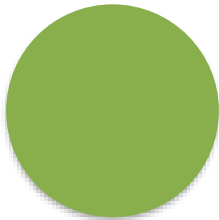




CalSAWS | JPA Board of Directors Meeting



May 12, 2023

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# Agenda

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

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

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



# Action Items

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# Action Items

4. Approval of the CDSS and CalSAWS Data Use Agreement.
5. Approval of the CSAC Contract for the period of July 1, 2023 to June 30, 2028.

# Action Items

## 6. Approval of Consent Items

- a. Approval of the Minutes and review of the Action Items from the April 14, 2023, JPA Board of Directors Meeting.
- b. Approval of Delegated Authority to the CalSAWS Executive Director for AWS through CDT Contract.
- c. Approval of Gainwell Change Request No. 8, which includes request to add County Directs.



# Informational Items

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## Release and Policy Update

- Continuous Coverage Unwinding
  - Texting Reports (Action Item)
  - BenefitsCal - ROI
- 
-

# CalSAWS Release and Policy Update

## Continuous Coverage Unwinding – DHCS Updates

### ■ Data Reporting

- DHCS Unwinding Eligibility Dashboard: To be posted monthly by statewide and county-level data with the following data:
  - ✦ Total Medi-Cal Enrollment
  - ✦ Applications
  - ✦ Redeterminations
  - ✦ Discontinuances
- The dashboard will be posted on the DHCS website on the [Medi-Cal Eligibility Statistics](#) page
- DHCS expects to release the first dashboard at the end of May or beginning of June

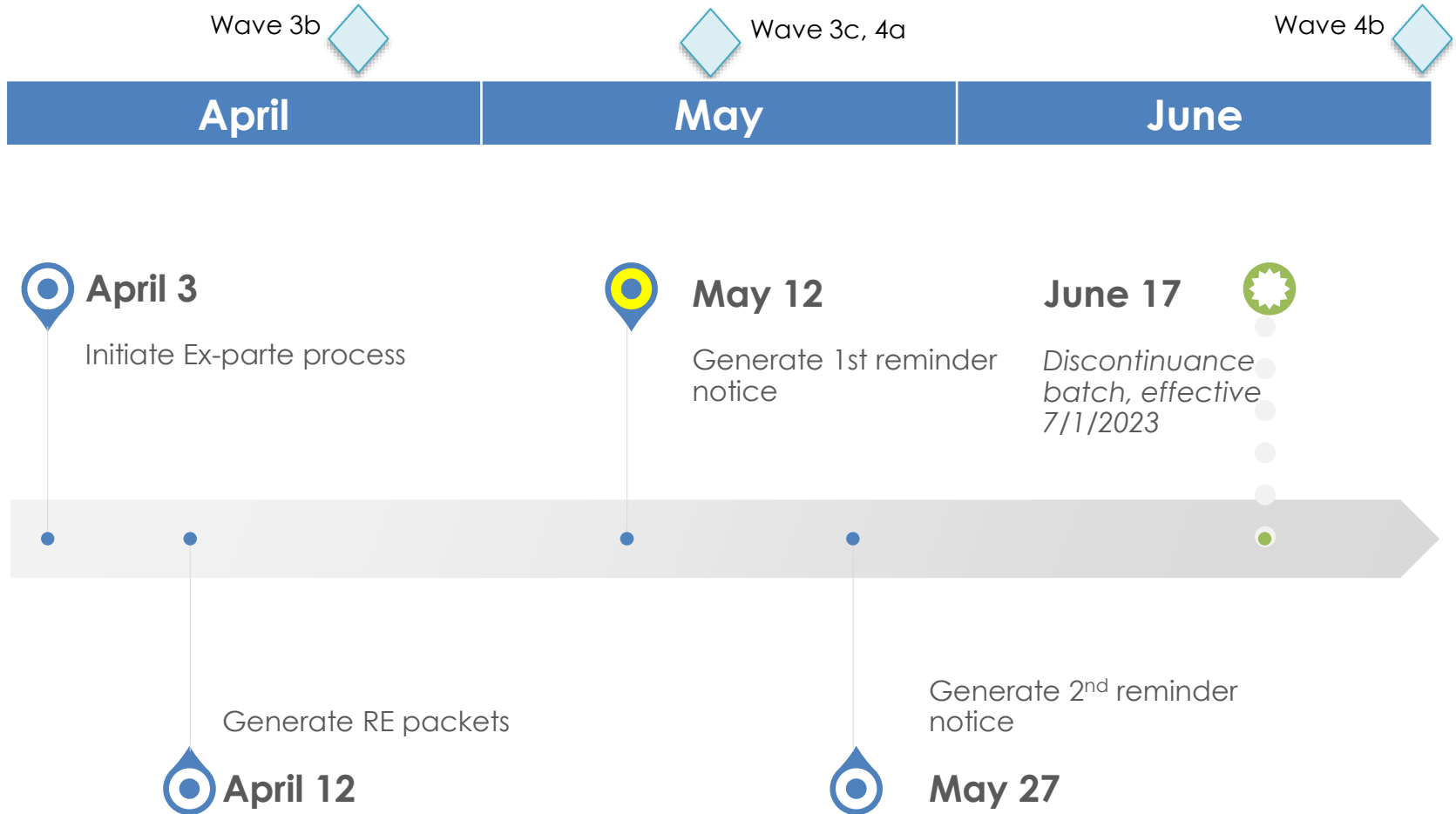
# CalSAWS Release and Policy Update

## Continuous Coverage Unwinding – DHCS Updates

- Outreach Campaign Updates:
  - DHCS has made enhancements to the [KeepMediCalCoverage.org](https://www.KeepMediCalCoverage.org). The layout has been redesigned on the landing for Medi-Cal members to easily access the information they need such as:
    - ✦ Update my Information
    - ✦ I got a renewal form
    - ✦ I'm no longer covered
    - ✦ I was renewed
  - Beginning the week of May 1, 2023, DHCS began emailing and texting all Medi-Cal members who have opted into receiving emails and/or texts.
  - GMMB is assisting with developing messaging and outreach for the Non-MAGI population regarding the Asset Waiver which does not require Medi-Cal members to turn in non-income producing assets during the renewal.

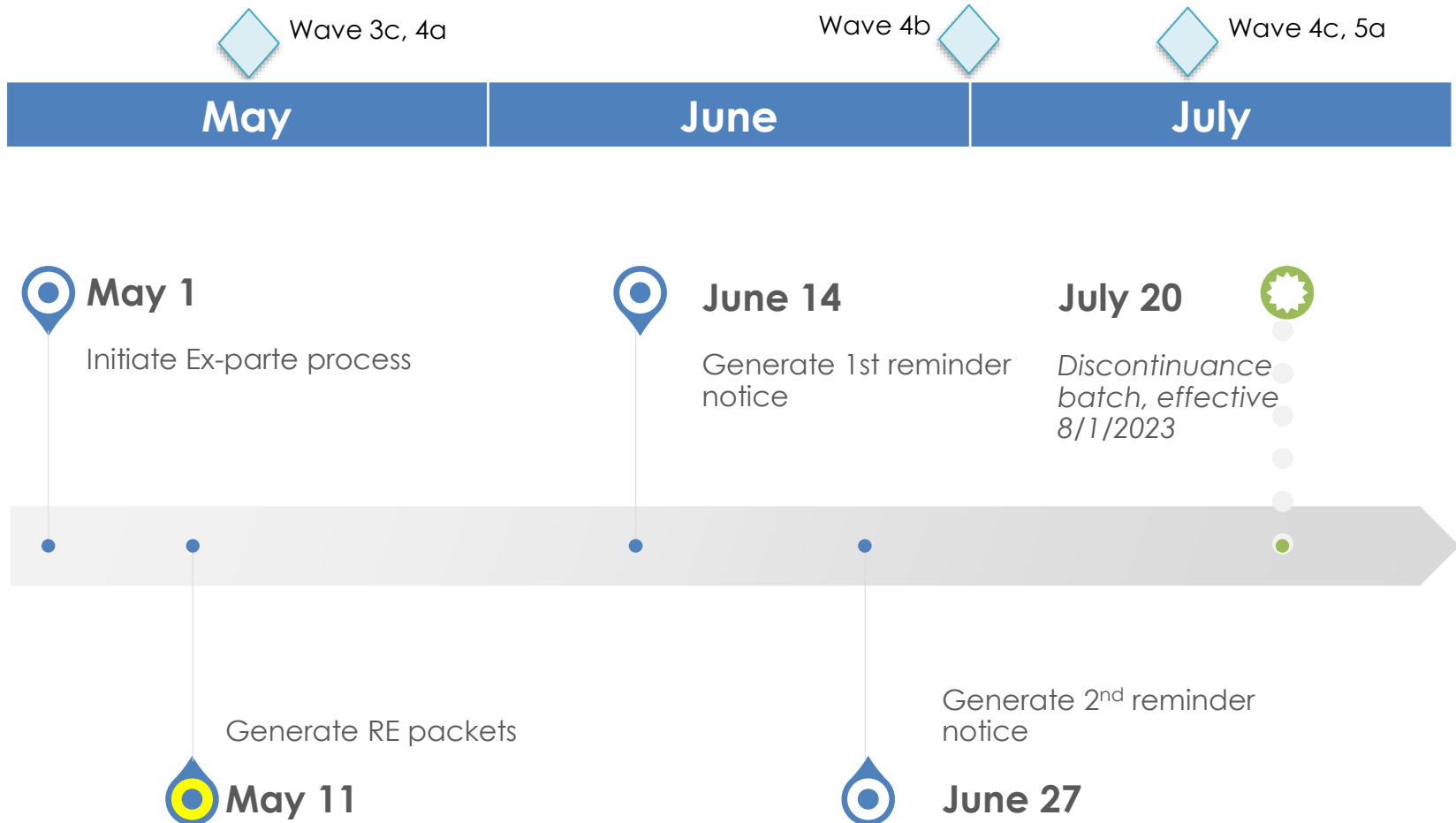
# CalSAWS Release and Policy Update

## Continuous Coverage Unwinding – June Renewals



# CalSAWS Release and Policy Update

## Continuous Coverage Unwinding – July Renewals



# CalSAWS Release and Policy Update

## Continuous Coverage Unwinding

- Communications - Distributed:
  - CIT 0086-23: MC Reports
  - Fact sheet: Medi-Cal Renewals – Key Dates
  - Fact sheet: Medi-Cal Renewals – Discontinuances
  - CIT 0173-23: Text Messaging Customer Opt-in
  
- Communications – In Process:
  - Fact sheet: Text messaging. This will include information on texting campaigns and texting reports
    - ✦ Monthly ad-hoc – update to include opt-out counts
    - ✦ Text Notification Report – monthly, scheduled report
  - Worker Facing Virtual Assistant (VA):
    - ✦ Collaboration with DHCS to identify the most frequently asked questions (from the counties) to the VA



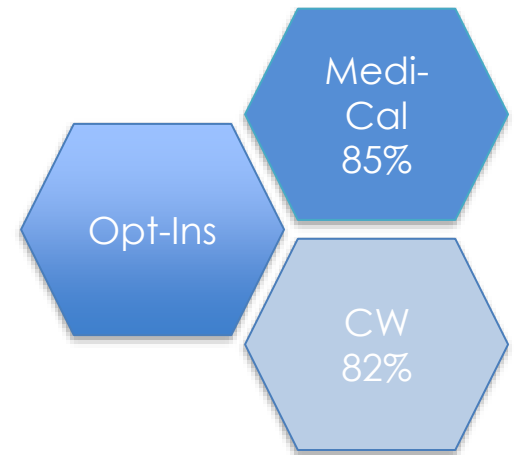
# CalSAWS Release and Policy Update

## Continuous Coverage Unwinding – Text Messaging

- CA-259996: Opt-In data change for existing customers – executed on May 7, 2023



- Opt-in pending and active primary applicants on **Medi-Cal and CalWORKS**. Since opt in is **at person-phone number level**, applicant will be opted in for other active and pending programs as well
- For any phone number listed as type “Cell”, “Main” or “Home”, 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
- Add a journal to each case where the data change is executed



\* Percentage of pending and active primary applicants who are opted-in text messaging.

