



CalSAWS | Project Steering Committee Meeting

August 17, 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 July 20, 2023, PSC Meeting and review of Action Items.



Informational Items



Recent Production Issues

CalSAWS Quality, Defect, Stability, Tickets Stats

July 2023 Production Highlights

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
25	26	27	28	29	30	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	26	27	28	29
30	31	2	3	4	5	6

11:16am-12:05pm
Slowness reported
in OCR image
processing times

9:30am - 4pm image
processing slowness
8:20am - 10am lobby
kiosk access issues

Batch delayed
finish due to DCR

Recent Production Issues

Summary of incidents for July

Imaging Processing:

- July 12, 2023 @ 11:16 AM, the Hyland optical character recognition service became slow
- Service was restored at 12:05 PM after a compute node restart

Lobby Management / Kiosk:

- July 24, 2023 @ 8:20 AM, 21 counties experienced kiosk access issues due to change introduced through the 23.07 release
- The change was rolled back at approximately 10 AM to resolve the issue

Imaging Slowness:

- July 24, 2023 @ 9:30 AM Hyland determined that SCR CA-231814 introduced as part of 23.07
- This issue was resolved by rolling back changes under CA-231814, returned to normal on 7/25/2023 by 1:00 PM

Reports Delayed:

- July 31, 2023, reports delayed due to long running Data Change Request

Recent Production Issues

Foster Clothing Allowance Issue

Issue:

- Monday, July 10th the Annual Clothing Allowance for 2023 ran for Tulare County with the incorrect amounts for Kin-GAP, AAP, and Foster Care.
- Tuesday, August 1st the same process issued with incorrect amounts for the following counties:
 - Santa Barbara
 - Santa Clara
 - Santa Cruz
 - Ventura
 - Yolo
- All cases were sent a Clothing Allowance Approval NOA. This has caused an influx of calls/questions to the counties. CalSAWS provided a list of all cases, inclusive of issued and skipped issuances, on August 4, 2023

Plan to Resolve:

- Met with the impacted counties to identify how to resolve this issue on a county-by-county basis.
- CA-265840 is targeted for production deployment on Tuesday night, August 15, 2023.
- Project will properly apply the results of the latest CRFI provided by the counties via CA-242611.
- Additionally, CalSAWS will confirm/update necessary processes to avoid this issue in the future.

Actionable Areas

Progress Update

This is an update on progress to date on improvement initiatives for production operations.

Action Area	Status	Target Completion
Analyze existing systems monitoring and alert thresholds to identify gaps and tuning opportunities	Review existing monitoring and alerting, to validate alignment with best practices for the vendors	September
Harden remediation processes for high-impact outage scenarios	Review output with consortium and QA;	September – Forge Rock
	Tabletop Exercise to align on criteria for failover	DB Failover – January 2024
Assess scheduling of maintenance procedures to minimize downtime	Discussion with TPOCs to enhance engagement and communication to coordinate and execute changes	Completed - July
Further hardening of threat detection capabilities and preventative measures	Analysis complete, implementation planned	August 25



Future Waves Readiness

- Waves 5 and 6 Readiness
 - Waves 5 and 6 Risk Summary
 - Risk 293 COLA Timing and Wave 5
- 
-

Executive Summary: Wave 5 – 6 Readiness

Project Readiness Areas and Categories [as of 8/14/2023]

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

County Readiness Summary: Wave 5 and 6 County Readiness [as of 8/14/2023]

Readiness Area	Wave 5			Wave 6		
	Alameda	Fresno	Sonoma	Sacramento	San Luis Obispo	San Francisco
Application	G	G	G	Y	G	G
Integration	C	C	C	G	G	G
Conversion	G	G	G	G	G	G
Technical	C	C	C	C	C	G
Training	G	G	G	G	G	G
Organizational	G	G	G	G	G	G
Implementation	G	G	G	G	G	G

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

Wave 5 County Readiness Checklist Activities by Status (as of 8/14/2023)

Status	00 All Counties	13 Alameda	14 Fresno	15 Sonoma	Wave 5 Counties	T:
IN PROGRESS	2	115	103	93	36	349
NOT STARTED	0	57	51	49	34	191
COMPLETED	8	499	519	517	100	1643
Total Unique Issues:	10	671	673	659	170	2183

Wave 6 County Readiness Checklist Activities by Status (as of 8/14/2023)

Status	00 All Counties	16 Sacramento	17 San Francisco	18 San Luis Obispo	Wave 6 Counties	T:
IN PROGRESS	3	114	99	105	24	345
NOT STARTED	0	134	143	132	106	515
COMPLETED	8	417	429	427	44	1325
Total Unique Issues:	11	665	671	664	174	2185

County Readiness Highlights












Wave 6

- Application Readiness – Imaging readiness for Sacramento County is a watch item. The County will provide a cutover plan for their delta images.

Wave 5: 5B Cutover Weekend Calendar

Go-Live Event Cutover: System Down Time Calendar*







The Wave 5B cutover window has been communicated via CIT 0252-23

	Thursday 8/31/23	Friday 9/1/23	Saturday 9/2/23	Sunday 9/3/23	Monday 9/4/23
CalWIN Counties (3)		 NO changes to system downtimes for CalWIN Counties and Customers <i>Business as usual</i>			
Alameda, Fresno, Sonoma Customers		 My BCW Not available beginning 8/31 at 5:00 PM. Apply for Medi-Cal on Covered CA and CalFresh at GetCalFresh until Monday 9/4 by 6:00 AM (and then directed to BenefitsCal).			 9/4 by 6:00 AM Production Available
Alameda, Fresno, Sonoma Staff		 CalWIN Remains available from 8/31 5:00 PM – 6:00 PM for workers to register applications from MyBCW .  CalWIN Not available beginning 8/31 at 6:00 PM  OCAT Not available beginning 8/31 at 6:00 PM			
CalSAWS Customers and CBOs		 CalWIN is available for <i>read-only</i> beginning 9/1 at 6 AM, pending conversion outcomes	 BenefitsCal is available for customers and CBO users without MFA enabled to submit applications beginning Friday, 9/1 at 8:00 PM until Monday, 9/4 by 6:00 AM	 BenefitsCal Not available Monday 9/4 at 3:00 AM until Monday 9/4 by 6:00 AM to customers and CBOs (maintenance mode)	
CalSAWS Production		  CalSAWS Production and Self Service in IVR not available beginning Friday 9/1 at 8:00 PM until Monday 9/4 by 6:00 AM. Contact Center available (limited) beginning Friday 9/1 at 8:00 PM until Monday by 6:00 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			

*as of 7/15/23

Wave 5C/6A Cutover Weekend Calendar

Wave 5C/6A (County Prep Cutover)

	Friday 9/15/23	Saturday 9/16/23	Sunday 9/17/23	Monday 9/18/23
Read Only Counties		NO changes to system downtimes for CalWIN Counties and Customers <i>Business as usual (Normal Sunday Maintenance)</i>		
Sacramento San Francisco San Luis Obispo		 CalWIN Not available beginning 9/16 at 6 PM	 CalWIN is available beginning 9/18 at 6 AM	
CalSAWS Customers and CBOs		BenefitsCal is available for customers and CBO users without MFA enabled to submit applications beginning Friday 9/15 at 8 PM until Monday 9/18 at 6 AM		
CalSAWS Production		 CalSAWS Production and IVR not available beginning Friday 9/15 at 8 PM until Monday 9/18 at 6:00 AM. Contact Center available (limited) beginning Friday 9/15 at 8 PM until Monday 9/18 at 6:00 AM.		
CalSAWS: LMS, PRT, Sandbox, Training	NO changes to system downtimes for CalSAWS PRT and LMS for CalSAWS County Staff			



*as of 8/15/23

Risk 258: Wave 6 Go-Live Cutover Timings Projected

Waves 6:

- Wave 6 will contain less data than Wave 4B
- Wave 6 is estimated to complete within the 84-hour window. Data growth on both CalWIN and CalSAWS may have an impact. Timings will be confirmed through the Mock 6B test in August 2023.

