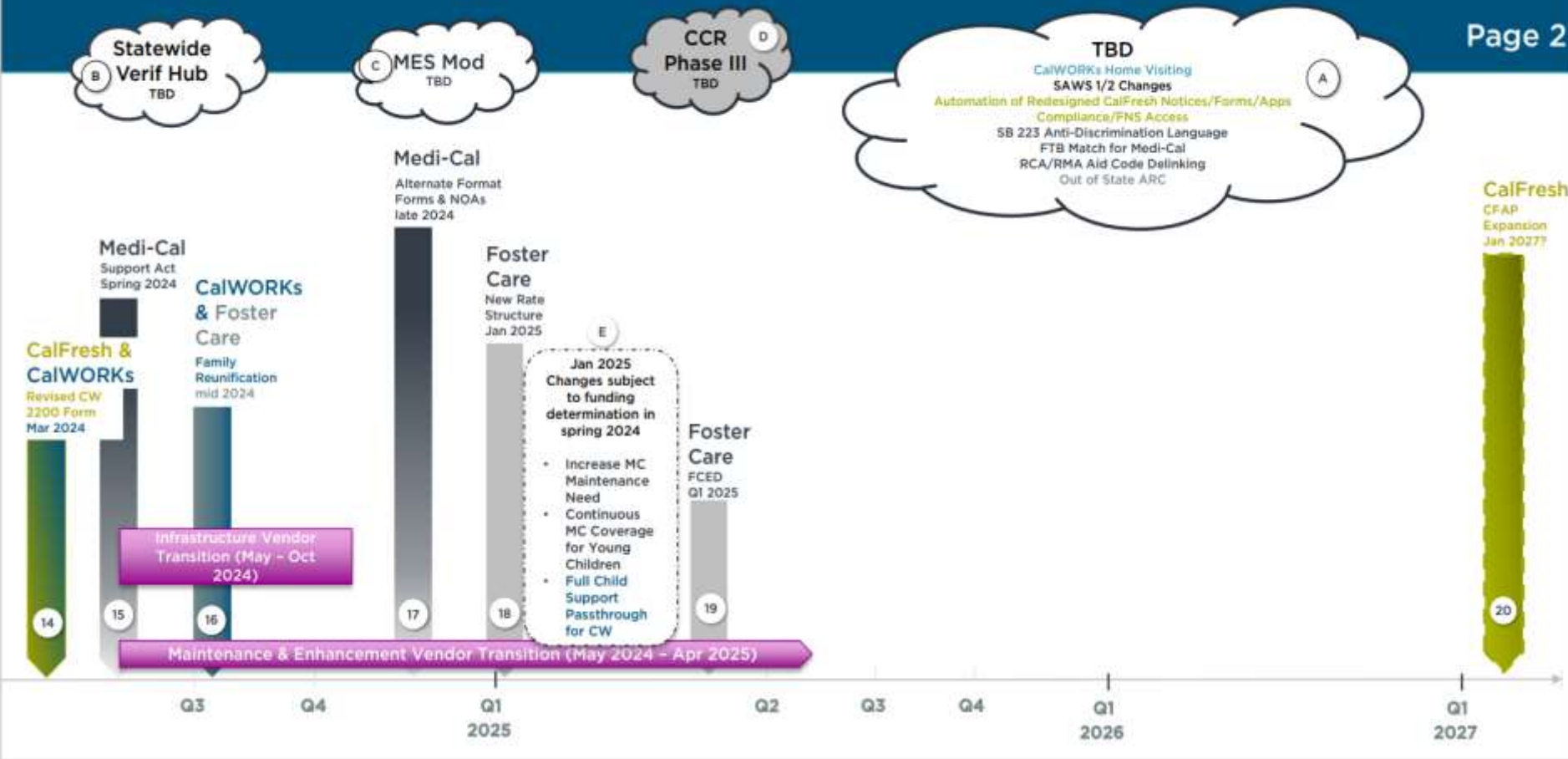
12 - The budget includes the expansion of Medi-Cal to adults 26-49, without regard to immigration status, no later than January 1, 2024.

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.

Existing Policy Commitments

Key Upcoming SAWS Initiatives, Policy Changes & Related Projects

Page 2



Existing Policy Commitments

Notes on the SAWS Policy slide, continued

General Notes:

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- 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:

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. CalSAWS will need the policy letter on the new structure at least a year in advance to allow time for automation.