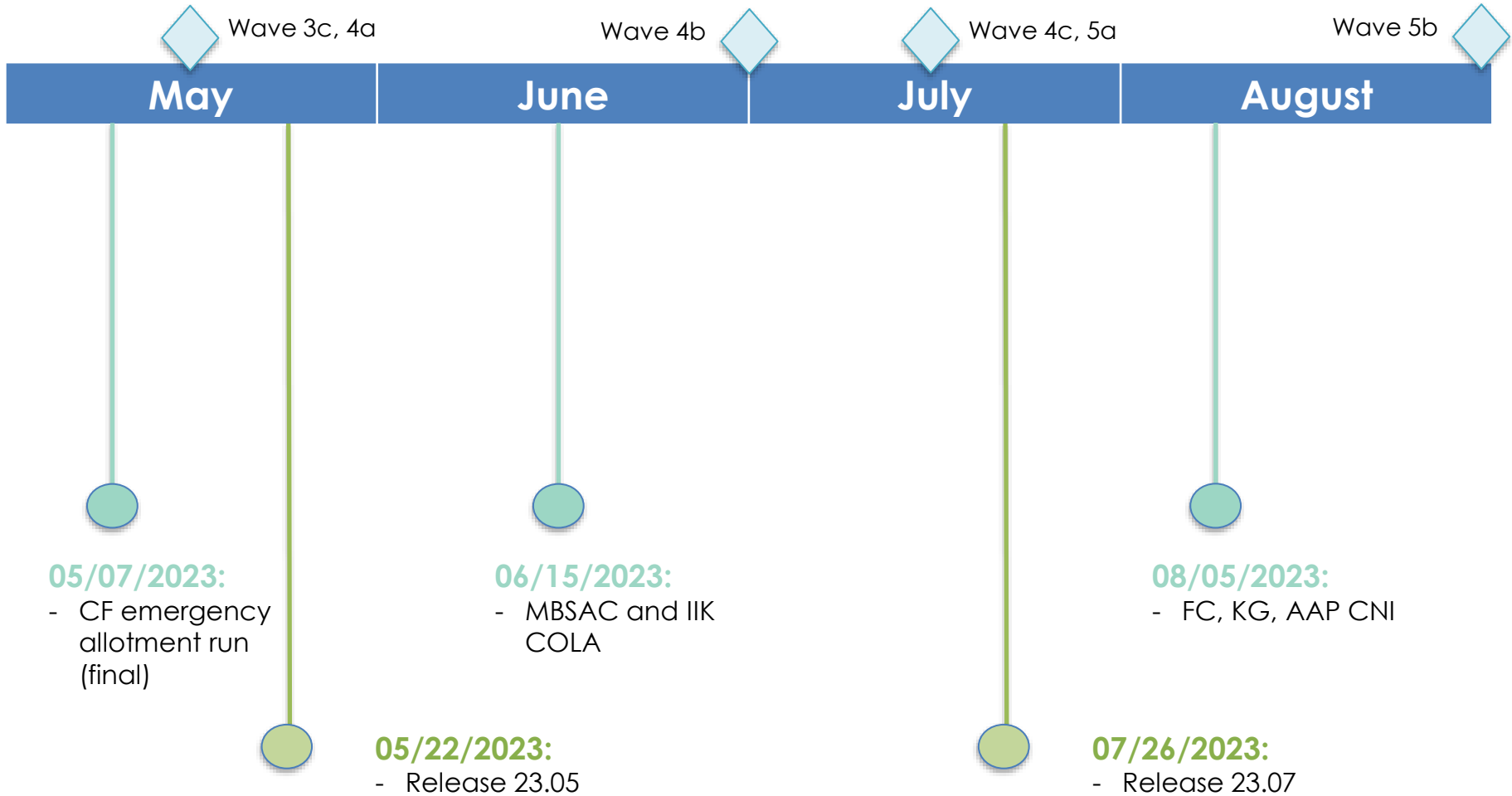
# CalSAWS Release and Policy Update

## Continuous Coverage Unwinding – Text Messaging

- CalSAWS Texting Solution – upcoming changes
  - An opt-in data change will also run for each county in waves 4-6, approximately two weeks after cutover
  - CA-256904: Opt-In online page changes for new customers, new phone numbers
    - ✦ Updates to New Person Detail and Contact Detail pages
    - ✦ This change was targeted for end of May. However, timeline is now TBD due to a dependency on CDSS guidance.
  - Additional texting campaigns have been requested and are in analysis

# CalSAWS Release and Policy Update

## CalSAWS Release Highlights



# CalSAWS Release and Policy Update

## CalSAWS Release Highlights - CalFresh

- Disaster CalFresh – Wave 1
  - Impacted Counties: Kern, Mariposa, Monterey, San Benito, Santa Cruz, Tulare, and Tuolumne Counties
  - 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
- Disaster CalFresh – Wave 2
  - Impacted Counties: San Bernardino County
  - Benefit period: February 21, 2023, through March 22, 2023
  - Application Period:
    - ✦ Monday, May 1, 2023, to Friday, May 5, 2023
    - ✦ Monday, May 8, 2023, to Tuesday, May 9, 2023
- Disaster CalFresh – Wave 3
  - Impacted Counties: Madera, Mendocino and Mono
  - Benefit period: February 21, 2023, through March 22, 2023
  - Application Period:
    - ✦ Monday, May 15, 2023, to Friday, May 19, 2023

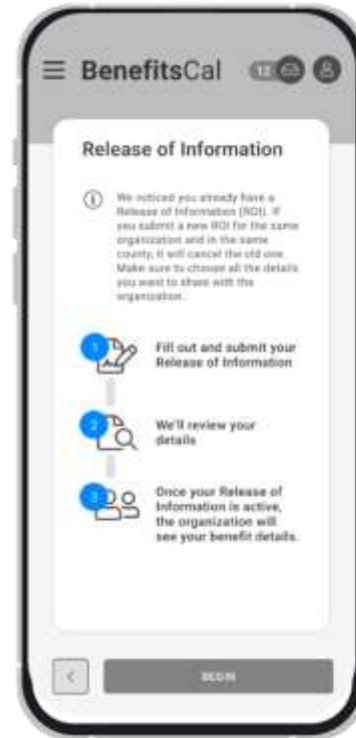
# CalSAWS Release of Information (ROI) Update

- County validation team validated the CalSAWS and BenefitsCal ROI changes
  - ▣ Imperial, Los Angeles, Merced, Riverside, and San Bernardino participated in County Validation
  - ▣ Validated 50 scenarios
  - ▣ Completed on 5/9/2023
- CalSAWS/BenefitsCal System teams tested and passed a combined 1,000 test scenarios
- ROI Outreach:
  - ▣ All-County ROI functionality demonstration was held on May 4<sup>th</sup>
  - ▣ Draft CalSAWS ROI job aid was published via CIT 23-01 10. The final will be available on CalSAWS Online help on May 22<sup>nd</sup>
  - ▣ CalSAWS functional presentation (CFP) will be available in the LMS on May 22<sup>nd</sup>

# Release and Policy Update

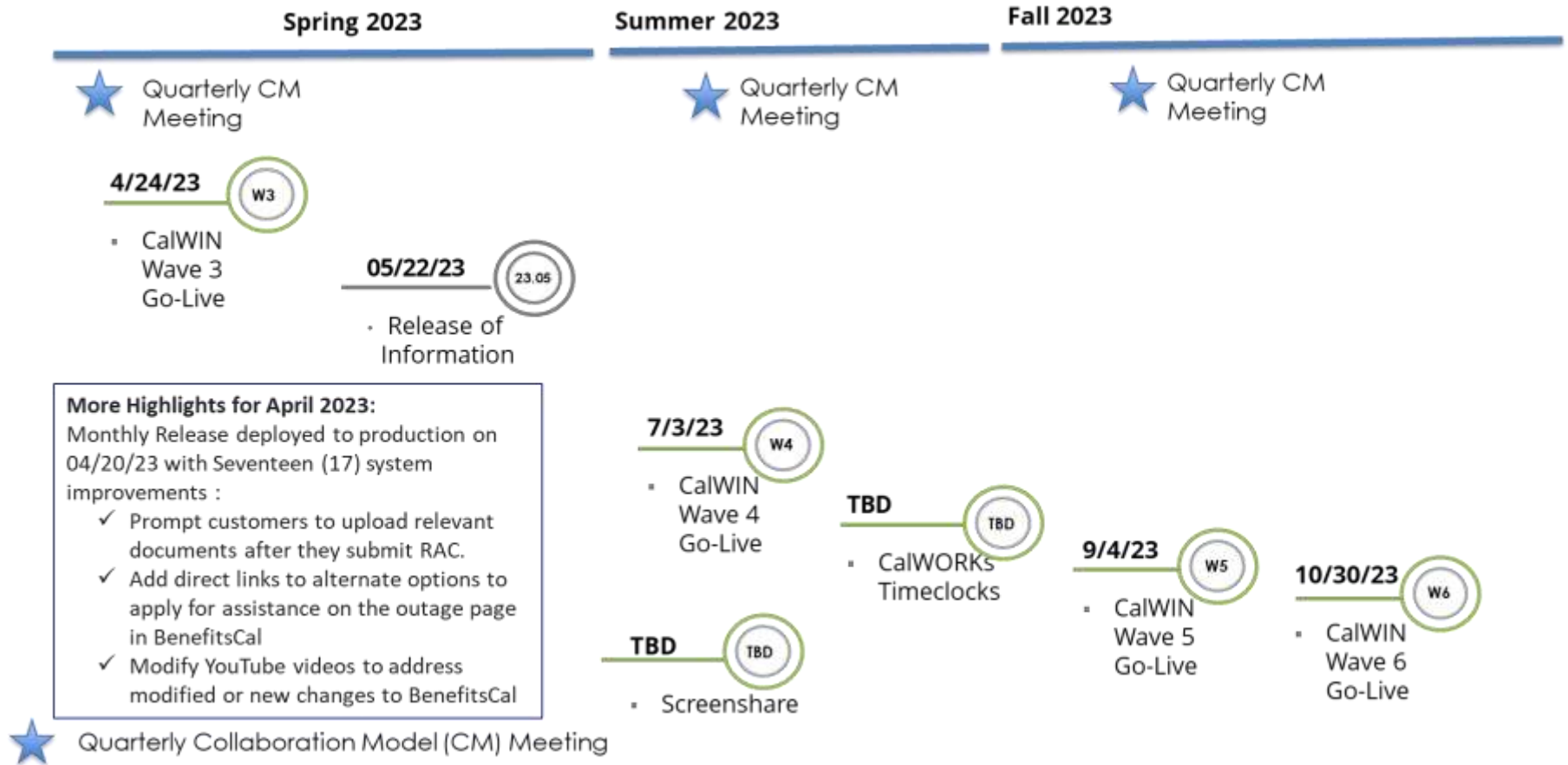
## Release of Information (ROI)

- Release of Information allows customers to release a specific set of information for a defined time period to Community Based Organizations to better assist them
- Designed and developed based on the draft ACL provided by the State
- County Validation, Advocate and State Partner validation is complete
- Target production deployment date is 05/22/23 for pilot use by State-Contracted CBOs



# BenefitsCal

## Upcoming Release Calendar





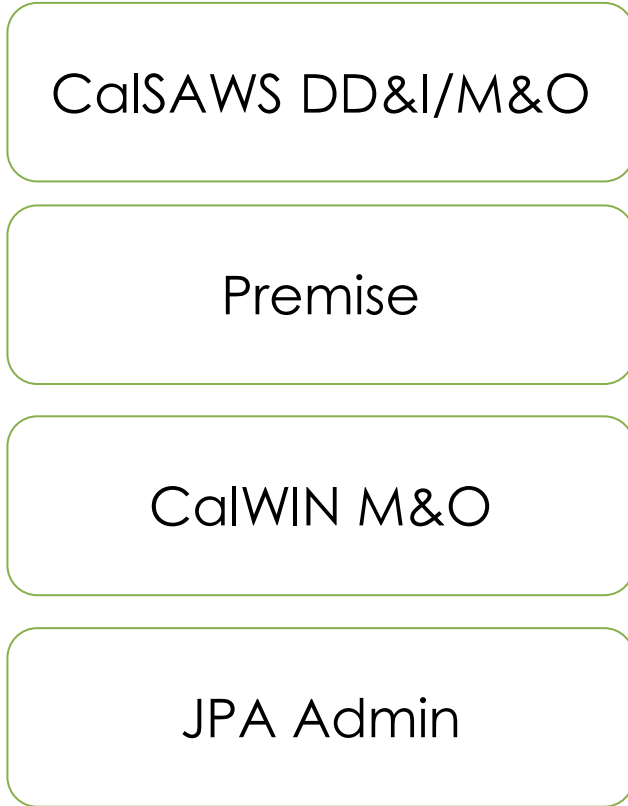
# Quarterly Fiscal Update



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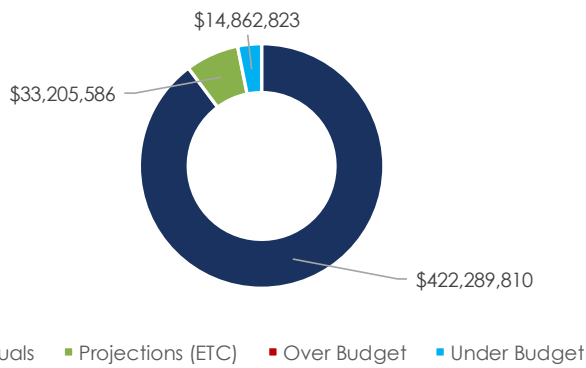
# CalSAWS Financial Update

## Overview

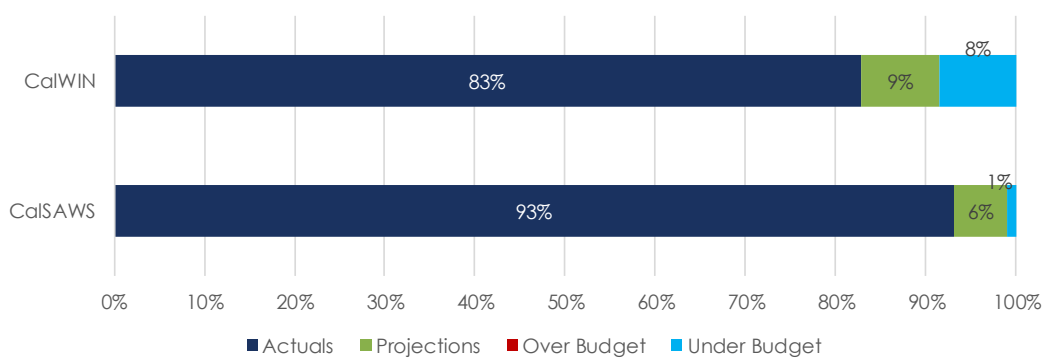


- 1 Actuals to Date  
**Based on Vendor Invoices & County Claims**
- 2 Projections (Estimates to Complete)  
**Estimated Costs for Future Months**
- 3 Estimate at Completion (EAC)  
**Actual Costs Plus Estimated**
- 4 Total Allocation/Budget  
**Amount Allocated by Line Item for the Approved Budget**
- 5 Balance  
**Difference Between EAC and Budget**  
**Negative balance is over budget**  
**Positive balance is under budget**
- 6 % Expended to Date (Actuals)  
**Percent of Actuals to Date Divided by the Budget**
- 7 % EAC to Budget  
**Percent of EAC Divided by the Budget**