Next Steps:

- Complete the Wave 6 Mock Cutovers to confirm the baseline 84-hour cutover timing by Sep 30
 - CalWIN production for Wave 6 counties goes down at 6pm on Thursday, Oct 26
 - CalSAWS production for 55 counties goes down at 8pm on Friday, Oct 27
 - CalSAWS production for 58 counties comes up by 6am on Monday, Oct 30

Project 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	Low
264	CalWIN County waves may not complete their Imaging migration readiness activities by their designated wave go-live dates	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
289	Transition from CalWIN Lite to CalSAWS - BenefitsCal - Child Care Portal for external partners	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	Low	Low
285	Preparing CalWIN counties to operationalize CalSAWS after their Go-Live		Low
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	
293	Delay in benefits to customers due to the lack of final numbers that prevents executing the 2023 CF COLA, CW MAP Increase, CW IRT Levels batch processes prior to Wave 5 cutover	High	


CalSAWS Scalability & System Performance Risks

Risk	Risk Name	Wave 5	Wave 6
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

Updated as of 8/14/23

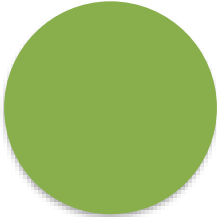
CalWIN Counties Cutover Readiness Needs Risks

Risk 293: Delay in benefits to customers due to the lack of final numbers that prevents executing the 2023 CF COLA, CW MAP Increase, CW IRT Levels batch processes prior to Wave 5 cutover

Risk #293	Risk Description & Mitigation Plan	Risk Status
<p>293.5</p> 	<p>Running the COLA after wave 5 cutover will lead to increased workload for the wave 5 counties and a delay in providing benefit changes for yellow banner cases</p> <p>The CalSAWS and CalWIN teams have been jointly reviewing options to run the 2023 CF COLA, CW MAP Increase, CW IRT Levels batch processes before the wave 5 cutover commences at the end of August 2023. Both systems must be in sync with the COLA values in order to avoid benefit match issues. The ability to update the values and run batch is dependent upon receiving final numbers from FNS and CDSS by August 11, 2023. Both systems are willing to start work based on draft information</p> <ul style="list-style-type: none"> • CDSS has already signaled that they are unlikely to provide final COLA values before September. The following information was provided by CDSS: • The CF and D-CF COLAs will be dependent on USDA FNS' release; we anticipate releasing the COLA letter guidance in 9/2023. We will share COLA totals with CalSAWS as soon as FNS releases those numbers • For MAP, we anticipate a 3.6% increase to the MAP levels. Draft of letter expected Mid-August with posting in September • For IRT, draft letter should be expected around late July with a posting late August/early September <p>Mitigation Plan:</p> <ol style="list-style-type: none"> 1) If the final values are received by 8/11/2023, both CalSAWS and CalWIN will execute their plans to update the values and run batch in both systems prior to the wave 5 cutover. This would be targeted for August 19-20 2) If the final values are not received by 8/11/2023, both CalSAWS and CalWIN will update the values in the systems after wave 5 cutover. CalSAWS will run the COLA for all 55 production counties by 9/10/2023. CalWIN will run the COLA for the three wave 6 counties only. For the wave 5 counties, the COLA will pick up any CW/CF cases that was successfully processed through the benefit match process. For all yellow banner cases, the values will be applied when the county works the case and runs EDBC (October through come up month) to clear the yellow banner 	<p>July 21, 2023:</p> <p>RE: CalFresh – CDSS program notified FNS of the constraints with migration on July 13th. A response is pending</p> <p>RE: CalWORKs: the CalWORKs Maximum Aid Payment (MAP) levels, CDSS is planning on releasing the ACL for stakeholder's review by July 28th and officially releasing it by mid-August</p> <p>CDSS is also working on the increase to the CalWORKs IRT ACL which is dependent on the FNS federal poverty levels that have not been released yet. We have the letter updated and are waiting for the figures and we anticipate releasing the ACL by mid-August</p> <p>July 26, 2023: CalSAWS and CalWIN received the draft CW Map Increase ACL</p> <p>July 27, 2023: CDSS received the following response from FNS. "We have contacted the National Office for an update and will let you know as soon as possible. Several states have been asking for this information and hope to get a response soon"</p> <p>August 3, 2023: CalSAWS and CalWIN received the CF COLA values from CDSS/FNS. SUA, LUA and TUA values are pending. A meeting is scheduled with CDSS for August 8 to discuss pending values</p> <p>August 9, 2023: CDSS provided the SUA, LUA and TUA values. CDSS also confirmed SAWS may move forward with all numbers received to date and they do not anticipate any changes to the values.</p>



Release and Policy Update/Communications

- 2023 CalWORKs MAP/IRT and CalFresh COLA Update
 - Continuous Coverage Unwinding Status
 - Introduction to CFAP/FCED/WDTIP Implementation Efforts
 - BenefitsCal Roadmap and Release Highlights
- 
-

CalSAWS Release and Policy Update

Continuous Coverage Unwinding – DHCS Updates

- Additional request for 1902(e)(14)(a) for medi-Cal members with stable income
- DHCS released a new, interactive [Medi-Cal Continuous Coverage Unwinding Dashboard](#) that includes demographic and geographic breakdowns of the application and renewal processing state-wide.
 - The data dashboard will be published monthly until July 2024.
 - DHCS will provide a brief dashboard overview during the [Keep Your Community Covered Webinar Series](#) on Thursday, August 24, at 11 a.m.
- On July 30, CalHEERS implemented a fix for the “Ineligible” system issue.
 - Additional enhancements to the functionality will be deployed through September 2023.
 - DHCS provided detailed processing instructions to counties during the August 8 county support call.

CalSAWS Release and Policy Update

Continuous Coverage Unwinding – Reporting Updates

- Validating data provided to DHCS via SIRFRAs
 - Held calls with counties on 7/20/2023 and 7/26/2023 to review the DHCS data requests, including the draft output and SQLs
- Understanding what reports are available in CalSAWS
 - Published a guide to MC reports and key DHCS data requests
 - CIT 0183-23 Fact Sheet Medi-Cal Renewal Discontinuances - Overview of discontinuances and subset of MC reports
- System Differences
 - Continue working with migration counties to highlight system differences
 - Continue working with WCDS on renewals impacts associated with waves 4-6. Focused on those months where renewal processing is initiated in CalWIN and renewal processing is completed in CalSAWS
- Enhancements and Defects
 - Prioritizing reports enhancements identified at 7/20/2023 meeting. These will be communicated as part of the Bi-weekly reports call
- On-going Support and Communications
 - Bi-weekly reports call – Even if a help desk has already been submitted, counties are encouraged to bring concerns to this meeting

Release & Policy Update

Committee Enhancement Prioritization

Committee prioritization of enhancement SCRs has been on pause since late 2020 (CIT 246-20). Beginning this fall, the process will restart.

- Internal BA training/planning for restart – July/August 2023
- Beginning in September, prioritization will be added to upcoming committee meetings
 - Up to 5 priorities per committee – may be adjusted over time as there is substantial policy and migration follow-up planned
- This process does not affect BenefitsCal enhancements which utilize the Collaboration Model for prioritizing

Introduction to CFAP/FCED/WDTIP Implementation Efforts

All three efforts:

- Will use the hybrid agile delivery method, like Task Management and Virtual Assistant
- Utilize smaller county groups for CalSAWS SCR design/approval
- CalSAWS work efforts will kick off in Fall 2023

Hybrid Agile Approach

- Workgroup of county representatives is participating in design process.
- Workgroup is providing build approval.
- Applicable committee(s) are informed on the design on a periodic basis.
- Requirements are being broken into smaller SCRs to expedite design approval and allow build to begin while next feature is being designed.
- Any additional enhancements from subsequent reviews will be incorporated into future changes.



Introduction to CFAP/FCED/WDTIP Implementation Efforts

California Food Assistance Program (CFAP) Expansion

This effort will expand CFAP eligibility to noncitizens age 55 and older, regardless of their immigration status.