19 - While the CalSAWS and CARES teams are still working to finalize schedules, CalSAWS 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 - HHS 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 for 12 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

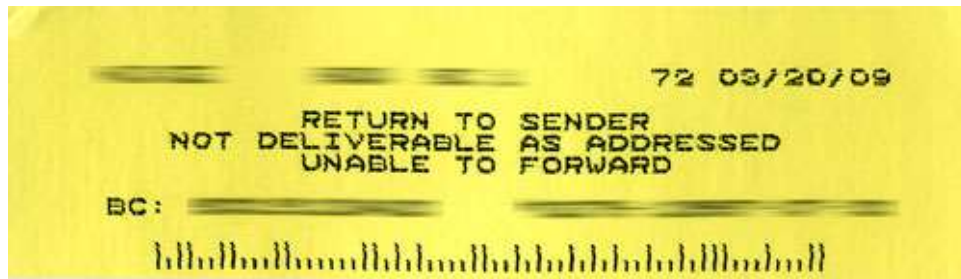


Returned Mail

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 Waves Readiness

- Waves 3 and 4 Readiness
 - Waves 5 and 6 Risk Summary
 - Conversion Downtime Estimates
-

Executive Summary: Wave 3 – 5 Readiness

Project Readiness Areas and Categories [as of 4/14/2023]

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

County Readiness Summary: Wave 3, 4, and 5 Readiness [as of 4/14/2023]

	Wave 3				Wave 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	C	C	C		G	G	G	G		Y	G	G
Conversion	C	C	C		G	G	G	G		G	G	G
Technical	C	C	C		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 Started	G	On Schedule	Y		<14 Days Late	R	>=14 Days Late

Wave 3 County Readiness Checklist Activities by Status (as of 4/17/23)

Status	00 All Counties	06 Orange	07 Santa Barbara	08 Ventura	Wave 3 Counties	T:
COMPLETED	11	562	530	502	136	1741
IN PROGRESS	0	86	70	95	31	282
NOT STARTED	2	53	56	56	32	199
Total Unique Issues:	13	701	656	653	199	2222

Wave 4 County Readiness Checklist Activities by Status (as of 4/17/23)

Status	00 All Counties	09 San Diego	10 San Mateo	11 Santa Cruz	12 Solano	Wave 4 Counties	T:
IN PROGRESS	3	82	95	87	95	24	386
NOT STARTED	1	172	179	174	171	114	811
COMPLETED	27	338	352	366	361	27	1471
Total Unique Issues:	31	592	626	627	627	165	2668

Wave 5 County Readiness Checklist Activities by Status (as of 4/17/23)

Status	00 All Counties	13 Alameda	14 Fresno	15 Sonoma	Wave 5 Counties	T:
IN PROGRESS	2	125	126	113	8	374
NOT STARTED	1	223	209	209	148	790
COMPLETED	8	335	328	339	18	1028
Total Unique Issues:	11	683	663	661	174	2192

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. Per W3 Counties, this does not impact the County's ability to go live on April 24, 2023.

Wave 4

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

Wave 5

- Integration Readiness – this is a watch item as the County continues with their API development

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	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 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)		 NO changes to system downtimes for CalWIN Counties and Customers Business as usual			
Orange, Santa Barbara, Ventura Customers		 My BCW Not available beginning 4/20 at 4 PM. Apply for Medi-Cal on Covered CA and CalFresh at GetCalFresh until Monday 4/24 at 7:30 AM (and then directed to BenefitsCal).			
Orange, Santa Barbara, Ventura Staff		 CalWIN Remains available from 4PM - 5 PM on 4/20 for workers to register applications from MyBCW  CalWIN Not available beginning 4/20 at 5 PM  OCAT Not available beginning 4/20 at 5 PM			
CalSAWS Customers and CBOs		 CalWIN is available for read-only beginning 4/21 at 6 AM, pending conversion outcomes  BenefitsCal is available for anonymous users, known users, and CBO users without MFA enabled to submit applications between Friday 4/21 at 3:30 PM until Monday 4/24 at 5:00 AM		 BenefitsCal Not available Monday 4/24 at 5:00 AM until Monday 4/24 7:30 AM to customers and CBOs (maintenance mode)	
CalSAWS Production		  CalSAWS Production and Self Service in IVR not available beginning Friday 4/21 at 3:30 PM until Monday 4/24 at 7:30 AM. Contact Center available (limited) beginning Friday 4/21 at 3:30 PM until Monday at 7:30 AM. Imaging is view/read only.			
CalSAWS: LMS, PRT, Sandbox, Training		NO changes to system downtimes for CalSAWS PRT and LMS for CalSAWS County Staff			

4/24 by 7:30
AM Production
Available



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
 - Address Change Flow & Messaging from Worker to Customer (Action Item)
-

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

County Users

User Access

- ✓ Access environment with an access code, shared via email to active CBO Managers

- ✓ Access environment with an access code. and shared through Training Committee

- ✓ Pre-approved CBO accounts created for ease of access and shared via email

- ✓ Users follow self-served account creation steps to create test accounts

Features/ Data

- ✓ Includes production features for CBO functionality (excluding chat)

- ✓ Includes production feature set (excluding chat)

- ✓ Data refresh follows existing training refresh schedule (i.e., quarterly)

- ✓ Data refresh follows existing training refresh schedule (i.e., quarterly)

Support

- ✓ Report technical issues through AskCalSAWS channel

- ✓ Report technical issues through existing BenefitsCal and CalSAWS support channels