Total Actuals & Projections



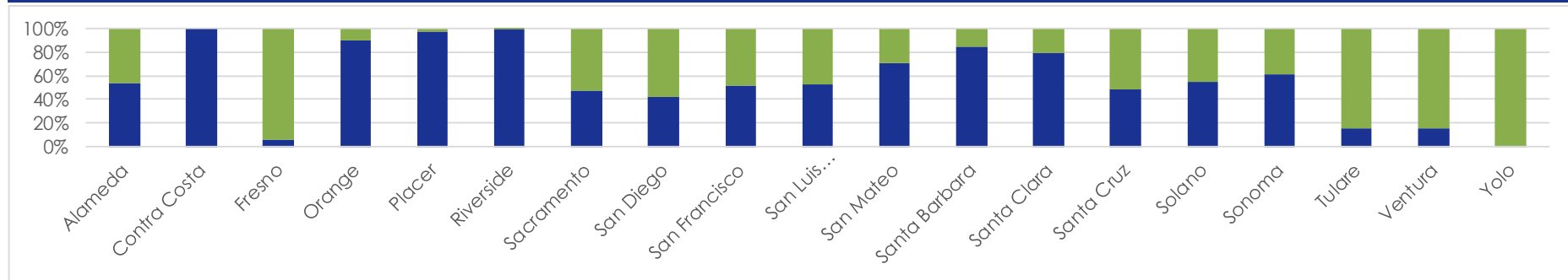
% Expended to Date



Category	Actuals to Date <sup>1</sup>	Projections (ETC)	EAC	Total Allocation (Budget)	Balance + Under / (-Over)	% Expended to Date	% EAC to Budget	Notes
<b>CalSAWS</b>	<b>\$317,814,170</b>	<b>\$19,963,430</b>	<b>\$337,777,600</b>	<b>\$341,201,390</b>	<b>\$3,423,790</b>	<b>93.1%</b>	<b>99.0%</b>	
DD&I App. Dev.	\$1,904,168	\$0	\$1,904,168	\$2,044,435	\$140,267	93.1%	93.1%	Actuals less than planned
DD&I Non-App. Dev.	\$61,886,388	\$11,867,456	\$73,753,844	\$74,765,964	\$1,012,120	82.8%	98.6%	Payment month adjustment
DD&I Training	\$15,050,216	\$452,441	\$15,502,657	\$16,651,084	\$1,148,427	90.4%	93.1%	Travel for ILT less than planned
CalSAWS M&O	\$230,902,299	\$7,643,533	\$238,545,832	\$238,648,885	\$103,053	96.8%	100.0%	
M&O Procurement	\$1,309,149	\$0	\$1,309,149	\$1,611,844	\$302,695	81.2%	81.2%	Staff and legal less than planned
OCAT M&O	\$1,951,838	\$0	\$1,951,838	\$2,112,452	\$160,614	92.4%	92.4%	Staff less than planned
CalHEERS Interface	\$4,513,833	\$0	\$4,513,833	\$4,963,356	\$449,523	90.9%	90.9%	Application changes less than planned
Covered CA CSC	\$296,279	\$0	\$296,279	\$403,370	\$107,091	73.5%	73.5%	Actuals less than planned
<b>CalSAWS Premise</b>	<b>\$20,314,923</b>	<b>\$4,351,136</b>	<b>\$24,666,059</b>	<b>\$27,435,714</b>	<b>\$2,769,655</b>	<b>74.0%</b>	<b>89.9%</b>	
CalSAWS Premise	\$20,314,923	\$4,351,136	\$24,666,059	\$27,435,714	\$2,769,655	74.0%	89.9%	Costs less than planned (includes CalWIN)
<b>CalWIN M&amp;O</b>	<b>\$83,648,484</b>	<b>\$8,891,020</b>	<b>\$92,539,504</b>	<b>\$101,066,967</b>	<b>\$8,527,463</b>	<b>82.8%</b>	<b>91.6%</b>	
CalWIN M&O	\$76,387,639	\$8,891,020	\$85,278,659	\$87,681,776	\$2,403,117	87.1%	97.3%	Application changes less than planned
CalHEERS Interface	\$5,891,024	\$0	\$5,891,024	\$11,546,970	\$5,655,946	51.0%	51.0%	Application changes less than planned
CalHEERS CSCN	\$1,369,821	\$0	\$1,369,821	\$1,838,221	\$468,400	74.5%	74.5%	Application changes less than planned
<b>JPA Admin. Budget</b>	<b>\$512,233</b>	<b>\$0</b>	<b>\$512,233</b>	<b>\$654,148</b>	<b>\$141,915</b>	<b>78.3%</b>	<b>78.3%</b>	
CalSAWS 58 Counties	\$512,233	\$0	\$512,233	\$654,148	\$141,915	78.3%	78.3%	Fiscal agent costs less than planned
<b>Total</b>	<b>\$422,289,810</b>	<b>\$33,205,586</b>	<b>\$455,495,396</b>	<b>\$470,358,219</b>	<b>\$14,862,823</b>	<b>89.8%</b>	<b>96.8%</b>	

<sup>1</sup>: June Payment Month (partial actuals per advance); March Claim Month

# CalSAWS | SFY 2022/23 DD&I COUNTY SUPPORT STAFF (THROUGH March 2023)



COMBINED TOTAL	\$ 14.4 M Actuals to Date	\$ 10.9 M Projections	\$ 25.3 M Estimate At Completion	\$ 25.3 M Total Allocation	\$ .0 M Balance (+Under/-Over)	57% % Expended to Date	100% % EAC to Budget
Alameda	\$1,011,590	\$879,617	\$1,891,207	\$1,891,207	\$0	53%	100%
Contra Costa	\$823,835	\$0	\$823,835	\$823,835	\$0	100%	100%
Fresno	\$118,310	\$1,925,300	\$2,043,610	\$2,043,610	\$0	6%	100%
Orange	\$3,847,663	\$440,400	\$4,288,063	\$4,288,063	\$0	90%	100%
Placer	\$170,721	\$3,684	\$174,405	\$174,405	\$0	98%	100%
Riverside	\$999,999	\$1,734	\$1,001,733	\$1,001,733	\$0	100%	100%
Sacramento	\$815,513	\$899,838	\$1,715,351	\$1,715,351	\$0	48%	100%
San Diego	\$1,622,807	\$2,255,742	\$3,878,549	\$3,878,549	\$0	42%	100%
San Francisco	\$597,975	\$550,753	\$1,148,728	\$1,148,728	\$0	52%	100%
San Luis Obispo	\$170,425	\$155,503	\$325,928	\$325,928	\$0	52%	100%
San Mateo	\$648,725	\$266,905	\$915,630	\$915,630	\$0	71%	100%
Santa Barbara	\$700,389	\$131,100	\$831,489	\$831,489	\$0	84%	100%
Santa Clara	\$1,656,450	\$419,949	\$2,076,399	\$2,076,399	\$0	80%	100%
Santa Cruz	\$219,462	\$233,672	\$453,134	\$453,134	\$0	48%	100%
Solano	\$408,071	\$337,552	\$745,623	\$745,623	\$0	55%	100%
Sonoma	\$245,772	\$158,067	\$403,839	\$403,839	\$0	61%	100%
Tulare	\$183,146	\$975,592	\$1,158,738	\$1,158,738	\$0	16%	100%
Ventura	\$187,659	\$1,059,516	\$1,247,175	\$1,247,175	\$0	15%	100%
Yolo	\$0	\$211,001	\$211,001	\$211,001	\$0	0%	100%

Note: Riverside allocation based on response to CRFI request to shift funds to SFY 22/23 after the post go live period.

# CalSAWS | SFY 2022/23 CONSORTIUM PERSONNEL BUDGET & FTEs

CATEGORY	Actuals to Date	Projections (ETC)	EAC	Total Allocation (Budget)	BALANCE +Under / (-Over)	% Expended to Date	% EAC to Budget	Notes
<b>CalSAWS</b>	<b>\$26,909,524</b>	<b>\$3,886,359</b>	<b>\$30,795,883</b>	<b>\$31,336,544</b>	<b>\$540,661</b>	<b>85.9%</b>	<b>98.3%</b>	
Consortium Personnel - County <sup>1</sup>	\$9,901,942	\$3,438,649	\$13,340,591	\$13,536,484	\$195,893	73.2%	98.6%	Costs less than planned
Consortium Personnel - Contractor <sup>2,3</sup>	\$17,007,582	\$447,710	\$17,455,292	\$17,800,060	\$344,768	95.5%	98.1%	Costs less than planned
<b>CalWIN M&amp;O</b>	<b>\$2,852,491</b>	<b>\$73,963</b>	<b>\$2,926,454</b>	<b>\$4,010,269</b>	<b>\$1,083,815</b>	<b>71.1%</b>	<b>73.0%</b>	
Consortium Personnel - County <sup>1</sup>	\$92,105	\$73,963	\$166,068	\$166,068	\$0	55.5%	100.0%	
Consortium Personnel - Contractor <sup>2,3</sup>	\$2,760,386	\$0	\$2,760,386	\$3,844,201	\$1,083,815	71.8%	71.8%	Costs less than planned
<b>CalSAWS Premise</b>	<b>\$110,808</b>	<b>\$221,803</b>	<b>\$332,611</b>	<b>\$332,611</b>	<b>\$0</b>	<b>33.3%</b>	<b>100.0%</b>	
Consortium Personnel - County	\$110,808	\$221,803	\$332,611	\$332,611	\$0	33.3%	100.0%	
Consortium Personnel - Contractor <sup>2</sup>	\$0	\$0	\$0	\$0	\$0	0.0%	0.0%	
<b>Total</b>	<b>\$29,872,823</b>	<b>\$4,182,125</b>	<b>\$34,054,948</b>	<b>\$35,679,424</b>	<b>\$1,624,476</b>	<b>83.7%</b>	<b>95.4%</b>	

SFY 2022/23 - Consortium Personnel FTE Counts	FTE
<b>CalSAWS DD&amp;I and M&amp;O</b>	<b>185</b>
Consortium Personnel - County <sup>1</sup>	78
Consortium Personnel - Contractor <sup>2</sup>	86
Consortium Personnel - Contractor Limited Term <sup>3</sup>	20
TBD <sup>4</sup>	1
<b>CalWIN M&amp;O</b>	<b>17</b>
Consortium Personnel - County <sup>1</sup>	1
Consortium Personnel - Contractor <sup>2</sup>	7
Consortium Personnel - Contractor Limited Term <sup>3</sup>	6
TBD <sup>4</sup>	3
<b>Premise</b>	<b>1</b>
Consortium Personnel - County <sup>1</sup>	1
Consortium Personnel - Contractor <sup>2</sup>	0
<b>Total</b>	<b>203</b>

<sup>1</sup>Includes only Consortium Staff, does not include County Support Staff  
<sup>2</sup>Includes RGS and CSAC employees  
<sup>3</sup>Includes RGS, CSAC, and First Data Staff (Non-Employees)  
<sup>4</sup>Does not account for backfill considerations

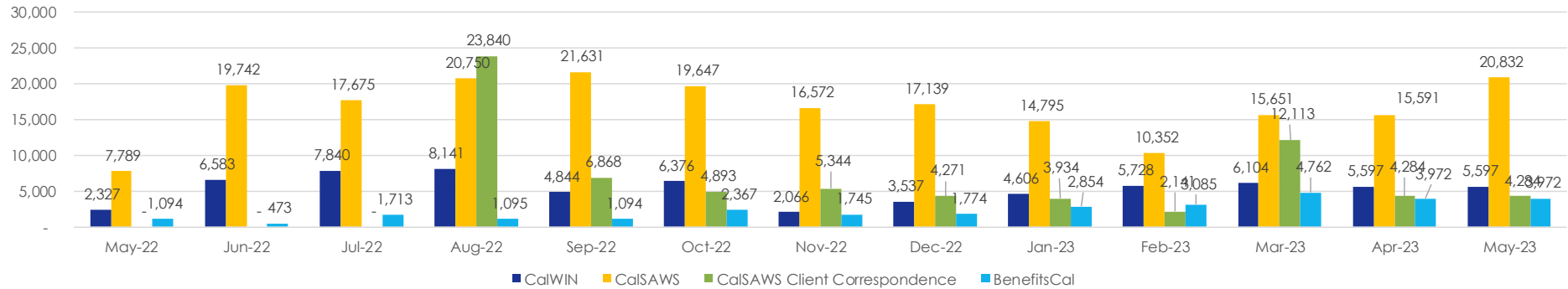
# CalSAWS | SFY 2022/23 CHANGE BUDGET (APPLICATION MAINTENANCE / M&E HOURS)

Change Budget Category	Actuals to Date	Projections (ETC)	EAC	Total Allocation (Budget)	BALANCE +Under / (-Over)	% Expended to Date	% EAC to Budget
<b>CalWIN M&amp;O</b>	<b>\$11,628,128</b>	<b>\$0</b>	<b>\$11,628,128</b>	<b>\$22,194,532</b>	<b>\$10,566,404</b>	<b>52.4%</b>	<b>52.4%</b>
CalWIN M&O	\$9,773,703	\$0	\$9,773,703	\$13,676,424	\$3,902,721	71.5%	71.5%
CalHEERS Interface Change Budget	\$1,128,421	\$0	\$1,128,421	\$6,513,516	\$5,385,095	17.3%	17.3%
CalHEERS CSCN Change Budget	\$0	\$0	\$0	\$249,592	\$249,592	0.0%	0.0%
CalWIN Premise	\$726,004	\$0	\$726,004	\$1,755,000	\$1,028,996	41.4%	41.4%
<b>CalSAWS M&amp;O</b>	<b>\$48,294,085</b>	<b>\$1,118,741</b>	<b>\$49,412,826</b>	<b>\$50,750,585</b>	<b>\$1,337,759</b>	<b>95.2%</b>	<b>97.4%</b>
CalSAWS M&E	\$33,579,529	\$0	\$33,579,529	\$33,579,529	\$0	100.0%	100.0%
CalHEERS Interface Change Budget	\$2,716,521	\$0	\$2,716,521	\$3,166,044	\$449,523	85.8%	85.8%
BenefitsCal	\$3,897,300	\$0	\$3,897,300	\$3,897,300	\$0	100.0%	100.0%
CalSAWS Premise	\$8,100,735	\$1,118,741	\$9,219,476	\$10,107,712	\$888,236	80.1%	91.2%
<b>TOTAL</b>	<b>\$59,922,213</b>	<b>\$1,118,741</b>	<b>\$61,040,954</b>	<b>\$72,945,117</b>	<b>\$11,904,163</b>	<b>82.1%</b>	<b>83.7%</b>

Note: Includes 16,769 hours/month, plus Client Correspondence and contract hours for CalSAWS, plus premise hours. Premise variance due to underspend on ARPA and various CalWIN changes not needed. CalWIN projections assumes use of hours for report refactoring.