- Policy Effective Date: October 1, 2025
- Tentative CalSAWS Implementation Date: August 2025
- Recruitment for a small group of county staff to assist with the design and review of the CalSAWS worker-facing changes
 - The CRFI for the recruitment is scheduled to be published in early September 2023
- CalSAWS design work will begin in October 2023

Introduction to CFAP/FCED/WDTIP Implementation Efforts

Foster Care Eligibility Determination (FCED)

FCED is the Eligibility Module for California's Comprehensive Child Welfare Information System (CCWIS) known as the Child Welfare Services-California Automated Response and Engagement System (CWS-CARES).

- Tentative CalSAWS Implementation Date: April 2026
- CalSAWS and CARES are working to develop a project schedule and development approach
- Recruitment for a small group of county staff to assist with the design and review of the CalSAWS worker-facing changes
 - The CRFI for the recruitment is scheduled to be published in August 2023
- CalSAWS design work will begin in September 2023

Introduction to CFAP/FCED/WDTIP Implementation Efforts

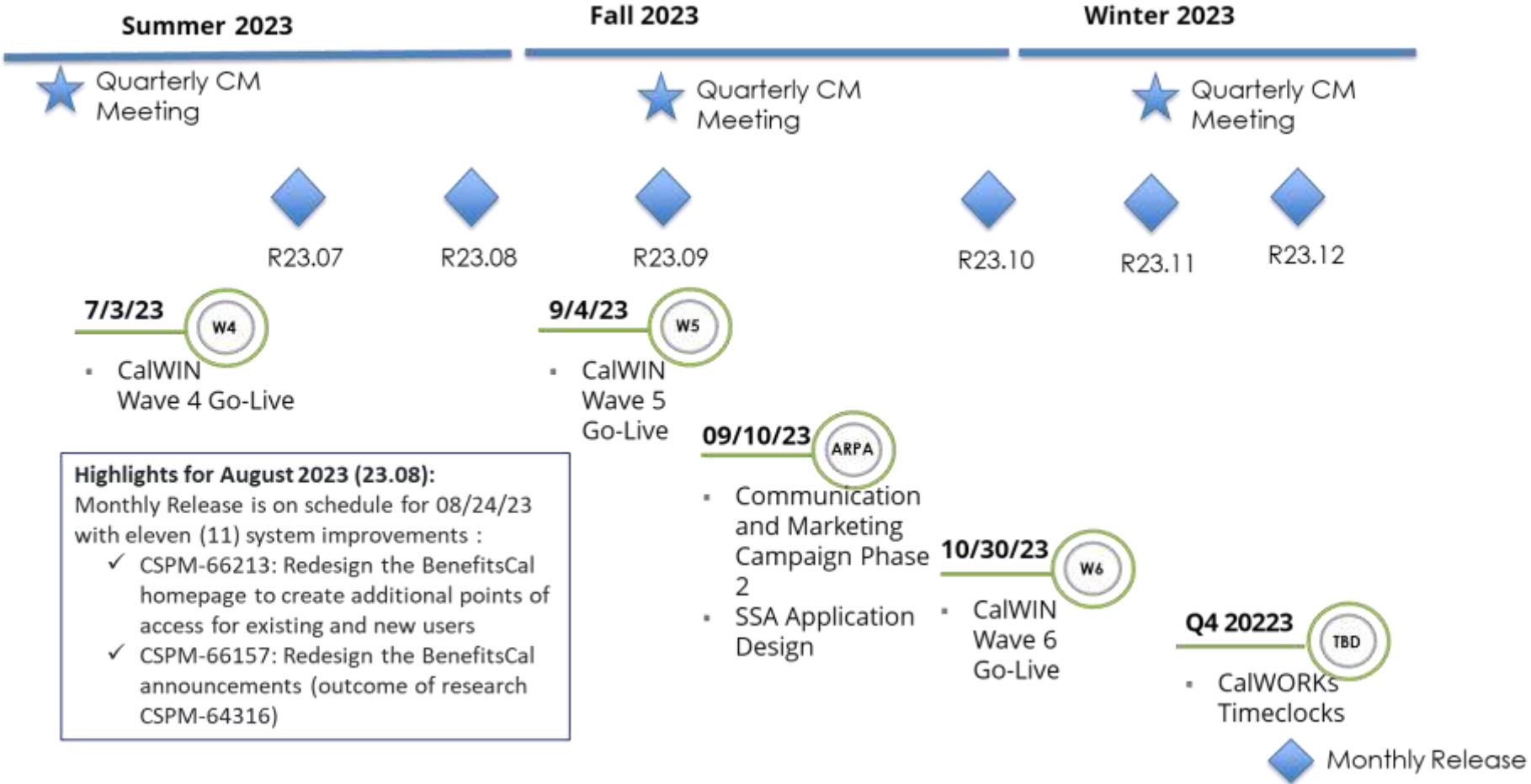
WDTIP Replacement Solution

Welfare Data Tracking Implementation Project (WDTIP) Replacement Solution (WRS) will be developed in CalSAWS. The WRS will maintain and support the CalWORKs 60-month and TANF 60-month time-on-aid (TOA) data currently maintained by the WDTIP/TRAC system.

- Tentative CalSAWS Implementation Date: April 2025
- CalSAWS is working with OSI, CDSS, CWDA, EDD to define requirements
- Recruitment for a small group of county staff to assist with the design and review of the CalSAWS worker-facing changes
 - The CRFI for the recruitment is scheduled to be published in December 2023
- CalSAWS design work will begin in January 2024

BenefitsCal

Upcoming Release Highlights



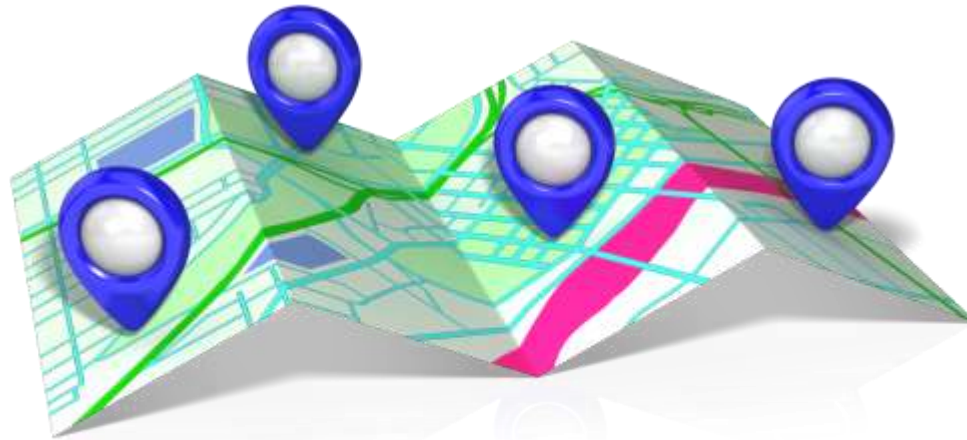


BenefitsCal Update

- ROI Update
 - UCD and Collaboration Model Update
 - Marketing Campaign Phase 2
- 
-

Release of Information Update

BenefitsCal UCD and Collaboration Model Update



BenefitsCal

Collaboration Model Update

In Calendar Year 2023, conducted 3 Collaboration Model Meetings

6

Researched CM Enhancements

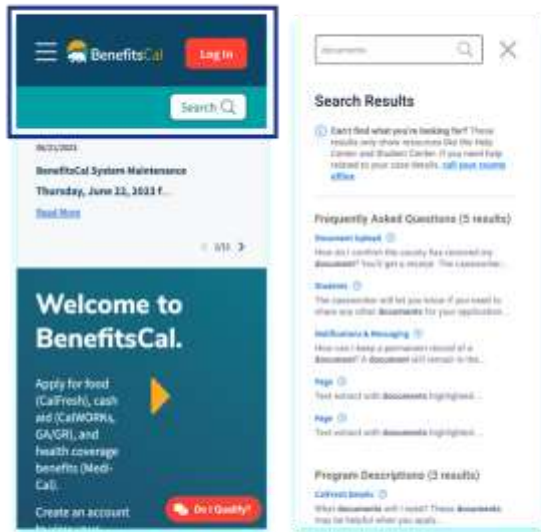
10

Implemented CM Enhancements

12

Implemented Continuous Care Unwinding Enhancements

Global Search (July 2023)



- Allows unauthenticated and authenticated users to search through BenefitsCal help resources
- Displays search results organized by page or section

Homepage & Announcements Improvements (August 2023)



- Redesigned the homepage page to align with key moments of the benefits journey for both customers and CBOs.