- ✓ Pre-release updates will be shared through bi-monthly trainings, Quick Reference Guide or YouTube

- ✓ Pre-release updates will be shared through bi-monthly trainings, Quick Reference Guides or YouTube

Target

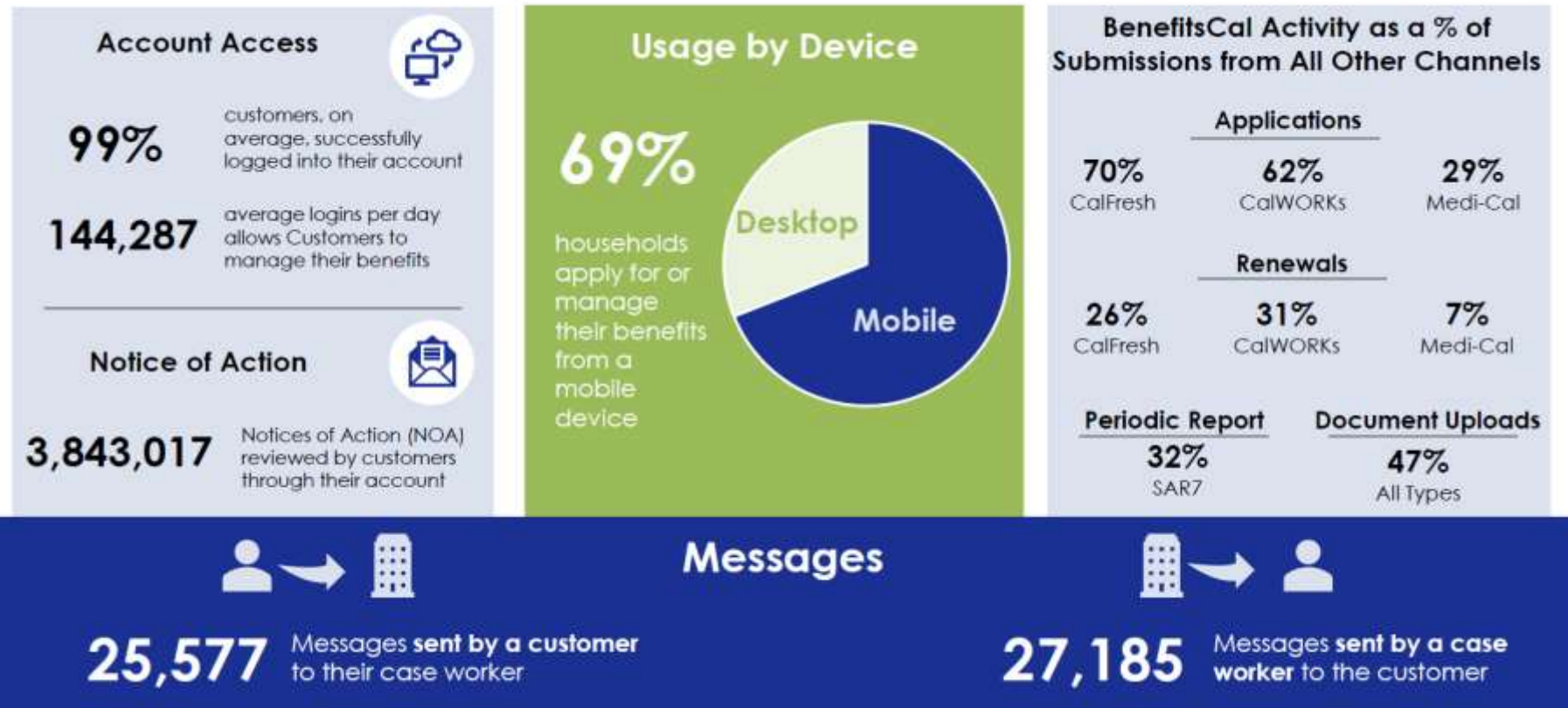
- ✓ May 2023

- ✓ May 2023

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

FINDINGS AND HOW IT'S BEING ADDRESSED?



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

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.