# CalSAWS | SFY 2022/23 APPLICATION MAINTENANCE HOURS BY MONTH & SYSTEM

Application Maintenance  
Hours by Service Month



Change Budget Category	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Total
<b>CalWIN M&amp;O</b>	<b>2,327</b>	<b>6,583</b>	<b>7,840</b>	<b>8,141</b>	<b>4,844</b>	<b>6,376</b>	<b>2,066</b>	<b>3,537</b>	<b>4,606</b>	<b>5,728</b>	<b>6,104</b>	<b>5,597</b>	<b>5,597</b>	<b>69,346</b>
Design & Build	1,015	1,479	1,630	3,530	1,460	1,143	322	805	728	1,257	1,032	-	-	14,401
Test	272	2,823	1,924	2,384	1,981	2,630	1,142	970	1,161	1,024	1,015	-	-	17,326
Management & Other Support	1,040	2,281	4,286	2,227	1,403	2,603	602	1,762	2,717	3,447	4,057	-	-	26,425
Projection	-	-	-	-	-	-	-	-	-	-	-	5,597	5,597	11,194
<b>CalSAWS M&amp;O</b>	<b>7,789</b>	<b>19,742</b>	<b>17,675</b>	<b>20,750</b>	<b>21,631</b>	<b>19,647</b>	<b>16,572</b>	<b>17,139</b>	<b>14,795</b>	<b>10,352</b>	<b>15,651</b>	<b>15,591</b>	<b>20,832</b>	<b>218,166</b>
Design & Build	2,316	7,762	8,062	8,581	10,041	7,140	6,940	11,953	5,441	2,423	7,050	-	-	77,709
Test	1,212	2,912	2,053	3,211	3,710	4,083	3,096	3,108	2,948	2,135	2,435	-	-	30,903
Management & Other Support	4,261	9,068	7,560	8,958	7,880	8,424	6,536	2,078	6,406	5,794	6,166	-	-	73,131
Projection	-	-	-	-	-	-	-	-	-	-	-	15,591	20,832	36,423
<b>CalSAWS Client Correspondence</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>23,840</b>	<b>6,868</b>	<b>4,893</b>	<b>5,344</b>	<b>4,271</b>	<b>3,934</b>	<b>2,141</b>	<b>12,113</b>	<b>4,284</b>	<b>4,284</b>	<b>71,972</b>
Client Correspondence	-	-	-	23,840	6,868	4,893	5,344	4,271	3,934	2,141	12,113	-	-	63,404
Projection	-	-	-	-	-	-	-	-	-	-	-	4,284	4,284	8,568
<b>BenefitsCal</b>	<b>1,094</b>	<b>473</b>	<b>1,713</b>	<b>1,095</b>	<b>1,094</b>	<b>2,367</b>	<b>1,745</b>	<b>1,774</b>	<b>2,854</b>	<b>3,085</b>	<b>4,762</b>	<b>3,972</b>	<b>3,972</b>	<b>30,000</b>
Design & Build	598	257	959	603	602	1,301	966	981	1,570	1,699	2,626	-	-	12,162
Test	276	120	436	274	274	592	439	437	714	772	1,194	-	-	5,528
Management & Other Support	220	96	318	218	218	474	340	356	570	614	942	-	-	4,366
Projection	-	-	-	-	-	-	-	-	-	-	-	3,972	3,972	7,944
<b>COMBINED TOTAL</b>		<b>26,798</b>	<b>27,228</b>	<b>29,986</b>	<b>27,569</b>	<b>28,390</b>	<b>20,383</b>	<b>22,450</b>	<b>22,255</b>	<b>19,165</b>	<b>26,517</b>	<b>25,160</b>	<b>30,401</b>	<b>317,512</b>

**NOTES:**  
 Services for May 2022 hours were partially paid in June 2022 and therefore reflected in SFY 21/22 report. Services for May 2023 expected to be partially paid in June 2023.  
 CalSAWS M&E hours updated with Amendment 29 per offshore allowance, Change Notice 24, and Change 25 with shift from CalHEERS.  
 CalSAWS Client Correspondence hours included per Amendment 30 and updated with Change Notice 25.  
 BenefitsCal was approved for an additional 1,250 hours/month as of July 2022 for a total of 2,500/month.  
 Correction applied to December 2022 Hours subsequent to February report.

## Warranty & Liquidated Damages Detail - SFY 2022/23

Category	Contract	Service Month	Amount	Invoice Month	Invoice #
Deliverables produced in Change Request/UAT	CalWIN	March-22	\$5,000	August-22	80004559
System Availability Benefits CalWIN	CalWIN	March-22	\$2,000	August-22	80004559
System Availability CalWIN	CalWIN	March-22	\$5,000	August-22	80004559
System Availability ACCESS CalWIN	CalWIN	April-22	\$22,000	October-22	80005185
Covered CA Interface - Sys Response Time	CalWIN	April-22	\$5,500	October-22	80005185
Covered CA Contact - System Availability	CalWIN	April-22	\$1,000	October-22	80005185
CalSAWS System Daily Peak Usage Hour Availability	CalSAWS	July-22	\$10,000	November-22	1100879471
CalSAWS System Daily Batch Production Jobs Completion	CalSAWS	July-22	\$5,000	November-22	1100879471
CalSAWS System Daily Batch Production Jobs Completion	CalSAWS	August-22	\$5,000	November-22	1100879471
CalSAWS System Daily Peak Usage Hour Availability	CalSAWS	September-22	\$5,000	December-22	1100887405
CalSAWS System Daily Batch Production Jobs Completion	CalSAWS	October-22	\$5,000	January-23	1100893665
System Availability Benefits CalWIN	CalWIN	November-22	\$104,000	March-23	TBD
Deficiency Resolution Timeliness	CalWIN	December-22	\$1,000	March-23	80008559
CalSAWS System Daily Peak Usage Hour EDBC Availability	CalSAWS	December-22	\$2,000	March-23	1100907587
CalSAWS System Daily Batch Production Jobs Completion	CalSAWS	December-22	\$5,000	March-23	1100907587
CalSAWS System Daily Peak Usage Hour Availability	CalSAWS	December-22	\$5,000	March-23	1100907587
<b>Total</b>			<b>\$175,500</b>		

## Hours & Credits

Category	Actuals	Projections (ETC)	EAC	Allowance	BALANCE +Under / (-Over)
CalWIN Modernization ("Modification") Hours	\$9,041,923	\$991,902	\$10,033,825	\$10,033,825	\$0
CalWIN Business Intelligence (BI)	\$3,971,215	\$0	\$3,971,215	\$3,971,215	\$0
CalWIN IDMS	\$1,500,000	\$0	\$1,500,000	\$1,500,000	\$0
CalWIN Business Rules Engine (BRE)	\$3,131,450	\$368,550	\$3,500,000	\$3,500,000	\$0
<b>Total</b>	<b>\$17,644,587</b>	<b>\$1,360,452</b>	<b>\$19,005,039</b>	<b>\$19,005,040</b>	<b>\$0</b>

### Notes:

Modernization Hours are updated each August with 8,500 hours; includes hours for Contract Years 1-7 plus partial Contract Year 8.

Modernation Hours are leveraged for BenefitsCal Technical Help Desk.

IDMS \$1.5M applied to CalSAWS GA/GR.

BRE \$3.5M to be applied to CalSAWS GA/GR.

# CalSAWS | SFY 2022/23 CHANGE NOTICE TRACKING

CalSAWS Contract (Premise/App Maintenance Services)	Total Amount	Change Notice Ref.
<b>Total Baseline Allocation (Amendment 30)</b>	<b>\$92,000,000</b>	
Previously Approved through June 2021	\$21,229,544	FIVE - NINE
Previously Approved June 2021 through October 2021	\$9,182,789	TEN - ELEVEN
Previously Approved Nov 2021 through June 2022	\$11,336,520	TWELVE - EIGHTEEN
Functional Support, Technical Help Desk, Premise, Portal	\$5,519,866	NINETEEN - TWENTY ONE
Various Premise Items	\$2,219,022	TWENTY TWO
Various Premise Items	\$1,995,667	TWENTY THREE
Various Premise Items (Incl ARPA)	\$2,462,894	TWENTY FOUR
Various Enhancements and Premise Item	\$6,131,532	TWENTY FIVE
<b>Total Allocated Amounts</b>	<b>\$60,077,834</b>	
<b>Total Remaining Allocation</b>	<b>\$31,922,166</b>	

CalSAWS Contract (County Purchases)	Total Amount	Change Notice Ref.
<b>Total Baseline Allocation (Amendment 23)</b>	<b>\$20,000,000</b>	
Approved County Purchases	\$1,702,883	FIFTEEN
Approved County Purchases	\$5,112,800	TWENTY
Approved County Purchases	\$552,126	TWENTY TWO
Approved County Purchases	\$886,565	TWENTY FIVE
<b>Total Allocated Amounts</b>	<b>\$8,254,374</b>	
<b>Total Remaining Allocation</b>	<b>\$11,745,626</b>	

Deloitte Portal/Mobile	Total Amount	Work Order Ref.
<b>Total Baseline Allocation (Change Order 5)</b>	<b>\$13,000,000</b>	
Various Premise Items	\$1,112,377	ONE - THREE
American Recovery Plan Act (ARPA)	\$1,705,148	FOUR
American Recovery Plan Act (ARPA) - ROI	\$428,379	FIVE
Get CalFresh (Code for America) - Security Monitoring	\$50,001	SIX
American Recovery Plan Act (ARPA) - SAR 7 and 7A	\$92,496	SEVEN
CW Time Clocks	\$71,000	EIGHT
ARPA - Release of Information (ROI)	\$2,074,391	NINE
ARPA - SAR7/7A UCD Phase 3	\$216,910	TEN
Additional Enhancements	\$92,890	ELEVEN
ARPA - Communication and Marketing campaign (Phase	\$1,472,000	TWELVE
<b>Total Allocated Amounts</b>	<b>\$7,315,592</b>	
<b>Total Remaining Allocation</b>	<b>\$5,684,408</b>	

Deloitte CalWIN ISS (County Purchases)	Total Amount	Work Order Ref.
<b>Total Baseline Allocation (Amendment 2)</b>	<b>\$8,000,000</b>	
San Francisco County Work Order	\$615,250	ONE
<b>Total Allocated Amounts</b>	<b>\$615,250</b>	
<b>Total Remaining Allocation</b>	<b>\$7,384,750</b>	

CalWIN Contract (Premise/App Maint. Services)	Total Amount	Change Order Ref.
<b>Total Baseline Allocation</b>	<b>\$29,516,908</b>	
Previously Approved Projects	\$18,419,400	N/A
Previously Approved Projects	\$2,678,531	TWO - FOUR
Projects 60584, 61307, 58079, and 61073	\$1,500,000	SEVEN
<b>Total Allocated Amounts</b>	<b>\$22,597,931</b>	
<b>Total Remaining Allocation</b>	<b>\$6,918,977</b>	

CalWIN Contract (County Purchases)	Total Amount	Change Order Ref.
<b>Total Baseline Allocation</b>	<b>\$3,968,662</b>	
Previously Approved	\$2,021,592	N/A
Projects 60548 and 60549	\$177,419	FOUR
Projects 60858, 60859, 61078 and 61377	\$262,105	FIVE
Projects 62909, 63220, 62955, and 62287	\$158,426	SIX
Projects 61624, 60975, 61785, 61472, 62259, 62910	\$121,752	SIX
Projects 62197, 63468, 63,600, and 63655	\$42,034	SEVEN
Project 64149	\$9,160	EIGHT
<b>Total Allocated Amounts</b>	<b>\$2,792,488</b>	
<b>Total Remaining Allocation</b>	<b>\$1,176,174</b>	

First Data IRS Contract (Staff Augmentation Services)	Total Amount	Change Notice Ref.
<b>Total Baseline Allocation (Amendment 7)</b>	<b>\$1,000,000</b>	
Previously Approved through June 2022	\$495,552	ONE - FOUR
<b>Total Allocated Amounts</b>	<b>\$495,552</b>	
<b>Total Remaining Allocation</b>	<b>\$504,448</b>	

Infosys Contract	Total Amount	Change Notice Ref.
<b>Total Baseline Allocation</b>	<b>\$10,000,000</b>	
Previously Approved	\$7,002,152	
<b>Total Allocated Amounts</b>	<b>\$7,002,152</b>	
<b>Total Remaining Allocation</b>	<b>\$2,997,848</b>	