- Created a new page when user can view all announcements. Added categories to allow user to browse through different types of announcements.

BenefitsCal

UCD and Stakeholder Engagement Activities

Key

- CM Research
- Other Research
- Completed
- In Progress

Collaboration Model (CM) Prioritized BenefitsCal Enhancements:

- **CSPM-35858:** Program Selection allow user Primary Applications to select no program in the application
- **CSPM-64323:** A public dashboard with metrics
- **CSPM-43163:** Prevent duplicate periodic and annual reports

Other Research Activities:

- **SSA:** Understand the SSA application experience for transition to BenefitsCal.
- **Time Clocks:** Add functionality for customer to review their time on aid and submit request for extensions/exemptions or corrections.
- **CSPM-65808:** Understand the experience of the customers who want to use BenefitsCal but don't use email
- **CSPM-65313:** Enhance chatbot to add FAQs
- **Ongoing CX Monitoring:** Production Observations & Analytics

July 2023

Ongoing CX Monitoring

- ✓ **CSPM-64316 & CSPM-64318:** Homepage and announcement Usability Testing

- ✓ **Customer Focus Groups:** Understand the experience of the customers who want to use BenefitsCal but don't use email.
- ✓ **Time Clocks:** Advocate design review
- ✓ **Time Clocks:** Customer usability testing
- ✓ **CSPM-65313:** Advocate input before designs

Aug. 2023

Ongoing CX Monitoring

- **CSPM-35858:** Non-Needy Caretaker Relative applications user engagement

- ⌚ **CSPM-66332:** Research for Chatbot Expansion
- ✓ **CSPM-65313:** Chatbot usability testing

Sept. 2023

Ongoing CX Monitoring

- **CSPM-64323:** Public Dashboard with Metrics stakeholder engagement
- **Research Collaboration Model Enhancements**

- **CSPM-43163:** Prevent duplicate periodic and annual reports customer engagement

BenefitsCal

Communication and Marketing Campaign Phase 2

Phase 2 of the campaign planning activities started in June 2023

	Campaign #1	Campaign #2	Campaign #3	Campaign #4
AUDIENCE	All Customers	All Customers (via County POCs)	Customers (Email)	Customers (Email)
GOAL	Increase Onsite Awareness & Usage of BenefitsCal	Improve BenefitsCal Adoption	Improve response rates for Renewals and Periodic Reports	Improve response rates for App Completion and Account Creation
APPROACH	<ul style="list-style-type: none">• Trifold Brochure• Promo Cards• Animated Video (mp4 file)	<ul style="list-style-type: none">• Provide digital assets and materials County and CBOs to reach customers across multiple channels	<ul style="list-style-type: none">• Nudge account holders to:<ul style="list-style-type: none">➢ Renew Medi-Cal application after they create an account➢ Complete periodic reports and upload documents and CalFresh Recertification	<ul style="list-style-type: none">• Nudge customers with an incomplete application to complete the application• Nudge customers who submitted a paper application and included email address to create a BenefitsCal account• Customers with upcoming periodic report or renewal, without a BenefitsCal account

Targeted Marketing Campaigns Determined by Stakeholder Priorities



13

Stakeholder Groups Invited to Participate

12

Activities Selected from 4 Campaigns

Participant Segmentation



- Multiple stakeholder groups including Counties, CWDA, CalSAWS Consortium, CDSS, DHCS, and Advocates



Winners!

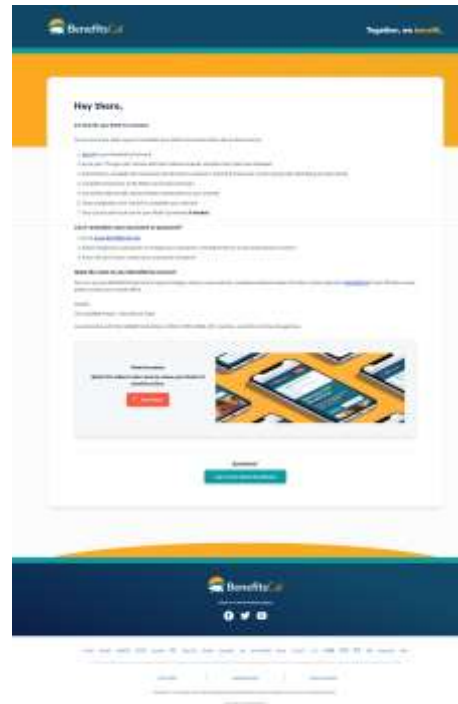
- Trifold Brochure (Digitally Customizable)
- Promo Cards
- Poster
- Direct Mail
- Animated Video
- Fact Sheet
- 6 Emails

BenefitsCal

Communication and Marketing Campaign Phase 2

■ Animated Video

- 20 BenefitsCal Languages
- Closed Captioning
- Posted on Marketing Site, Advocate Site, and YouTube



6 Emails:

- 20 threshold languages
- Emails sent to all BenefitsCal counties unless opted out
- Customers segmented based on key actions
- Each customer receives one email
- Emails distributed from 8/28 - 9/4/2023

BenefitsCal

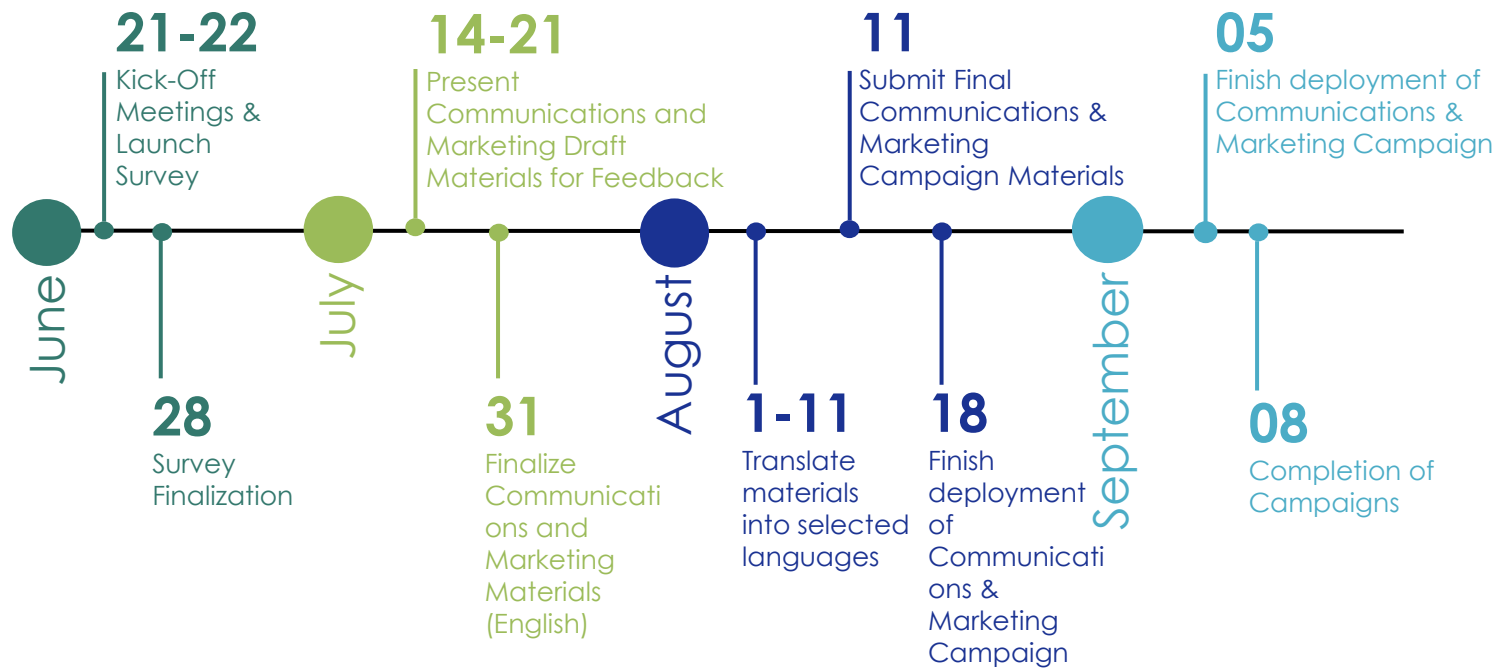
Communication and Marketing Campaign Phase 2