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



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

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



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

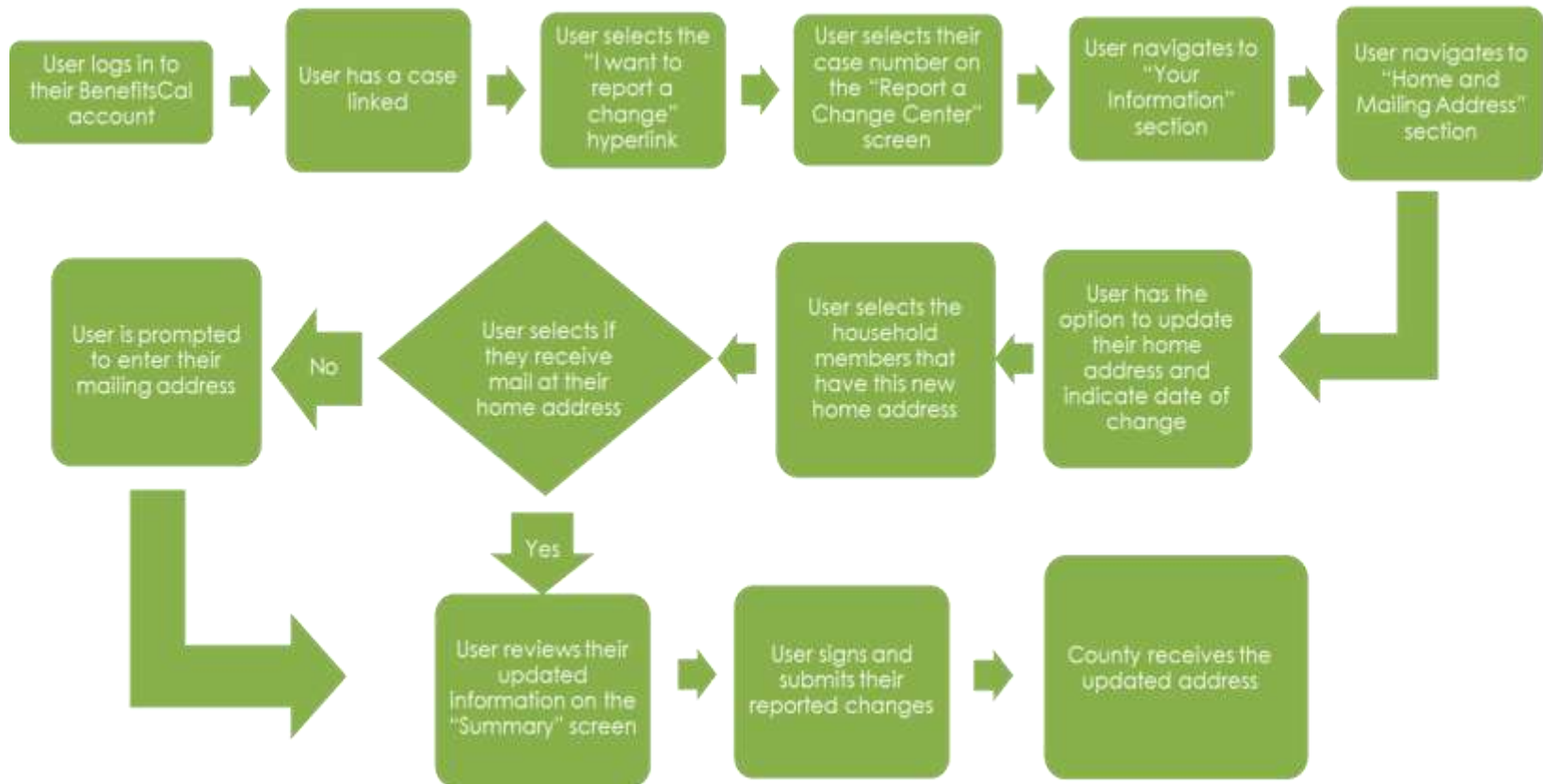
Improve system feedback with a **display message** to enhance usability starting in April.