ClearBest	Total Amount	Work Order Ref.
<b>Total Baseline Allocation (Change Order 7)</b>	<b>\$7,600,000</b>	
Previously Approved	\$3,104,596	ONE - THIRTEEN
Various Premise Items	\$660,484	FOURTEEN-NINETEEN
Various Premise Items	\$193,065	TWENTY-TWENTY ONE
Transitional Nutrition Benefits Recer / MEDS Transactio	\$41,745	WENTY TWO - TWENTY THREE
Various Premise Items	\$794,680	CO 7 ONE
Implementation Support Staff Augmentation	\$693,450	CO 7 TWO
<b>Total Allocated Amounts</b>	<b>\$5,488,020</b>	
<b>Total Remaining Allocation</b>	<b>\$2,111,980</b>	



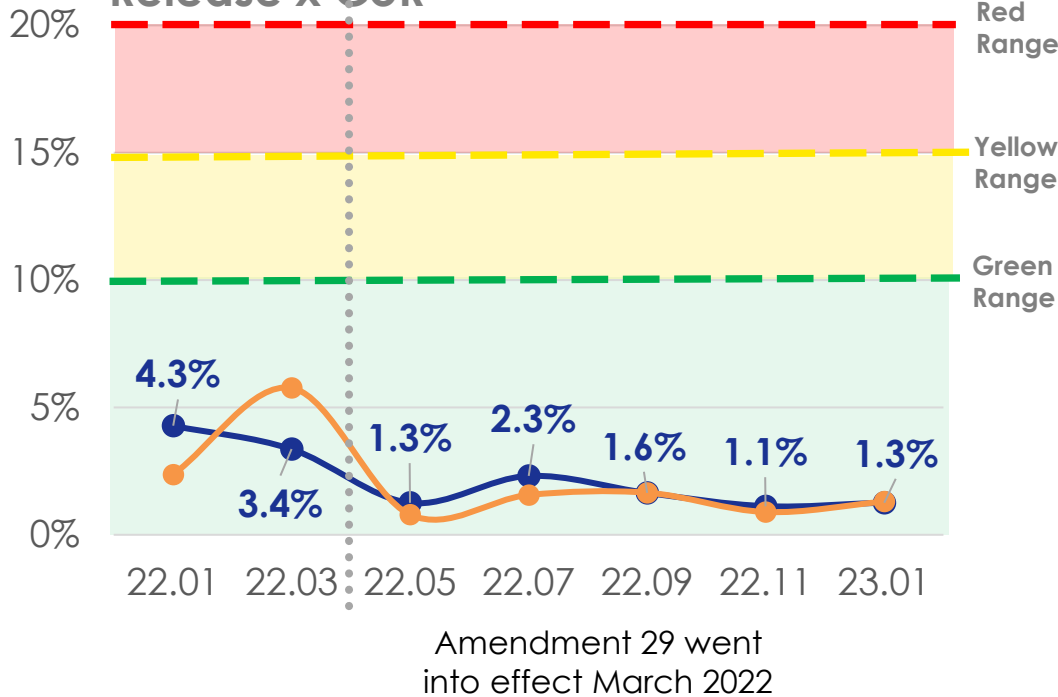
# Quarterly Quality Metrics and SLAs Update

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# CalSAWS Quality, Defect, Stability, Tickets Stats

## CalSAWS Application Release Quality Metrics

### Release x CoR



**Legend:** ■ Onshore + Offshore ■ Offshore

#### TYPICAL RANGES

**GREEN:** The amount of time being spent on rework is lower than expected. This will enable the project to be completed faster and more efficiently.

**AMBER/RED:** The amount of time being spent on rework is higher than expected. This may impact the delivery schedule.

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

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

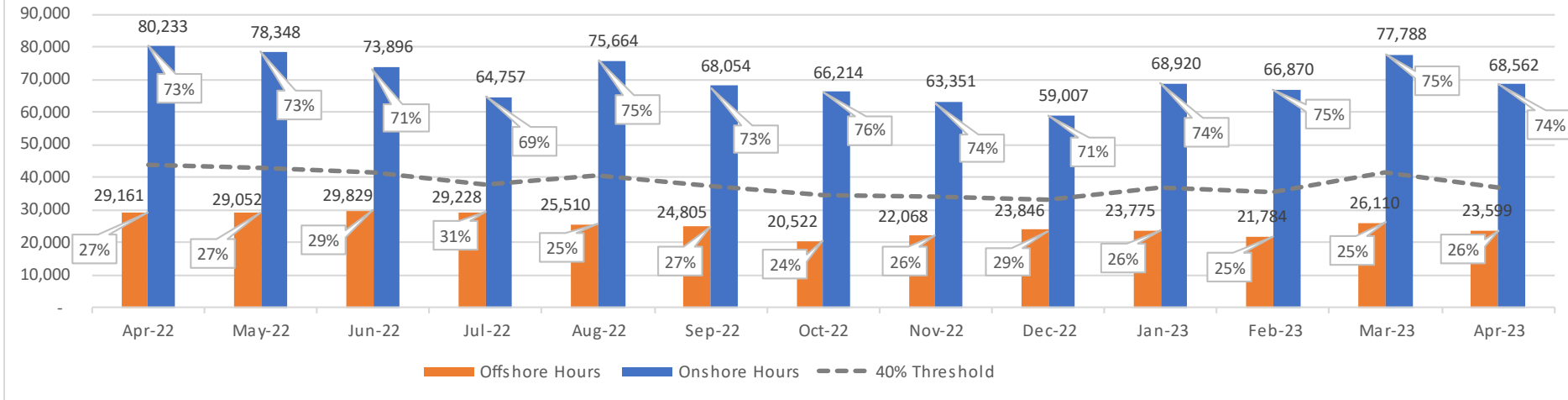
The CoR line graph may increase for the releases if additional defects are found in the future

New releases are added after the next release Go-Live and an analysis can be conducted on the previous release. For example, 23.03 COR numbers will be available after 23.05 goes live at the end of May 2023

# CalSAWS Quality, Defect, Stability, Tickets Stats

## GDN Workload Balance

Onshore vs. Offshore (GDN) Hours Across All Teams



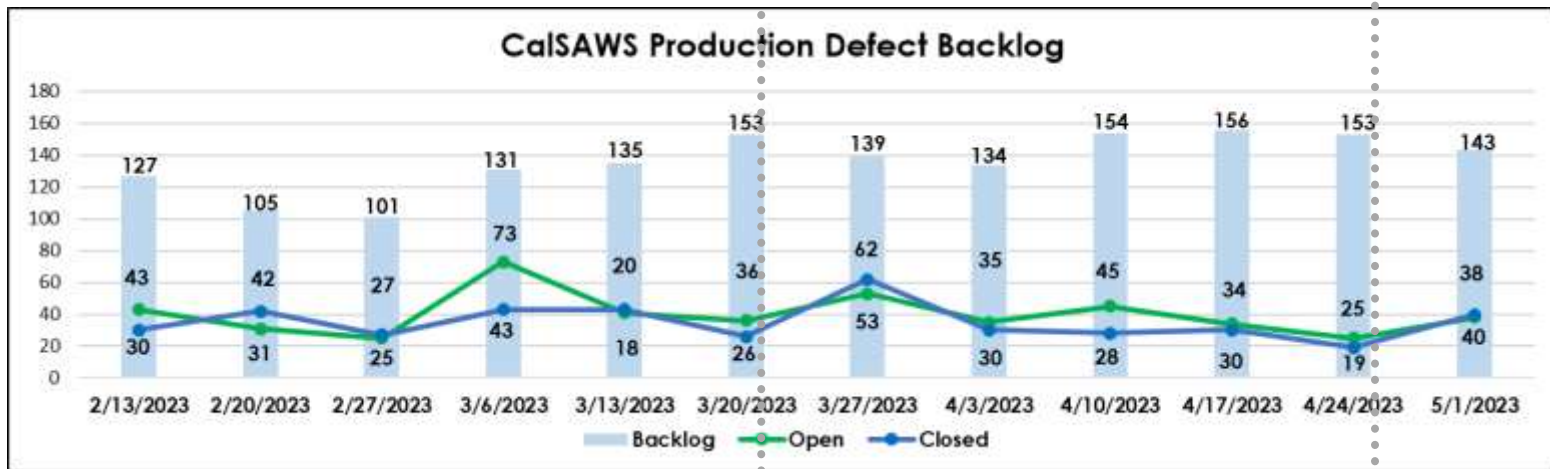
**Per Amendment 29: “Use of GDN resources may approximate 40% of the available hours required for Accenture to deliver its obligations under Exhibit X CalSAWS M&O Extension”**

# CalSAWS Quality, Defect, Stability, Tickets Stats

## Production Defects Backlog

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

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



R23.03 Go-Live  
on 3/20/2023

Wave 3 Go-Live  
on 4/24/2023

# CalSAWS Quality, Defect, Stability, Tickets Stats

## Production SLA Metrics

Perf Req #	LD Applies	Performance Requirement Title	Nov	Dec	Jan	Feb	Mar	Apr *
1		Monthly Off Prime Business Hours Availability	✓	✓	✓	✓	✓	✓
2		Monthly Prime Business Hours Availability of CalSAWS Non-Production Environments	✓	✓	✓	✓	✓	✓
3		Monthly Deficiency Notification Response Time	✓	✓	✓	✓	✓	✓
4		Monthly Helpdesk Diagnosis Time	✓	✓	✓	✓	✓	✓
5	✓	Daily Peak Usage Hours Availability	✓	✓	✗	✗	✗	✓
6	✓	Daily Prime Business Hours Availability	✓	✓	✗	✗	✗	✗
7	✓	Daily Peak Usage Hours ED/BC Response Time	✓	✓	✓	✓	✓	✓
8	✓	Daily Prime Business Hours ED/BC Response Time	✓	✗	✓	✓	✓	✓
9	✓	Daily Peak Usage Hours Screen to Screen Navigation Response Time	✓	✓	✓	✓	✓	✓
10	✓	Daily Prime Business Hours Screen to Screen Navigation Response Time	✓	✓	✓	✓	✓	✓
11	✓	Daily Batch Production Jobs Completion	✓	✗	✓	✓	✓	✓
12		Daily Off Prime Business Hours ED/BC Response Time	✗	✗	✗	✓	✓	✓
13		Daily Off Prime Business Hours Screen to Screen Navigation Response Time	✓	✓	✓	✓	✗	✓
14		Daily Unbounded Search Response Time	✓	✓	✓	✓	✓	✓
15		Daily Prime Business Hours Availability of CalSAWS Training Environments	✓	✗	✗	✓	✓	✓
16		Daily Peak Usage Hours Standard Report Response Time	✓	✓	✓	✓	✓	✓
17	✓	Security Incident Notification	✓	✓	✓	✓	✓	✓
18	✓	Security Incident Reporting	✓	✓	✓	✓	✓	✓
19	✓	Security Incident Negligence	✓	✓	✓	✓	✓	✓
20		Disaster Recovery Response Time	✓	✓	✓	✓	✓	✓

- February misses on Daily Peak Availability, Daily Prime Availability were all due to the same event
- March misses on Daily Peak Availability, Daily Prime Availability were all due to the same event

\* April SLAs are preliminary pending the regularly monthly review meeting

**Legend:** ✓ SLA Met ✗ SLA Not Met ✓ LD Applies



Performance reports are emailed to RMs and posted to the CalSAWS Web Portal for County PPOCs and County Help Desk Staff.

# CalSAWS Quality, Defect, Stability, Tickets Stats

## Hyland Imaging Performance Metrics

### APRIL 2023 PERFORMANCE STANDARDS



#### Monthly Uptime Percentage

Target: 99.90%

Formula:  $1 - (\text{total downtime minutes} / \text{total monthly minutes}) \times 100$

#### Monthly Uptime Target: 99.90%

#### Monthly Uptime Service Level Credits

99.89-99.00%	10% of the Monthly SaaS Fees
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Less than 99.00%	20% of the Monthly SaaS Fees
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<b>April Actual Uptime</b>	<b>100%</b>
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<b>April Service Level Credit</b>	<b>\$0.00</b>
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# CalSAWS Quality, Defect, Stability, Tickets Stats

## Hyland Imaging Performance Metrics

### APRIL 2023 PERFORMANCE STANDARDS



#### Monthly Page View Objective

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

#### Monthly Page View Target: 90%

#### Monthly Page View Service Level Credits

Less than 90%	3.5% of the Monthly SaaS Fees
---------------	-------------------------------

<b>April Actual Monthly Page View Percentage</b>	<b>99.16%</b>
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<b>April Service Level Credit</b>	<b>\$0.00</b>
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# Hyland™

# CalSAWS Quality, Defect, Stability, Tickets Stats

## Hyland Imaging Performance Metrics

### APRIL 2023 PERFORMANCE STANDARDS



#### Database Transaction Objective

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

#### Database Transaction Target: 90%

#### Monthly Database Transaction Service Level Credits

Less than 90%	3.5% of the Monthly SaaS Fees
---------------	-------------------------------

<b>April Actual Database Transaction Percentage</b>	<b>99.97%</b>
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<b>April Service Level Credit</b>	<b>\$0.00</b>
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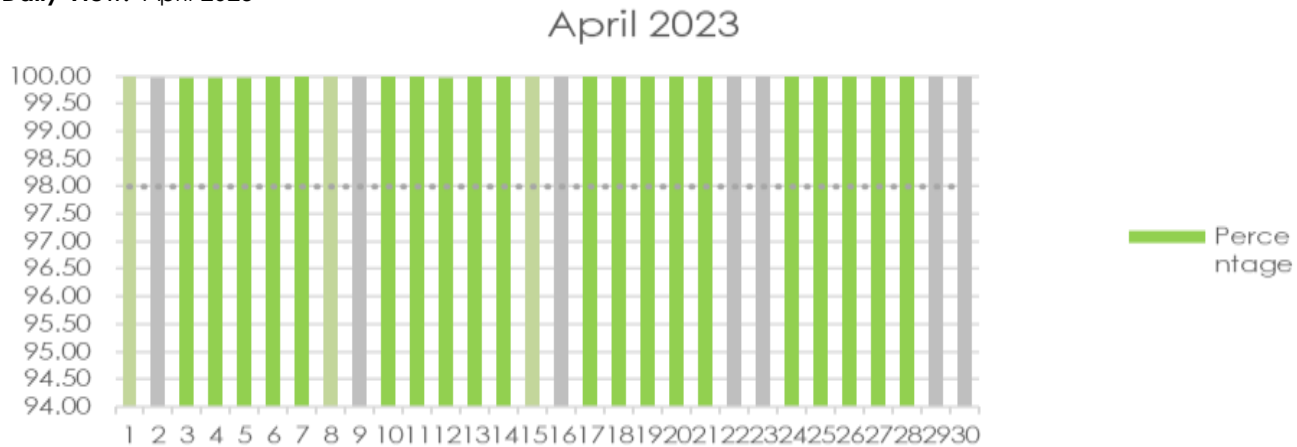
# BenefitsCal Performance Metrics