BenefitsCal Promo Cards, Customizable Brochure and Letter, Awareness Toolkits Fact Sheet & Poster



BenefitsCal

Communication and Marketing Campaign Phase 2 Timeline





Return Mail

Central Print Return Mail

Background

Return Mail Service has options

- Return mail is either undeliverable (no such location, not accepted, etc.) or a piece with an incorrect address where forwarding is not desired
- CalSAWS choice is to **not forward** mail due to policy interpretation and County preference
- Undeliverable mail and mail with a forwarding address on file is returned to the County

USPS Terms

- **Coding Accuracy Support System (CASS)** – USPS service that returns a properly formatted address or notification of not deliverable
- **National Change of Address (NCOA)** – USPS service that returns the data for a name/address that has a change of address on file prior to mailing (intended to replace ACS)



Central Print Return Mail

Background



Address Verification

- Performed in CalSAWS at the time the address is entered (not at the time of mailing of the correspondence)

Interface Address Verification

- Not performed if the address arrives via an interface

USPS Verifications

- CASS is not performed
- NCOA is not performed

Mailed

- All pieces are mailed
- Those which are undeliverable or have a forwarding address on file are returned as a physical mail piece (with the USPS yellow sticker) to the return address (County)

Central Print Return Mail

Objective

Provide information faster regarding mail that will not be delivered

Better Client Service

By resending the correspondence in a timely manner to a correct address

Reduce Expense

By preventing additional undeliverable mailings (envelopes, paper, postage)

Reduce County Return Mail Workload

By minimizing the number of return envelopes that have to be opened and processed

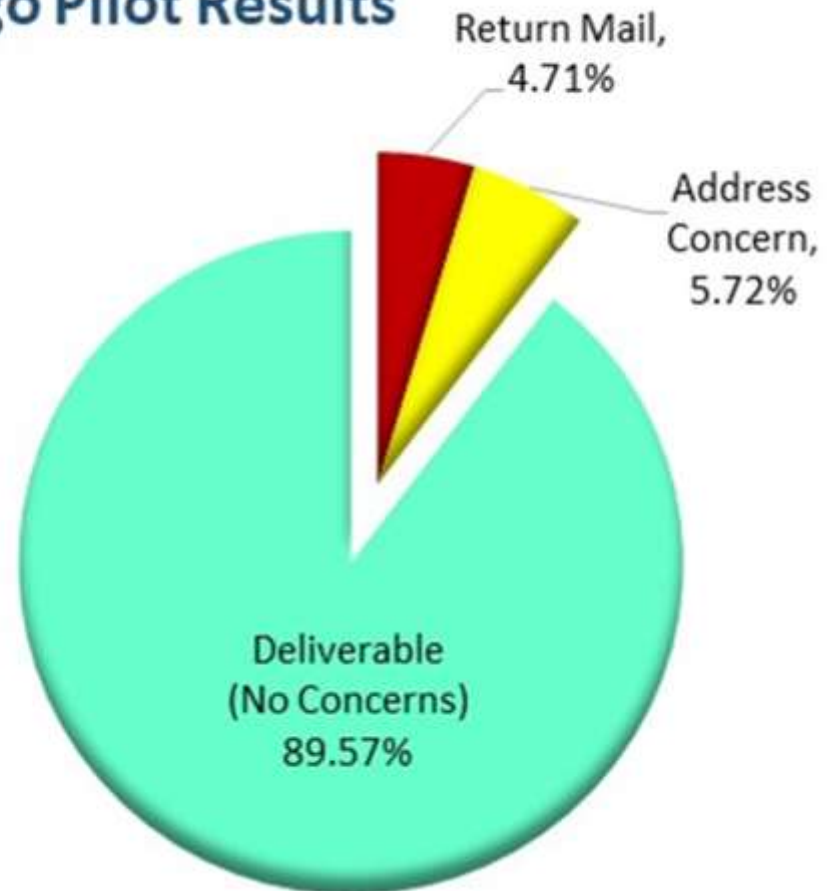
Central Print Return Mail

Pilot Results

- San Diego piloted the Return Mail service starting July 5, 2023

- ✓ 20 days of Central Print mailings
- ✓ 206,159 envelopes mailed
- ✓ 9,715 envelopes undeliverable based on the USPS electronic results
- ✓ 11,791 envelopes have address problems -- some may cause them to become undeliverable in the future

San Diego Pilot Results



Central Print Return Mail

Solution Options

- Central Print can process both CASS and NCOA for all mail
- Based on results of CASS and NCOA, mail can be identified as deliverable or return mail at the time of mailing
- **Deliverable Mail with No Address Concerns**
 - Mail piece is put into the USPS mail stream



Central Print Return Mail

Solution Options

- **Return mail** (those identified as return mail with an authoritative electronic result from USPS) are:

Mailed

- CASS or NCOA provides the recipient and address information along with the official notification from USPS (not deliverable, change of address, etc.).

Notification of Results

- Report is provided to the County of the undeliverable mail
 - *OPTION* - Task can be created within CalSAWS for undeliverable mail

Physical Mail Piece

- USPS returns the mail piece but it can be immediately destroyed
- Physical mail piece is returned to the County return address
 - *OPTION* – Physical mail piece can be returned to Central Print

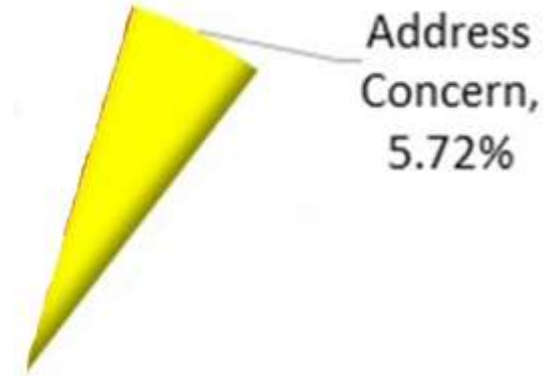
Return Mail,
4.71%



Central Print Return Mail

Solution Options

- **Address Concern** (those identified as deliverable but with USPS recommended address corrections) are:



Mailed

- CASS providing the recipient address information along with the official notification from USPS

Notification of Results

- Report is provided to the County of the mail with address concerns
 - *OPTION* - Task can be created within CalSAWS for mail with address concerns

Central Print Return Mail

Next Steps

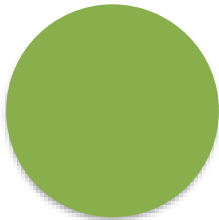
- **For More Information on Return Mail Options or the County Purchase Process**
 - Contact your Regional Manager to set up a meeting with Central Print