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

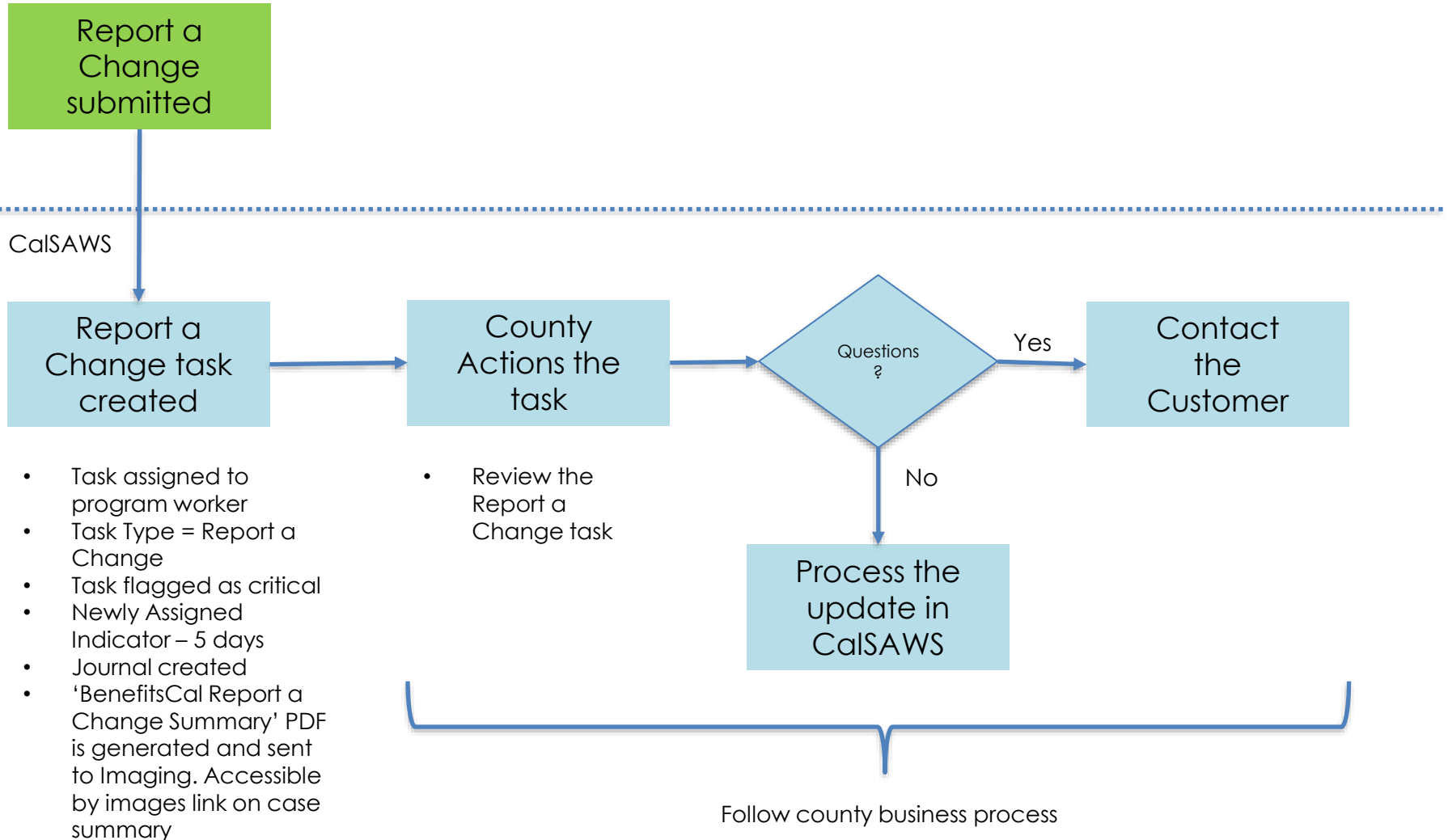
Improve system feedback with a **tool-tip** and **screen modification** to enhance usability starting in May.

Address Change Process Flow by Customer



Address Change Process Flow by Customer

BenefitsCal





Release and Policy Update/Communications

- Continuous Coverage Unwinding
 - Medi-Cal Texting
 - CalSAWS Releases
 - BenefitsCal
-