**SLA #1:** Daily Online transactions – inquiry screens (bounded)\*  
**Target:** 98% with an average response time < 2 seconds  
**Actual:** **Exceeded daily online transaction (bounded) response time at no less than 99.92%** since December 2021. Measured daily and reported on Monthly

**Monthly View:** December 2021 – April 2023



**Daily View:** April 2023

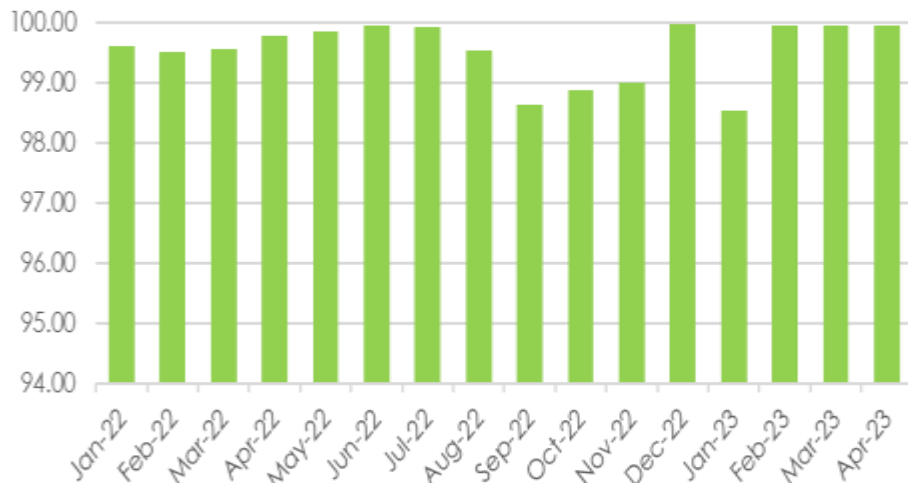


Legend: ■ Target Met ■ Target Not Met ■ Weekend

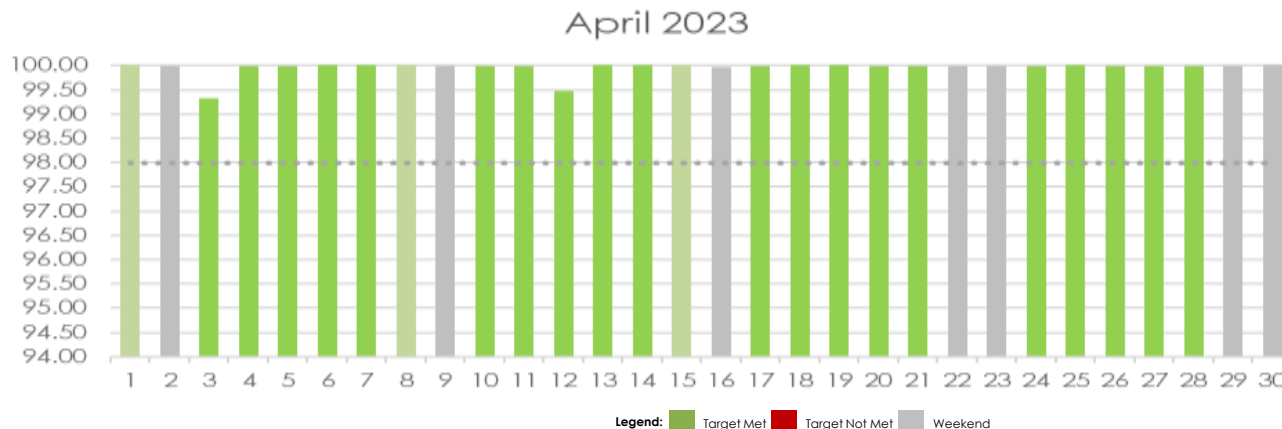
# BenefitsCal Performance Metrics

**SLA #2:** Daily Online transactions – inquiry screens (unbounded)  
**Target:** 98% with an average response time <10 seconds\*  
**Actual:** Exceeded daily online transaction (unbounded) response time at no less than 98.62% since December 2021. Measured daily and reported on Monthly

Monthly View: December 2021 – April 2023



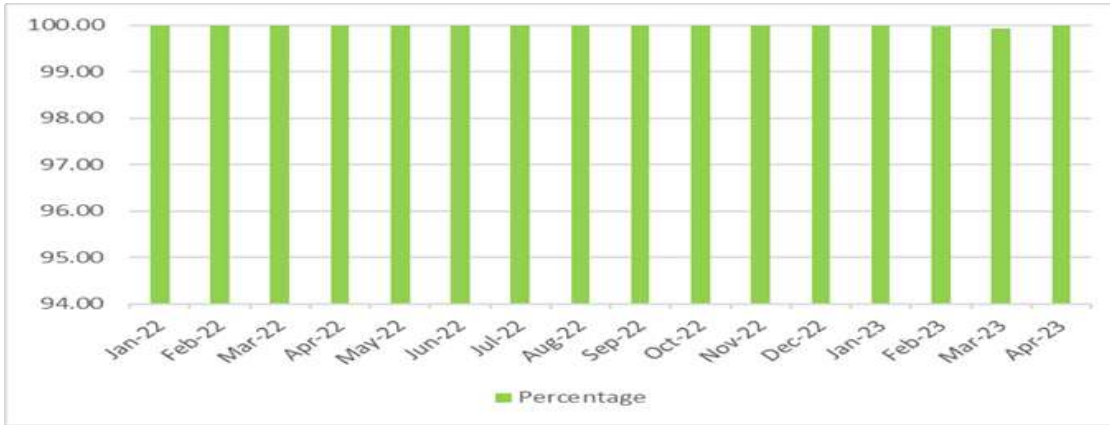
Daily View: April 2023



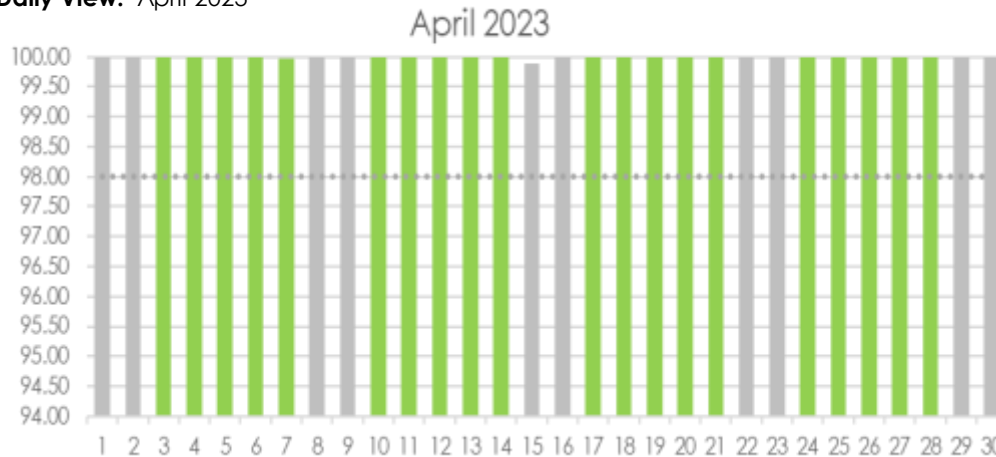
# BenefitsCal Performance Metrics

**SLA #3:** Daily BenefitsCal Hosted API transactions  
**Target:** 98% with an average response time <2 seconds  
**Actual:** **Exceeded daily API transaction response time at no less than 99.97%** since December 2021. Measured daily and reported on Monthly

**Monthly View:** December 2021 – April 2023



**Daily View:** April 2023



Legend: ■ Target Met ■ Target Not Met ■ Weekend



## Wave 3 Go-Live Debrief

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# Wave 3B Conversion Update

## Congratulations Orange, Santa Barbara and Ventura Counties

- Wave 3B conversion finished in 85 hours with the system coming up 1.5 hours early at 6am on Monday, 4/24
  - 1.2 million cases converted
  - 2.7 million Programs
  - 2.5 million Persons/Recipients
  - 23,000 County Users added
  - 4.2 billion rows added to the CalSAWS database
- Contact Center and Imaging solutions went live at the same time.
- All systems have been stable with a new record of 20k plus county workers across the 48 production counties logged in and concurrently working

# Wave 3 BenefitsCal Update

BenefitsCal usage for Wave 3 counties since rollout in April 24, 2023

10724

Applications Submitted

81,423

Documents Uploaded

2,040

Changes Reported

37,814

Customer Accounts Linked

1866

Renewals Submitted

688

Periodic Reports  
Completed

562

CBO Accounts Converted



## Wave 2 Retrospectives



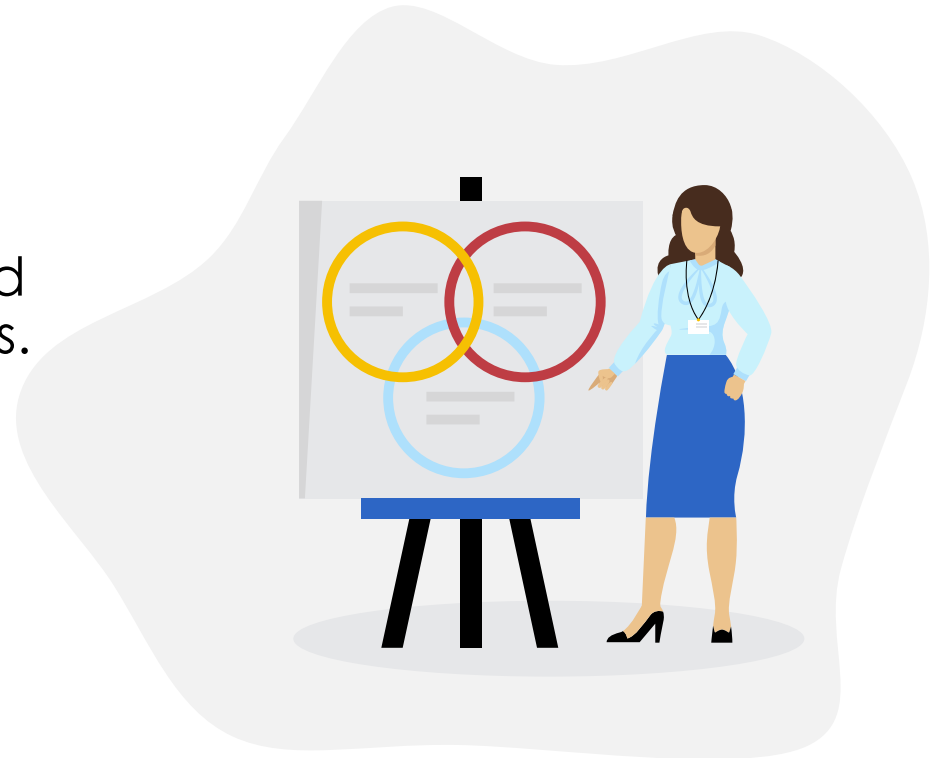
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# Retrospective Approach

## Multifaceted

Reflecting from multiple viewpoints:

1. **Project team sessions** focus on internal observations and enhancement opportunities.
2. **County sessions** capture input directly from the counties based on their migration experience.
3. **(New) Stakeholder session** focused on the end user experience.



# Wave 2 – Project Retrospectives

## Focus & Action

### Focus:

- What worked
- Opportunities for improvement
- Recommended action

### Action:

- Realtime adjustments
- Adjustments in progress



### Session Topics Included:

- ISS Implementation (Pre and Post)
- Organizational Change Management
- Training
- TOSS/Support Teams
- County Data Validation (County)
- Contact Center
- Imaging
- Lobby Management
- Conversion
- BenefitsCal Communication & Resources

# Recommendations, Retrospectives, and Changes

## Lessons Learned from Wave 2



Today, we will cover:

- 1. Retrospective themes from teams** on opportunities for improvement.
- 2. Changes that counties will see** from what we learned with Wave 2.

# OCM, Training & Implementation Retrospectives

## Opportunities for Improvement – Themes



# OCM & Training - Changes for Future Waves

## TOOLS



### OCM

Update Waves 4-6 county profiles with OCM characteristics to support awareness of current state and to better prepare onsite support staff.

Provide OCM support in county offices after Go-Live and collect photos and soundbites for the CalSAWS Scoop newsletter.

### Training

The Training Team continues being proactive about finding solutions on working with the LMS tool.

The Training Team continues proactive communications with the Counties on LMS challenges to manage expectations.

## PROCESSES



### OCM

Continue to work with Counties in refining opportunities and recommendations drafted from Readiness Survey results.

### Training

The Training Team continues active, visible, and frequent communication on training approach and expectations with Counties.

The Training team continues to refine training processes to increase County efficiencies.

## COMMUNICATION



### OCM

Evolve the messaging to managers and supervisors, in Change Discussion Prep sessions, to emphasize the value of the County Change Discussion Guide.