Quarterly Statistics

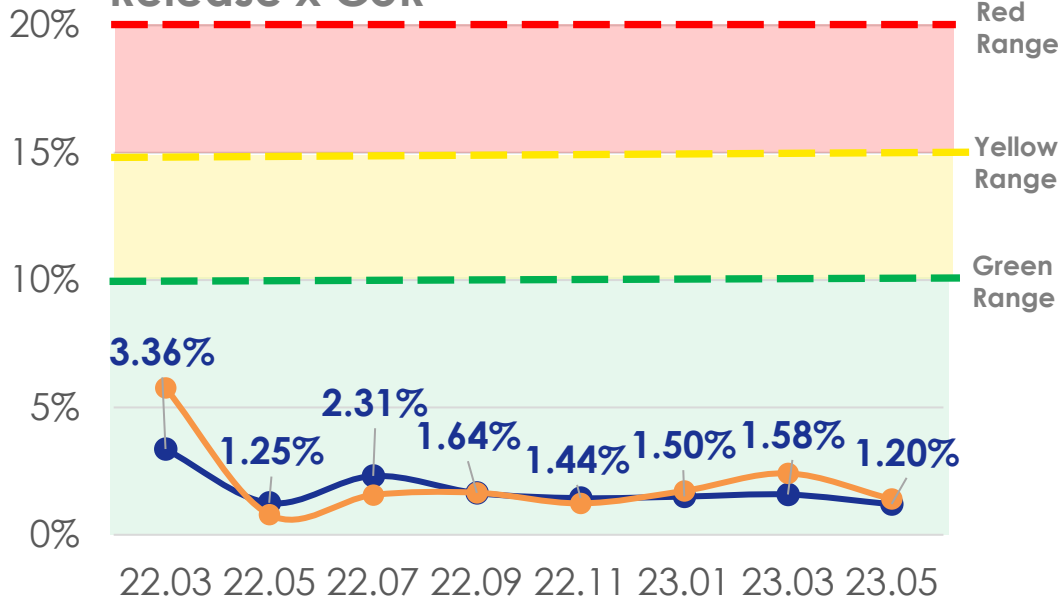
- SLAs, Production Stability, Tickets, and Defects
 - Onshore vs. Offshore
- Hyland Imaging SLAs



CalSAWS Quality, Defect, Stability, Tickets Stats

CalSAWS Application Release Quality Metrics

Release x CoR



Amendment 29 went into effect March 2022

Legend: ■ Onshore + Offshore ■ Offshore

TYPICAL RANGES

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

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

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

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

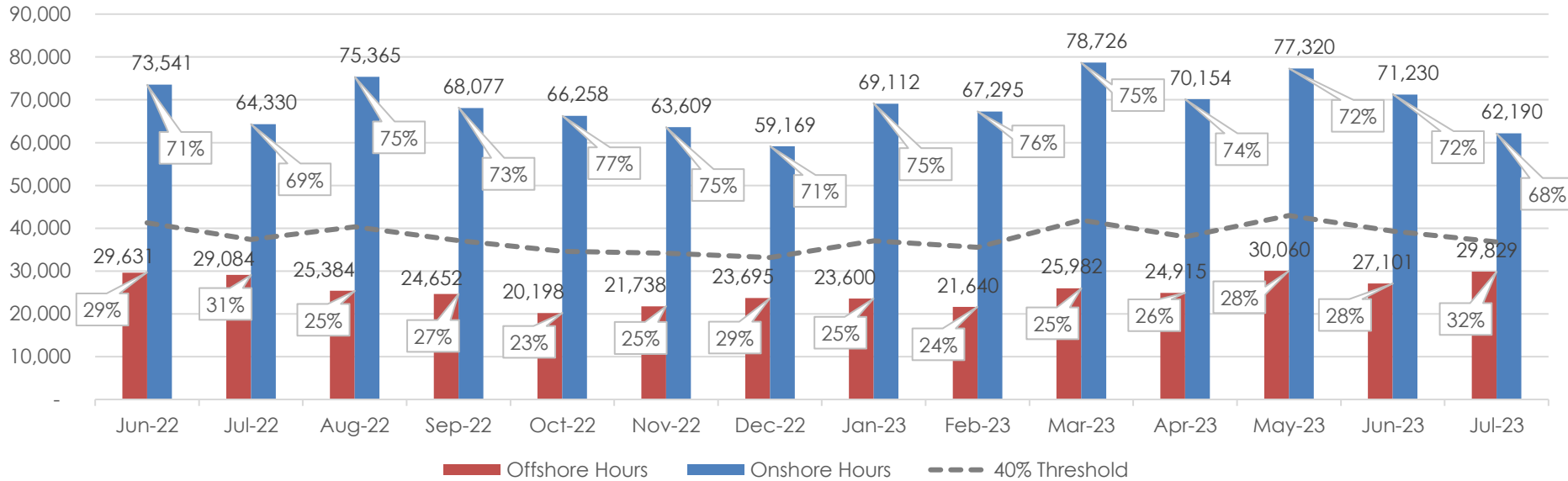
The CoR line graph may increase for the releases if additional defects are found in the future

New releases are added after the next release Go-Live and an analysis can be conducted on the previous release. For example, 23.07 COR numbers will be available after 23.09 goes live

CalSAWS Quality, Defect, Stability, Tickets Stats

GDN Workload Balance

Onshore vs. Offshore (GDN) Hours Across All Teams



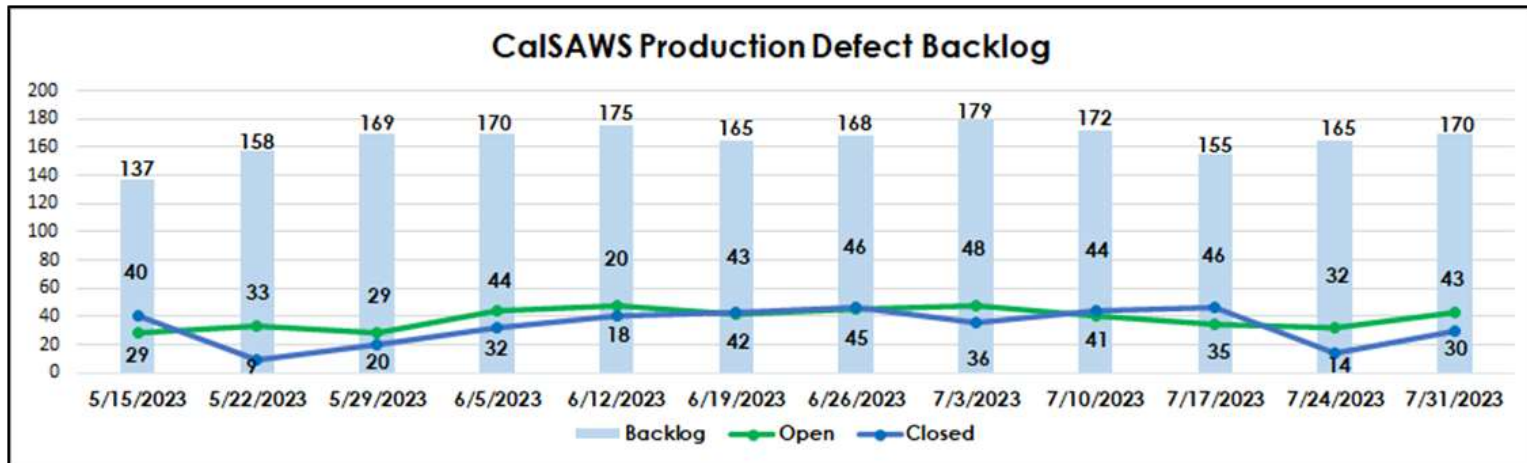
Per Amendment 29: “Use of GDN resources may approximate 40% of the available hours required for Accenture to deliver its obligations under Exhibit X CalSAWS M&O Extension”

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



CalSAWS Quality, Defect, Stability, Tickets Stats

Production SLA Metrics

Perf Req #	LD Applies	Performance Requirement Title	Feb	Mar	Apr	May	June	July *
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	✓	✓	✓	✓	✓	✓

- June misses on Daily Peak Availability, Daily Prime Availability, and Training Environment Availability were all due to the same two events, one on June 7, 2023, one on June 20, 2023
- June miss on Monthly Helpdesk Diagnosis Time was due to due to CHG0040848, which was created to auto resolve tickets linked to SCRs. All Problems linked to SCRs were automatically resolved on June 2, 2023, and 71 out of 79 were from backlog (created between September 2021 through April 2022 and had breached SLA prior to being associated to SCRs)

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

* July SLAs are preliminary pending the regularly monthly review meeting



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

JULY 2023 UPTIME



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
Less than 99.00%	20% of the Monthly SaaS Fees
July Actual Uptime	100%
July Service Level Credit	\$0.00