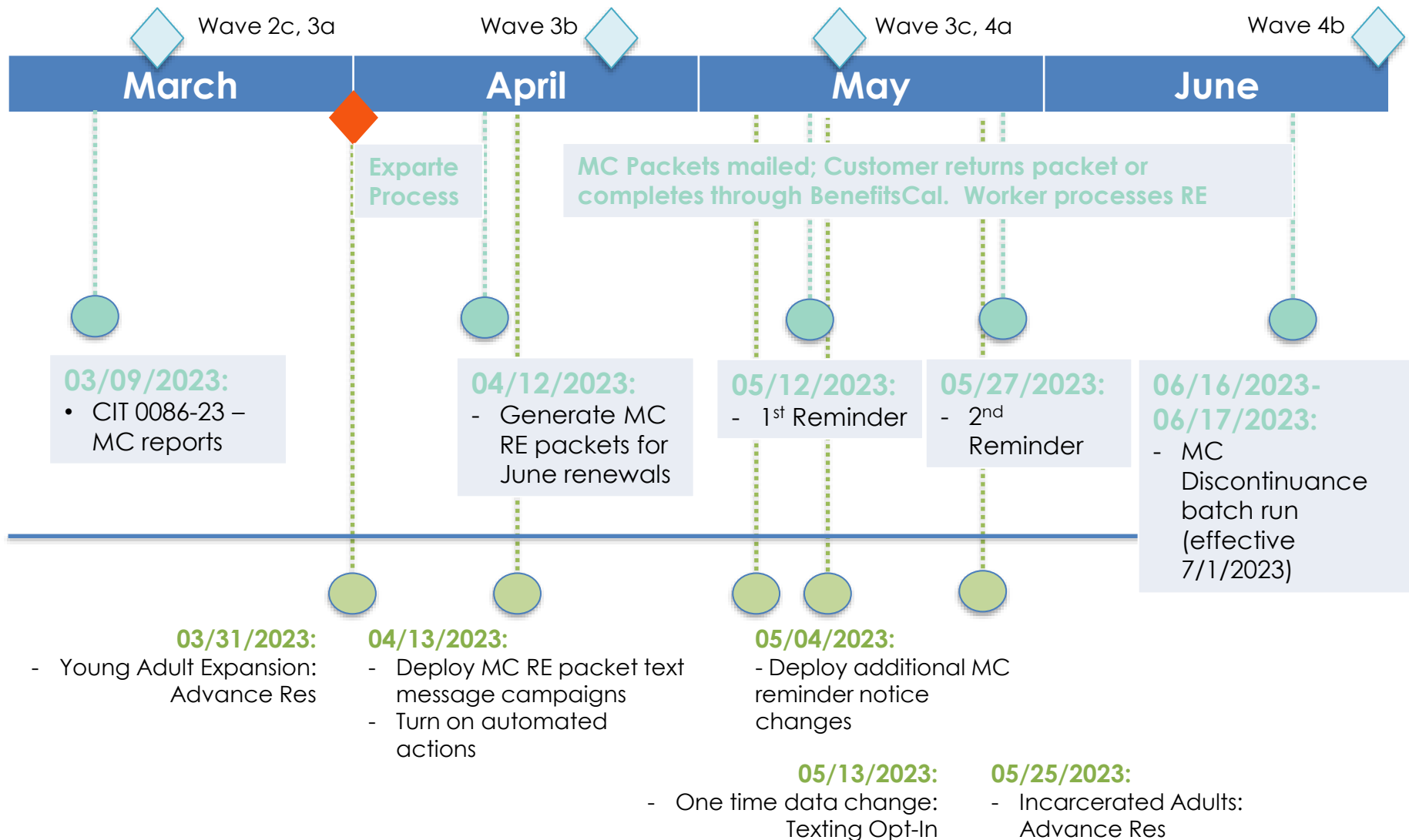
CalSAWS Release and Policy Update

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 ([MEDIL 123-19](#))
 - 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 [outreach toolkit](#) 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: Key features include
 - Opt-In:
 - ✦ Currently, customers must opt-in their phone number and complete a verification process to start receiving text messages. With the FCC clarification on prior express consent, the forementioned process will be revised in the short term and long term
 - ✦ The opt-in status is associated to the person and phone number
 - ✦ All phone numbers have a type e.g. “Cell”, “Home”, “Main”
 - Opt-Out:
 - ✦ A customer can elect to opt-out of CalSAWS text messaging at any time via sending “STOP”, “END”, “QUIT”, updating their selection on BenefitsCal, or contacting the county
 - ✦ Undeliverable messages also result in an Opt-out
 - ✦ Journals are created when the text message status changes

CalSAWS Release and Policy Update

Continuous Coverage Unwinding – FCC Clarification

- CalSAWS Texting Solution: Key features include
 - Text message campaigns:
 - ✦ Text message campaigns may apply to only one program, a subset of programs or all programs
 - ✦ Text message campaigns are initiated via automated actions. An Automated Action is a county configurable mechanism for CalSAWS to trigger the creation of a task or execution of an action (e.g. text message) when a predefined trigger event occurs
 - ✦ Requests for new text campaigns may require new automated actions
 - ✦ All text messages sent to customers are recorded on the Customer Contact History page
 - ✦ All CalSAWS text messages start with the phrase “CalSAWS”. This is required

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

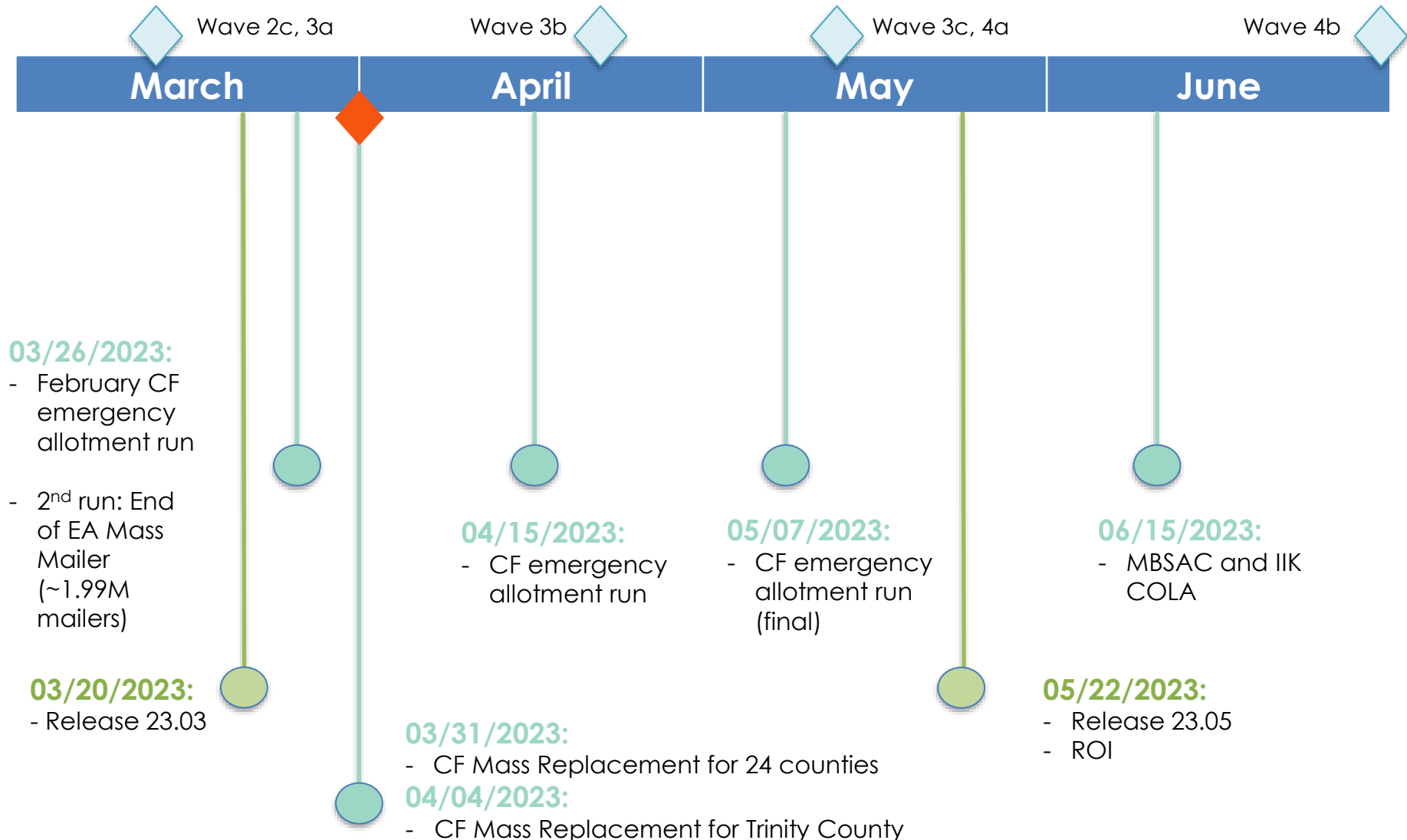
Continuous Coverage Unwinding – FCC Clarification