### Training

The Training Team continues emphasizing the importance of training to Counties in various sessions such as TAC meetings, training touchpoints, IPOC meetings, and Change Network meetings using strong collaboration with County partners.

# Implementation – Changes for Future Waves

## TOOLS



### Implementation

Counties have pre-meets with Virtual Support and County Help Desk to strengthen post implementation support processes with virtual channel.

Implementation understands WI-FI connectivity in county offices prior to Go-Live and coordinates with counties to help ensure that WI-FI connectivity is available for onsite support staff.

## PROCESSES



### Implementation

Implementation provides more frequent updates to PPOCs and Regional Managers to highlight county suggested changes for onsite staff coverage.

Implementation incorporates the county escalation model at T-6W into Trip Books and Orientations for onsite staff.

## COMMUNICATION



### Implementation

Implementation sets better expectations for future wave counties on changes to workplan tasks/dates which may evolve over time.

# Contact Center, Imaging & Lobby Management Retrospectives

## Opportunities for Improvement – Themes

The **Contact Center, Imaging & Lobby Management** teams have implemented a variety of processes to improve the county experience based on lessons learned from Wave 2.

Examples:

- Modified the on-site wave support plan to ensure resources are deployed and adjusted (real time) to provide needed support.
- Providing updates more frequently in county meetings.



# Contact Center, Imaging & Lobby Mgmt. - Future Wave Changes

## TOOLS



### Contact Center

Implemented On Site day for Model Office Prep.

Incorporated production log in and Model Office Access testing (Wave 3).

3 full weeks are now available of Model Office (previously 10 days).

### Imaging

County technical imaging checklist has been developed to support preparation for Wave 3-6.

Updated County Worker Virtual Assistant to include 10 additional questions.

## PROCESSES



### Lobby Management

A county purchase tracking process has been developed to manage kiosk and tablet orders to support county preparation.

## COMMUNICATION



### Contact Center

The Pre-Model Office Presentation deck has been adjusted for Waves 3-6 to both review information and facilitate interactive validation to improve participant understanding.

Providing updates more frequently at county meetings.

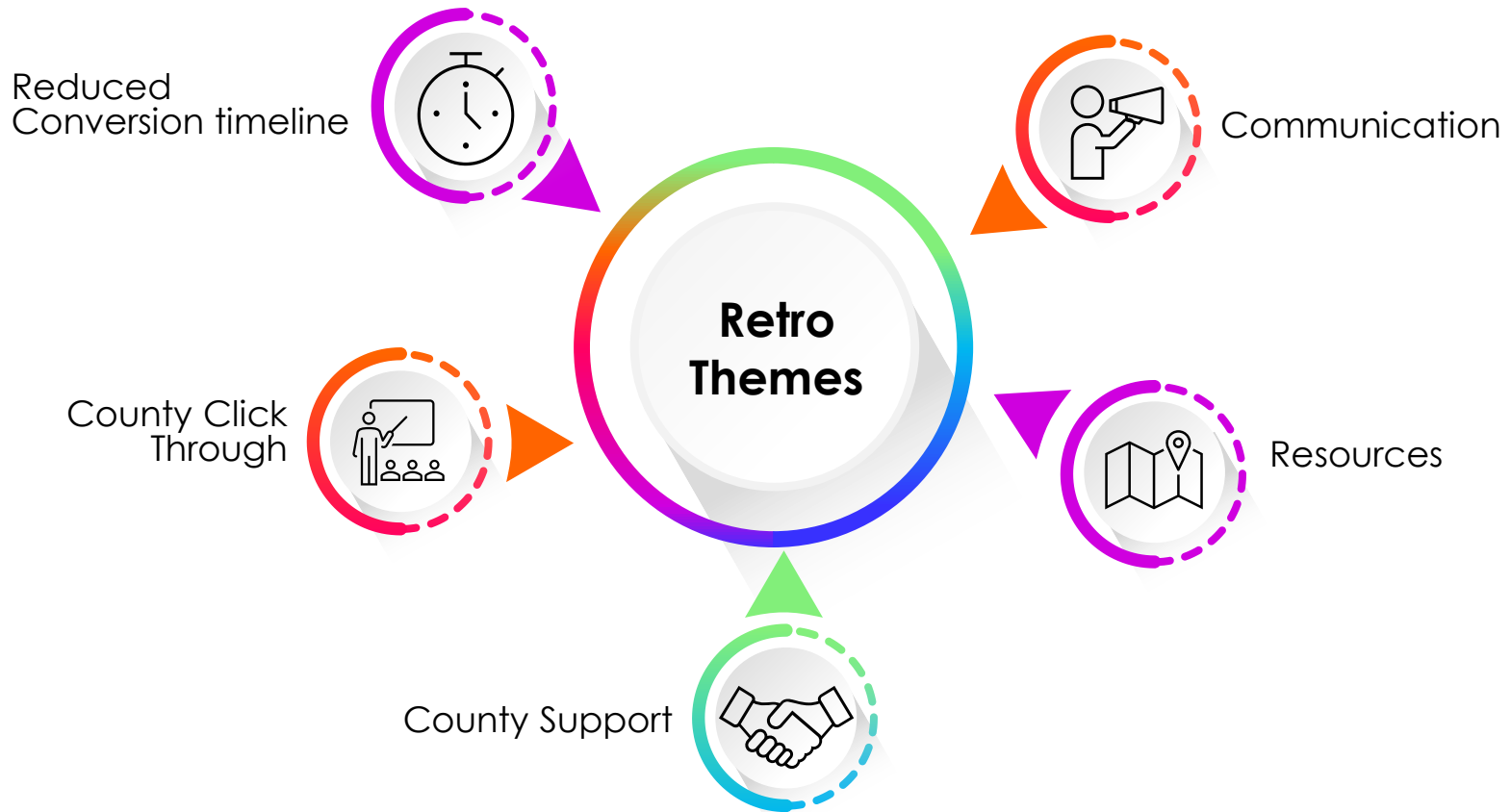
### Imaging

Conducting additional Imaging BPR and best practices sessions with each of the Wave counties.

Adjusting delivery of demo/training to pre-go-live from post go-live.

# County Data Validation (CDV) & Conversion Retrospective

## Opportunities for Improvement – Themes



# CDV & Conversion - Future Wave Changes

## TOOLS



### CDV

“Body of Knowledge” resource developed to support counties when logging findings.

CalWIN to CalSAWS page mapping document developed.

Q&A document from Office Hours/Triage meetings published and updated daily.

### Conversion

A proof of concept and assessment of the Goldengate tool is in progress to expedite the data conversion timeline.

## PROCESSES



### CDV

Additional training topics and resources are being incorporated into the CDV Execution Kickoff session to help counties better prepare.

### Conversion

Conversion team will further refine the approach, schedule, and facilitation for County Click through sessions Wave 3-6 to maximize the time required and benefits achieved by participants.

## COMMUNICATION



### CDV

A subset of the Go-Live content is now being shared proactively with all future Wave counties.

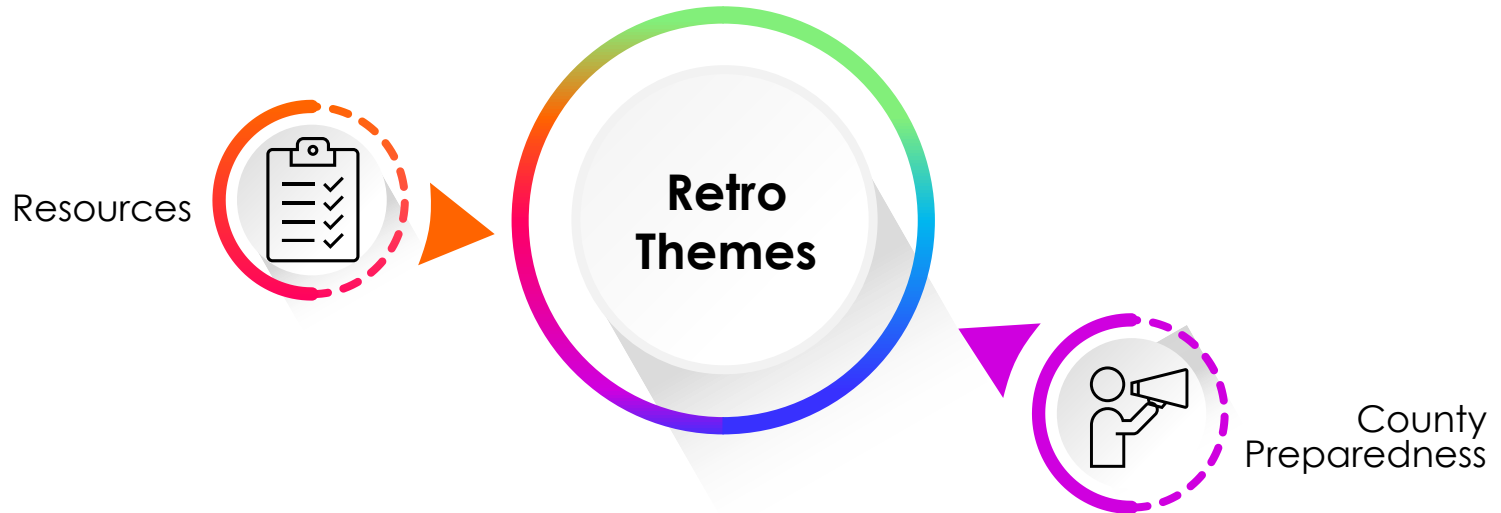
### Conversion

Refined county click through recruitment CRFI to clearly state expectations and time commitment of county participants.

Evolved county communication to clarify expectations that validation activities are being conducted at a high-level. (Wave 3-6)

# BenefitsCal Retrospective

## Opportunities for Improvement – Themes



# BenefitsCal – Future Wave Changes

## PROCESSES



Scheduled BenefitsCal staff to visit county lobbies to promote adoption, support the public in accessing services through BenefitsCal, and generate enthusiasm.

Provided suggested language to incorporate into County call center hold recording to promote BenefitsCal.

## COMMUNICATION

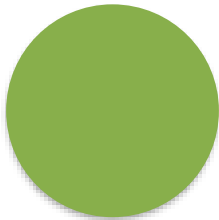


BenefitsCal FAQ distributed to counties to highlight functions and capabilities.



## Future Wave Readiness

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



# Executive Summary: Wave 4 – 6 Readiness

Project Readiness Areas and Categories [as of 5/5/2023]

Readiness Area*	Readiness Category	Wave 4	Wave 5	Wave 6
<b>Application</b>	Deploy CalSAWS Releases 23.0#	G	NS	NS
	Contact Center Readiness	G	G	
	Imaging Readiness	G	G	
	BenefitsCal Readiness	G	NS	NS
	Central Print Readiness	G	G	
<b>Integration</b>	County Interface Partner Test (IPT) Execution	Y	NS	NS
	State Interface Partner Test (IPT) Execution	C	NS	NS
<b>Conversion &amp; CalWIN Migration Planning</b>	Defects Resolution	G	NS	NS
	EDBC Match – Auto Review Rates	G	NS	NS
	Mock Cutover	G	NS	NS
	Cutover Window	G	NS	NS
<b>Technical</b>	County Network Connectivity	G	G	G
	Performance Testing	NS	NS	NS
<b>Training</b>	Wave County Classroom Set-Up	C	NS	NS
	WBT Training Delivery	G	G	NS
	ILT Training Delivery	G	NS	NS
<b>Organization</b>	Change Discussion Guides (CDGs)	C	C	NS
	Communications	G	G	G
	Business Process Reengineering	C	C	C
	Configuration	C	G	G
	Process Simulation	G	NS	NS
<b>Implementation</b>	Implementation Planning	G	G	G
	County Prep	G	NS	NS
	Pre and Post Implementation Support	G	G	G
	Help Desk	G	G	G
	County Ad Hoc Reports	G	G	G

# County Readiness Summary: Wave 4, 5, and 6 County Readiness [as of 5/5/2023]

Readiness Area	Wave 4					Wave 5				Wave 6		
	San Diego	San Mateo	Santa Cruz	Solano		Alameda	Fresno	Sonoma		Sacramento	San Luis Obispo	San Francisco
Application	G	G	G	G		G	G	G		G	G	G
Integration	G	G	G	G		Y	G	Y		G	G	G
Conversion	G	G	G	G		G	G	G		G	G	G
Technical	G	G	G	G		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	G	G	G	G		G	G	G		G	G	G

NS	Not Started	G	On Schedule	Y	<14 Days Late	R	>=14 Days Late
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## Wave 4 County Readiness Checklist Activities by Status (as of 5/5/2023)

Status	00 All Counties	09 San Diego	10 San Mateo	11 Santa Cruz	12 Solano	Wave 4 Counties	T:
IN PROGRESS	3	92	107	94	99	19	414
NOT STARTED	1	121	146	140	140	87	635
COMPLETED	27	381	375	395	390	57	1625
<b>Total Unique Issues:</b>	<b>31</b>	<b>594</b>	<b>628</b>	<b>629</b>	<b>629</b>	<b>163</b>	<b>2674</b>

## Wave 5 County Readiness Checklist Activities by Status (as of 5/5/2023)

Status	00 All Counties	13 Alameda	14 Fresno	15 Sonoma	Wave 5 Counties	T:
IN PROGRESS	2	92	97	85	13	289
NOT STARTED	0	209	204	207	134	754
COMPLETED	8	375	365	372	27	1147
<b>Total Unique Issues:</b>	<b>10</b>	<b>676</b>	<b>666</b>	<b>664</b>	<b>174</b>	<b>2190</b>

## Wave 6 County Readiness Checklist Activities by Status (as of 5/5/2023)

Status	00 All Counties	16 Sacramento	17 San Francisco	18 San Luis Obispo	Wave 6 Counties	T:
IN PROGRESS	3	103	98	91	6	301
NOT STARTED	0	257	274	260	161	952
COMPLETED	8	304	294	317	11	934
<b>Total Unique Issues:</b>	<b>11</b>	<b>664</b>	<b>666</b>	<b>668</b>	<b>178</b>	<b>2187</b>

## County Readiness Highlights

### Wave 5

- Integration Readiness – County development for Alameda and Sonoma are a watch item. Alameda has 4 interfaces still in County development and Sonoma has 7 interfaces in County development. Project interface partner testing begins on 5/17/2023.