Hyland

CalSAWS Quality, Defect, Stability, Tickets Stats

Hyland Imaging Performance Metrics

JULY 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

July Actual Monthly Page View Percentage

98.83%

July Service Level Credit

\$0.00

Hyland

CalSAWS Quality, Defect, Stability, Tickets Stats

Hyland Imaging Performance Metrics

JULY 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

July Actual Database Transaction Percentage **99.94%**

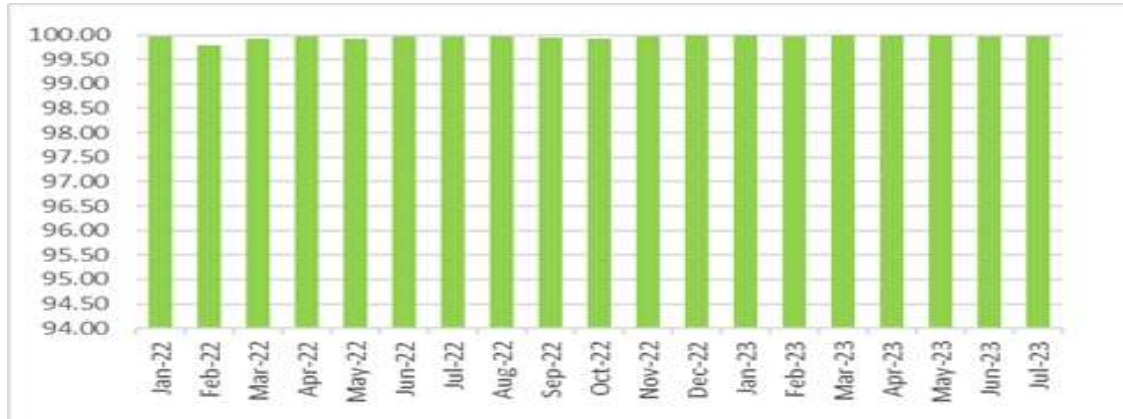
July Service Level Credit **\$0.00**

Hyland

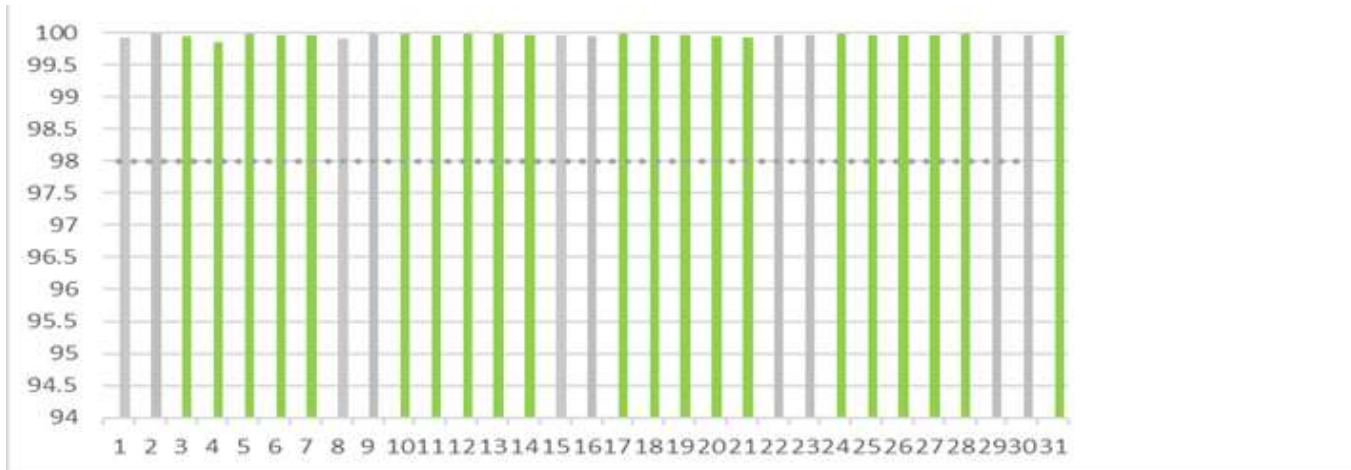
BenefitsCal Performance Metrics

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 – July 2023



Daily View: July 2023

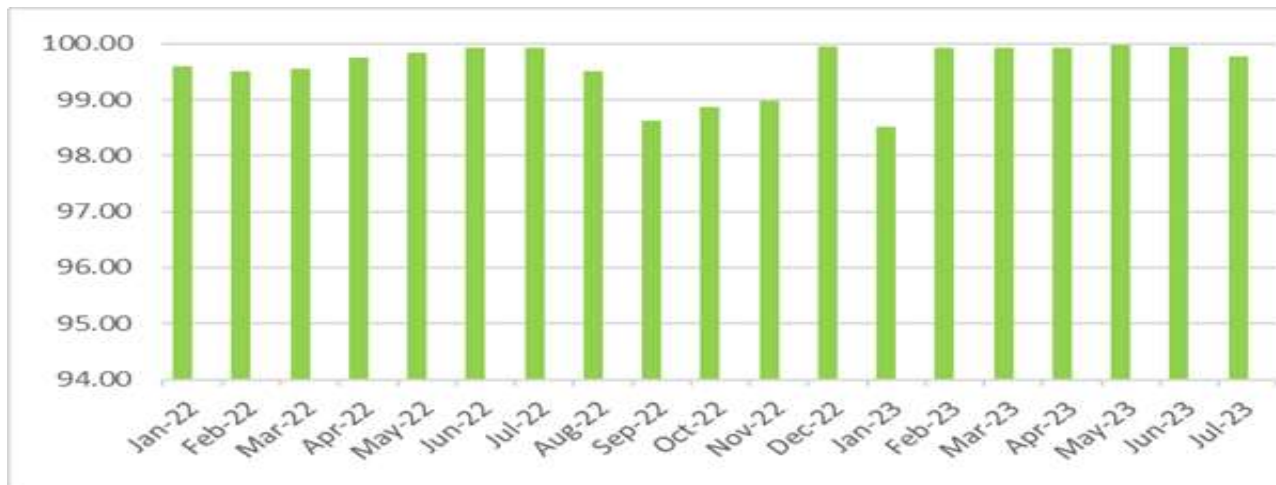


Legend: ■ Target Met ■ Target Not Met ■ Weekend

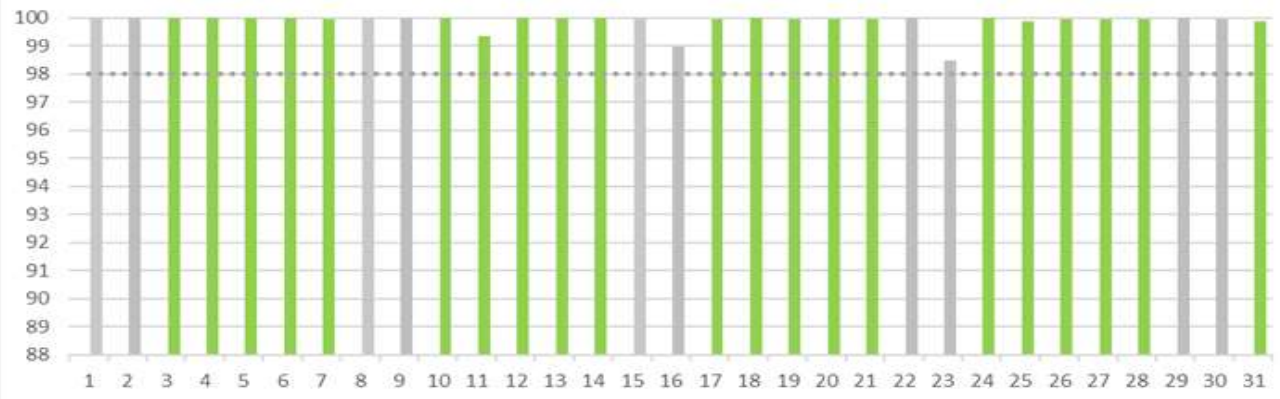
BenefitsCal Performance Metrics

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 – July 2023



Daily View: July 2023

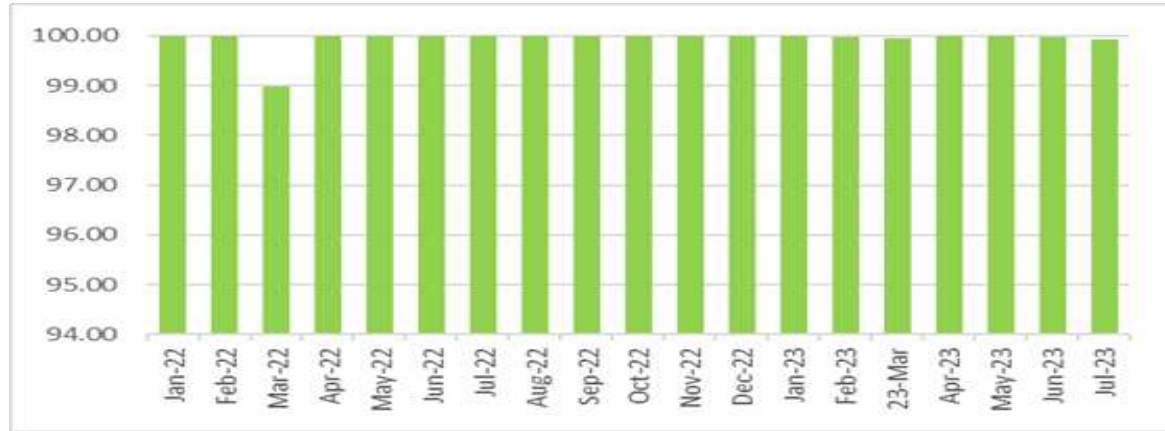


Legend: Target Met Target Not Met Weekend

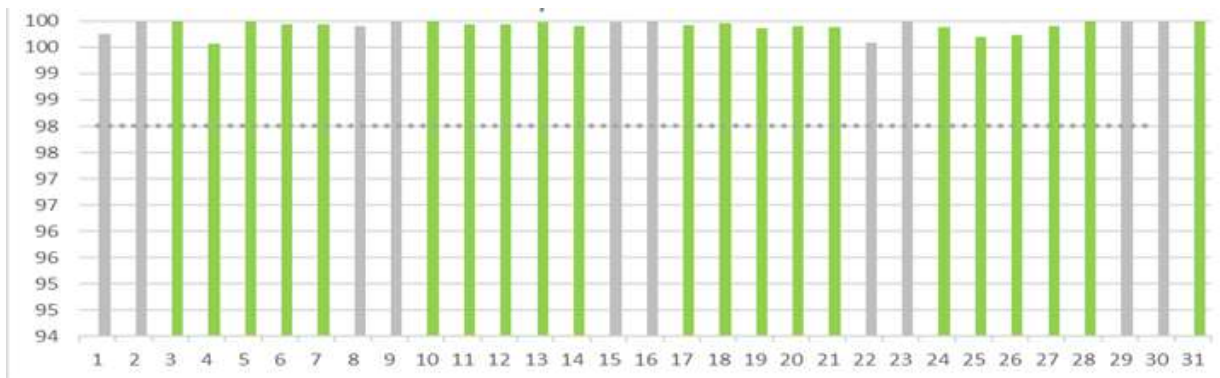
BenefitsCal Performance Metrics

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 – July 2023



Daily View: July 2023

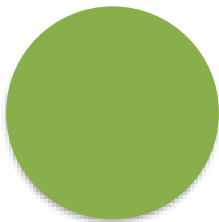


Legend: ■ Target Met ■ Target Not Met ■ Weekend



Contact Center Update

- Status of eCCP Rollout to former C-IV Counties



eCCP Migration Plan – Former C-IV Counties

Upcoming Activities – Enhanced Call Control Panel (eCCP)

- Working with individual counties to confirm go-live dates
- Counties training staff using exiting WBTs and training resources (videos, quick guides and fact sheets)

Phase	Counties	Target Go-Live	Status
Phase 1	San Joaquin Merced	5/12/2023	Complete
Phase 2	Butte Sutter Marin	8/16/2023	In Progress
Phase 3	Kern Kings Stanislaus Riverside	9/22/2023	Pending
Phase 4	Yuba Monterey Humboldt San Bernardino*	12/15/2023	Pending

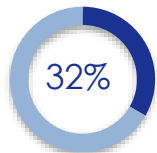
*Move to new AWS account

Voice Bots County Roll-Out Plan

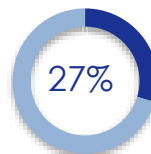
Voice Bots	Counties	Target Go Live	Status
Sprint 1	San Bernardino	5/29/23	Complete
Sprint 2	Yolo, Placer, Shasta	7/13/23 (Shasta) 7/31/23 (Yolo, Placer)	Complete
Sprint 3	Contra Costa, Santa Clara, Tulare, Orange, Ventura, Santa Barbara	8/4/23	Complete
Sprint 4	Butte, Marin, Solano, San Diego, Santa Cruz, San Mateo, Sutter	8/18/23	Test Complete
Sprint 5	Fresno, Sonoma, Alameda, Stanislaus, Kings, Kern, Riverside, Los Angeles Model Office	9/22/23 (LA) 9/29/23	Test In Progress
Sprint 6A	San Francisco, Sacramento, San Luis Obispo	TBD	Not Started
Sprint 6B	Yuba, Monterey, Humboldt, Non-CSC	TBD	Not Started

All County Data

Increase in Customer Auth Rate



Proactive Customer Data Push



Benefits