■ CalSAWS Texting Solution

- CA-256904: Opt-In data change for existing customers
 - For any phone number listed as type “Cell”, “Home” or “Main”, a one-time 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
- 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

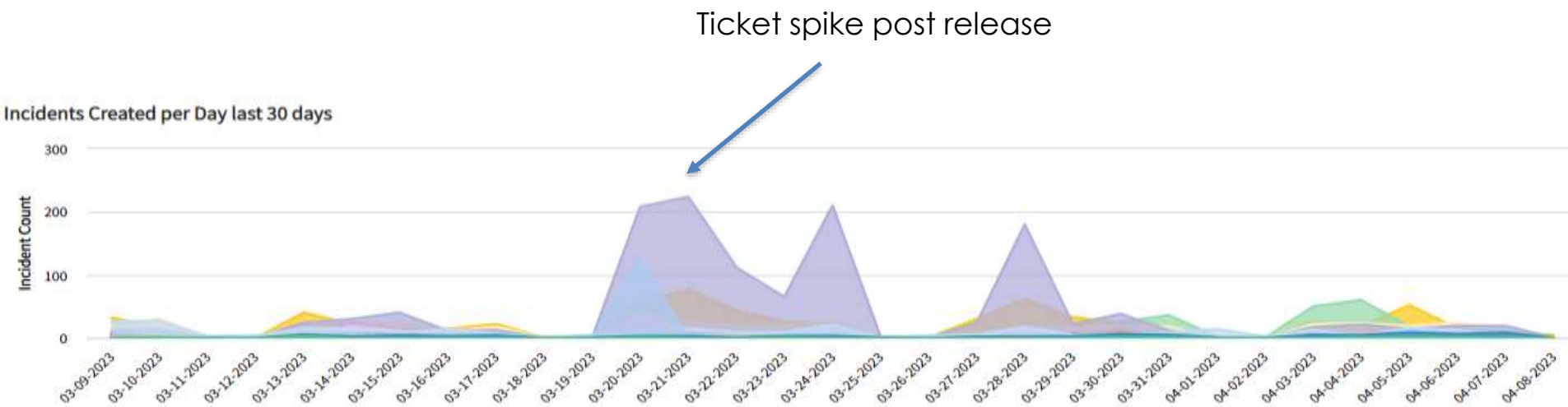


All counties begin renewal activities for the first **Medi-Cal Continuous Coverage Unwinding renewals** on 4/2023 for cases with renewal Due Month 6/2023.

CalSAWS Release and Policy Update

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 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

Spring 2023

★ Quarterly CM Meeting

4/24/23



- CalWIN Wave 3 Go-Live

05/22/23



- Release of Information

More Highlights for March 2023:

Monthly Release deployed to production on 03/30/23 with seven (7) system improvements including:

- ✓ Update School Details page to align with CF37 form.
- ✓ Nudge Customers to verify that their mailing address is still the same
- ✓ Enhance the questions for single member households within the Apply for Benefits section