# Risk 258: Wave 4B Cutover Timings

*Initial 4B Mock Cutover timing resulted in a 90-hour window*

Proof of concepts for GoldenGate are in progress for use in the conversion load processes that may result in a 6-hour reduction, showing 4B completing in 84 hours

- ❑ GoldenGate is a database tool that allows the converted data to be loaded into CalSAWS production as the conversion process runs vs having to wait for the full conversion process to complete before loading into CalSAWS production.
- ❑ Wave 4B is estimated to contain 11% more data than 3B
  - » 2B completed in 87.5 hours (with a 2 hour county clickthrough window)
  - » 3B completed in 85 hours (1.5 hours ahead of schedule with a 3 hour county clickthrough window)
- ❑ Wave 4B County Click-through will remain at 3 hours
- ❑ Additional areas that are being evaluated to reduce the Wave 4B timings are:
  - » Further conversion process performance tuning
  - » Additional automation of database administrator tasks that occur after the conversion process is complete and before the system is brought online for county clickthrough
- ❑ The Wave 4B cutover window is targeted to be finalized and communicated by May 31st

# Risk 258: Wave 5 & 6 Go-Live Cutover Timings Projected

## *Initial Analysis for Wave 5 & 6*

- **Waves 5 thru 6:**
  - Wave 5 estimated to contain 22% **more** data than Wave 3B
  - Wave 6 estimated to contain 14% **less** data than Wave 3B
    - Wave 6 is estimated to complete within same timeframe as Wave 3B (~ 84 hours). Data growth on both CalWIN and CalSAWS may have an impact. Timings will be confirmed through the Mock 6B test in August 2023.
  - Cutover timings for both Waves 5 and 6 will be revised based on Wave 4B Go-Live actuals (for assessment and estimating)
  - Testing of GoldenGate and additional performance tuning of the cutover logic will be ongoing throughout the waves
  - Mock Cutovers will be executed to confirm the improvements and finalize the Cutover schedule
  
- **Next Steps:**
  - » Continue technical validation
  - » Complete the Wave 5 Mock Cutovers to set the baseline cutover timing by June 30
  - » Complete the Wave 6 Mock Cutovers to set the baseline cutover timing by Sep 30

# Project Risks

## CalWIN Counties Cutover Readiness Needs Risks

Risk	Risk Name	Wave 4	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	Low	Medium	Medium
264	CalWIN County waves may not complete their Imaging migration readiness activities by their designated wave go-live dates	Low	Low	Medium
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	Medium
281	Changes to San Diego County PoP site location resulting in additional effort and costs to complete a parallel enablement	Medium		
283	Circuit delivery delays to Wave 5 - Fresno County		Low	
288	Wave 6 San Francisco County – Delays in Circuit delivery			Low
289	Transition from CalWIN Lite to CalSAWS - BenefitsCal - Child Care Portal for external partners	Low		

## Project Readiness for CalWIN Cutover to CalSAWS Risks

Risk Name	Wave 4	Wave 5	Wave 6
The CalWIN Conversion Cutover Window is at-risk of completing past the 84-hour cutover window	High	High	Low
Preparing CalWIN counties to operationalize CalSAWS after their Go-Live	Low	Medium	Medium
CalWIN Counties may not be prepared to reconcile Fiscal and submit State Reports, timely, as they Migrate to CalSAWS	Medium	Medium	Medium
Unresolved Go-Live Dependent defects not resolved prior to the Wave Go-Live could impact County Case Worker business Post Go-Live	Medium		

# Project Risks

## CalSAWS Scalability & System Performance Risks

Risk	Risk Name	Wave 4	Wave 5	Wave 6
237	The scaling of Batch for 58 Counties may have an impact on system performance	Low	Low	Low
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	Medium
256	Imaging Scalability, Performance degradation, and Operational Process risk may impact the go-live dates for upcoming Counties	Low		



## BenefitsCal Update

- Results of previous Communication/Marketing Campaigns (Action Item)
  - Access to Training Environment for CBOs and Counties (Action Item)
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# BenefitsCal Marketing Campaigns

Targeted Marketing Campaigns Determined by Stakeholder Priorities

Six campaigns prioritized by multiple stakeholder groups including Counties, CWDA, CalSAWS Consortium, CDSS, DHCS, and Advocates



# BenefitsCal Marketing Campaigns – Fall 2022

## Campaigns Used Calls to Action to Drive Usage

CAMPAIGN	CALL TO ACTION	AUDIENCE	DATE
<p>Nudge customers with an <b>incomplete application</b> to complete the application</p>	<p><b>Complete</b> an in-progress BenefitsCal application</p>	<p>Customers with an incomplete applications</p>	<p>9/8/2022</p>
<p>Promote awareness of <b>renewal features</b> in BenefitsCal.</p>	<p><b>Complete renewal</b> via BenefitsCal</p>	<p>Customers with <b>upcoming renewal</b>, with a BenefitsCal account</p>	<p>9/8/2022</p>
<p>Nudge customers who <b>submitted a paper application and included email address or mobile phone number</b>, to create a BenefitsCal account.</p>	<p><b>Create an account</b> on BenefitsCal</p>	<p>Customers who submitted a <b>paper application</b></p>	<p>9/7/2022</p>
<p>Promote awareness of <b>reporting features</b> in BenefitsCal.</p>	<p>Create an account on BenefitsCal (+potentially <b>complete a renewal</b>)</p>	<p>Customers with upcoming renewal, <b>without a BenefitsCal account</b></p>	<p>9/8/2022</p>
<p>Promote awareness of account features (such as <b>Report a Change, Document Upload, Periodic Report/Renewals, Support Requests, Messaging, and Appointments</b>) after a customer creates an account.</p>	<p><b>Login to manage benefits</b> using BenefitsCal</p>	<p>Customers after they create an account on BenefitsCal and not a case linked</p>	<p>9/7/2022</p>
<p>Nudge customers to log into their account <b>after they receive an alert</b> (e.g., new messages, action, report).</p>	<p><b>View messages</b></p>	<p>All users with an <b>unread message</b> in their BenefitsCal account</p>	<p>9/7/2022</p>

# BenefitsCal Marketing Campaign Outcomes

More than 139,000 Actions Resulting from 6 Campaigns

Industry  
benchmark is 2.8%

Call to Action (CTAs)	Rate of Click Through	CTA Impacts
Complete in-progress BenefitsCal application	5.64%	<ul style="list-style-type: none"><li>• <b>1,768</b> Applications Submitted</li></ul>
Complete renewal via BenefitsCal	10.68%	<ul style="list-style-type: none"><li>• <b>1,411</b> Renewals Submitted</li></ul>
Create an account on BenefitsCal	2.72%	<ul style="list-style-type: none"><li>• <b>2,083</b> Accounts Created</li></ul>
Create an account on BenefitsCal (+potentially complete a renewal)	2.31%	<ul style="list-style-type: none"><li>• <b>1,414</b> Accounts Created</li><li>• <i>930 Renewals Submitted</i></li></ul>
Login to manage benefits using BenefitsCal	7.53%	<ul style="list-style-type: none"><li>• <b>43,472</b> Logins</li><li>• <i>28,646 EBT Balance Views</i></li><li>• <i>35,031 Message Center Views</i></li><li>• <i>23,778 Documents Uploaded</i></li></ul>
View messages	23.25%	<ul style="list-style-type: none"><li>• <b>530</b> Message Center Views</li></ul>

# BenefitsCal

## Training Environment Readiness – CBO Users

Action Item: Confirm whether CBOs that aren't doing direct assistance through BenefitsCal can still have access to the training environment

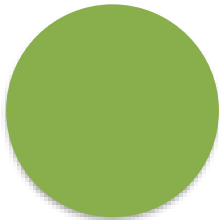
### Support Model for the Training Environment

	CBO Users	Status
User Access	<ul style="list-style-type: none"><li>✓ Access environment with an access code, shared via email to active CBO Managers in Production</li><li>✓ Pre-approved CBO accounts created for ease of access and shared via email</li></ul>	<ul style="list-style-type: none"><li>✓ Extraction of active CBO Managers in ForgeRock is COMPLETE</li><li>✓ Creation of Pre-approved CBO accounts in ForgeRock is COMPLETE</li></ul>
Features/ Data	<ul style="list-style-type: none"><li>✓ Includes production features for CBO functionality (excluding chat)</li><li>✓ Data refresh follows existing training refresh schedule (i.e., quarterly)</li></ul>	<ul style="list-style-type: none"><li>✓ Smoke testing to validate Features are tested End-to-End across systems COMPLETE</li><li>✓ Aligned with existing refresh schedule</li></ul>
Support	<ul style="list-style-type: none"><li>✓ Report technical issues through AskCalSAWS channel</li><li>✓ Pre-release updates will be shared through bi-monthly trainings, Quick Reference Guides or YouTube</li></ul>	<ul style="list-style-type: none"><li>✓ On Schedule</li></ul>
Target	<ul style="list-style-type: none"><li>✓ May 2023</li></ul>	<ul style="list-style-type: none"><li>✓ On schedule</li></ul>



## Technical Operations Update

- Production Outage Calendar



# CalSAWS Quality, Defect, Stability, Tickets Stats

## April 2023 Production Highlights

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10 7:15am-8:06am Custom CCP unavailable 4:18pm-5:12pm OTP were not sent	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6



## Update on Key QA Activities

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# Quality Assurance Team

## QA Functional/Test, Technical, Migration Highlights

CalSAWS Independent Test Results				
Release	# SCRs Reviewed	# SCRs Tested	# Scenarios Passed	Total Defects Found
CalSAWS 23.05	11	9	282/283	8
BenefitsCal 23.05	12	2	87/87	11
<b>Total</b>	<b>23</b>	<b>11</b>	<b>369</b>	<b>19</b>

### Functional/Test Highlights

23.05 CalSAWS/BenefitsCal In Progress

23.05 Defect Fix Reviews In Progress

QA Technical Reviews			
<b>21</b> CalSAWS SLAs Reviewed	<b>3</b> Hyland SLAs In Review	<b>2</b> County-wide System Impacts	<b>16</b> CC/Lobby Management Designs Reviewed

### Technical Highlights

System Performance

Contact Center(CC) and Lobby Management QA

County-wide System Impacts

QA Migration Reviews			
<b>80</b> CDV Testers Supported	<b>3</b> Golden Gate POC Results Reviewed	<b>9</b> Retrospectives	<b>10</b> Implementation Support Staff To Be Deployed

### Migration Highlights

Wave 4 County Data Validation (CDV)

Golden Gate Proof of Concept Reviews

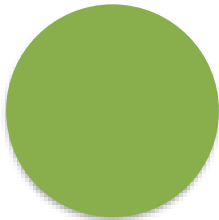
Lessons Learned & Retrospectives

Implementation Staff Support



## Procurement Updates

- AWS Services Update
- BenefitsCal RFP



# 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

# BenefitsCal Reprourement

## Key Procurement Tasks

	Procurement Event	Dates
1	Prepare RFP	January 4, 2023 – January 16, 2024
2	Develop Requirements	March 6 – June 5, 2023
3	Consortium, Stakeholder and State Review of Requirements	June 6 – August 4, 2023
4	Consortium, Stakeholder, State and Federal Reviews and Approval of the RFP	January 17 – May 28, 2024
5	Release RFP	May 29, 2024
6	Proposals Due	July 30, 2024
7	Evaluate Compliance, Firm Qualifications, Business and Price Proposals, and BAFOs	July 31, 2024 – February 5, 2025
8	Vendor Selection Report Preparation and Approvals	February 6 – March 18, 2025
9	Publish Notice of Intent to Award and VSR	March 19, 2025
10	Contract Negotiations	March 24 – April 3, 2025
11	State Contract Approval	April 4 – May 8, 2025
12	Federal Contract Approval	May 9 – July 14, 2025
13	Contingency Period	July 15 – August 18, 2025
14	JPA BOD Approval	August 22, 2025
15	Contract Start	September 2, 2025
16	Transition-In Period	September 2, 2025 – February 27, 2026

# 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)
  - Submission for State review: May 31, 2023.
  - State and Federal Review: June 1 – July 31, 2023.
  - JPA Approval planned for August 18, 2023 for an effective date of September 1, 2023.



Overview of the June 2023 JPA  
Membership Meeting



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# JPA Member Representatives Meeting

June 29, 2024 | 8:30 a.m. – 12:00 p.m.

- Requires quorum of the 58-County Directors (Member Representatives)
- Annual election of:
  - JPA Board Members
  - PSC Members
- Migration Update
  - Risk 289 Update
- BenefitsCal Update
- IDEA Update
- Innovation/Bots Update



## Update on Key State IV&V Activities

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# Independent Validation & Verification (IV&V)

## Key Activities



### CalSAWS and BenefitsCal Releases

- CalSAWS 23.05 Testing
- BenefitsCal Development and Testing



### Imaging

- Production defect resolution and enhancements
- Migration of images and documents from CalWIN to CalSAWS for Wave 4



### Batch Performance

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



### CalWIN Data Conversion

- Wave 3 Conversion, Wave 4 Mock Conversion
- Triage and Resolution of open Conversion Defects
- Mitigation actions for improving the conversion cutover window for future CalWIN waves



### CalWIN Implementation

- Wave 2 and 3: Post Implementation Support
- Wave 4 through 6 Implementation Readiness



Adjourn Meeting

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