Auth Rate:

- Reduction in handle time
- Improved customer service
 - Increased access to self-service

Push Notifications:

- Reduction in request to speak to agent



Procurement Updates

- M&O Procurement
 - 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 Infrastructure BAFO #1 Instructions	July 18, 2023
12	Issue M&E BAFO #1 Instructions	August 11, 2023
13	Best and Final Offer #1 Due Date	August 29, 2023
14	Evaluate Infrastructure and M&E BAFO #1 Business and Price Proposals	August 30 – October 27, 2023
15	Evaluate Consolidated Price Proposals	October 18 – 27, 2023
16	Conduct Agreement Exception Discussions	October 10 – 13, 2023
17	Issue Price BAFO #2 Instructions	November 3, 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



Update on Key QA Activities

Quality Assurance Team

QA Functional/Test, Technical, Migration Highlights

QA Independent Test Results

Release	# SCRs Reviewed	# SCRs Tested	# Scenarios Passed	Total Defects Found
CalSAWS 23.07	8	9	251/251	7
BenefitsCal 23.08.24	4	3	Ad hoc	1
CalSAWS 23.09	5	10	70/302	In Progress
Total	17	22	321	7

QA Technical Reviews

21 CalSAWS SLAs Reviewed	3 Hyland SLAs In Review	0 System-wide Impacts	29 CC/Lobby Management Scripts Reviewed
------------------------------------	-----------------------------------	---------------------------------	---

QA Migration Reviews

10 Retrospectives Completed	934 Requirements	10 Implementation Support Staff	48 CDV Testers Supported
---------------------------------------	----------------------------	---	------------------------------------

Functional/Test Highlights

23.07 CalSAWS Complete
 23.08.24 BenefitsCal In Progress
 23.09 CalSAWS In Progress
 CFAP/FCED/WDTIP/ROI

Technical Highlights

Service Level Agreements(SLA)
 System Security Plan(SSP) Reviews
 Contact Center(CC), Lobby Management, and Imaging Migration

Migration Highlights

Wave 4 Retrospectives Completed
 Wave 5 Implementation Staff Support
 Wave 6 County Data Validation(CDV)



Update on Key State IV&V Activities

Independent Validation & Verification (IV&V)

Key Activities



CalSAWS and BenefitsCal Releases

- CalSAWS Release 23.07 Post Implementation, 23.09 Testing
- BenefitsCal Monthly Release Development and Testing, UCD, ROI Workgroup Meeting



Performance

- Imaging: Production defect resolution and enhancements
- Batch: Performance improvements and time savings



CalWIN Data Conversion

- Wave 5 and 6 Mock Conversion
- Triage and Resolution of open Conversion Defects
- Mitigation actions and improvements for the upcoming conversion cutovers



CalWIN Implementation

- Wave 4 Post Implementation Support
- Wave 5 and 6 Implementation Readiness



State Partners Updates

- OTSI
 - CDSS
 - DHCS
- 
-



Regional Updates



Adjourn Meeting