Summer 2023

★ Quarterly CM Meeting

7/3/23



- CalWIN Wave 4 Go-Live

TBD



- Screenshare

TBD



- CalWORKs Timeclocks

Fall 2023

★ Quarterly CM Meeting

9/4/23



- CalWIN Wave 5 Go-Live

10/30/23



- CalWIN Wave 6 Go-Live

★ Quarterly Collaboration Model (CM) Meeting



Technical Operations Update

- Production Outage Calendar
-

CalSAWS Quality, Defect, Stability, Tickets Stats

March 2023 Major Production Highlights

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27	28	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
	9:25am to 10am CalSAWS Emergency maintenance for DB slowness	Delay in Client Correspondences for San Bernardino				
26	27	28	29	30	31	1

- Red denotes full System wide outage
- Amber denotes System degradation or component outage
- Green denotes System Available

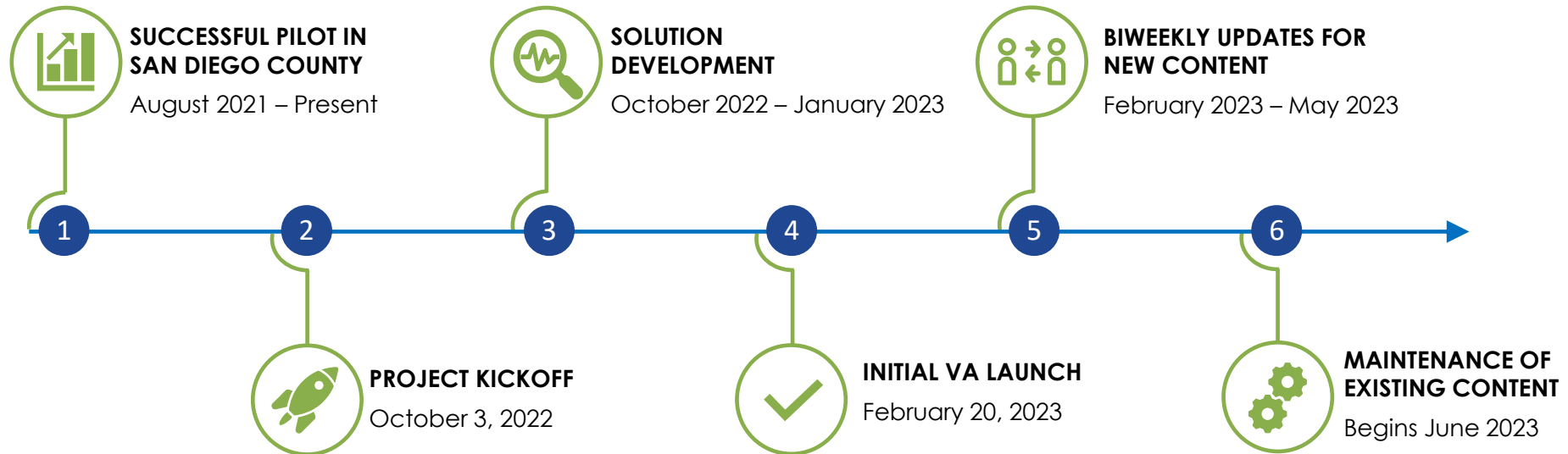


Virtual Assistant Update

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

15,762

TOTAL CONVERSATIONS

Total unique user sessions with VA

64,176

TOTAL MESSAGES

Total messages sent to the VA

108

TOTAL USE CASES

Total pre-defined questions and answers deployed as of 4/13

4.1

AVG MESSAGES PER CONVERSATION

Average number of back-and-forth in a single conversation

85.8%

RESPONSE RATE

Percent of messages that the VA has a response for



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.

A thin vertical grey line is positioned on the left side of the slide. At the bottom of this line is a solid green circle.

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

QA Technical Reviews			
21 CalSAWS SLAs Reviewed	3 Hyland SLAs In Review	1 County-wide System Impacts	23 CC/Model Office Test Scripts Reviewed

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

Functional/Test Highlights

23.03 CalSAWS Complete

23.05 CalSAWS Started

23.05 BenefitsCal Started

Technical Highlights

System Performance

Contact Center(CC) and Imaging QA

County-wide System Impacts

Migration Highlights

Requirements and Conversion Defects

Migration County Onsite/Virtual Support

Lessons Learned & Retrospectives



Update on Key State IV&V Activities

Wave 3 Go-Live Readiness: IV&V Observations

Highlights

Overall Readiness Confirmation Status:



Application



Monitoring:

- Image migration from CalWIN to CalSAWS

Concerns:

- None

Risks:

- None



Conversion



Monitoring:

- Testing progress on the open Conversion defects targeted for completion before Go-Live.

Concerns:

- None

Risks:

- 280: Unresolved Go-Live Dependent defects



Test



Monitoring:

- None

Concerns:

- None

Risks:

- None



Organizational



Monitoring:

- None

Concerns:

- None

Risks:

- None



Training



Monitoring:

- Progress on WBTs for Wave 3 Counties

Concerns:

- None

Risks:

- None



Implementation



Monitoring:

- Progress on County Prep Activities and 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



State Partners Updates

- OSI
 - CDSS
 - DHCS
-



Regional Updates



Adjourn Meeting
