CalSAWS | JPA Board of Directors Meeting



Agenda

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

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

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

4. Approval of FCED Governance Member.

5. Approval of Gainwell Central Print Amendment 2, which includes additional print services, facility management services, addition of county purchase and premise allowance, and administrative updates.

Gainwell Amendment 2

Summary of Changes

Expanded Print Services

As part of the CalSAWS January 2023 As-Needed IAPDU, the Consortium identified additional print needs, which must now be accounted.

Project Facility

The existing CalSAWS facility leases will conclude by the end of 2023; however, the Consortium must maintain facility space to support ongoing application and infrastructure activities beyond 2023. For the Northern California location, the Consortium determined that an extension of a subset of its CalWIN office located in Roseville was the most viable and cost-effective option. The facility management services are included in this amendment for the period January 2024 through the base contract term of February 2026 (26 months). The costs are accounted for in the CalSAWS IAPDU.

Change Notice Allowance for Premise and County Purchases

This allowance enables the Consortium to accommodate various premise (policy) or other changes, as well as special print jobs identified by the counties. The costs will be accounted for in future premise and county APDs.

Administrative

The Agreement included options for both Contra Costa and Tulare County to utilize the CalSAWS Central Print Services. The Consortium has exercised these options and has consolidated the price schedules and memorialized the approvals as part of this amendment. This update has no impact on the TCV.

The Consortium and Gainwell also refined and clarified language in order to more efficiently enforce the Service Level Agreements (SLAs) as part of the Maintenance & Operations (M&O) Deliverable. The updates must now be included in Exhibit H – Service Level Agreement (previously RFP Attachment I). This update has no impact on the TCV.

Gainwell Amendment 2

Summary of Changes

Amendment 2, Paragraph 5 Section 7.1 Total Maximum Contract Sum	As of Amendment 2
Total	\$241,409,247
Contract Sum for the Print Services Implementation Deliverables	\$979,185
Contract Sum for the Initial M&O Services through November 2023	\$25,650,515
Contract Sum for M&O Services from December 2023 through February 2026	\$65,057,204
Contract Sum for the five optional yearly M&O Services	\$105,265,602
Contract Sum for Print Services Change	\$32,100,000
Contract Sum for Print Services County Purchases	\$9,000,000
Contract Sum for Facility Management Fee	\$3,356,741
Contract Sum for Optional Printing/Mailing through November 2023	\$0

As of Amendment 1
\$164,649,279
\$979,185
\$19,240,702
\$37,902,651
\$105,265,602
\$0
\$0
\$0
\$1,261,139

1	Difference
9	\$76,759,968
5	\$0
2	\$6,409,813
1	\$27,154,553
2	\$0
0	\$32,100,000
0	\$9,000,000
0	\$3,356,741
9	(\$1,261,139)

6. Approval of Consent Items

- a. Approval of the Minutes and review of the Action Items from the August 25, 2023, JPA Board of Directors Meeting.
- b. Approval of the Agreement between the CalSAWS Consortium and Eide Bailly, which includes services to perform the annual financial and single audits of CalSAWS.
- c. Approval of Accenture Change Notice 28, which includes a request to add four (4) premise items, including Reimbursement for Food Benefit Theft Automation, Stage One Continuous Eligibility Automation, Work Registration CalFresh Disqualification Notice Update, CARES Development Environment, and five (5) county purchases. Also included are administrative adjustments related to additional hours for Application Development Facility (ADF) Migration and Roseville Network build out offset by reduced WAN costs, and payment month shifts.
- d. Approval of ClearBest Change Order 7, Work Order 4, which includes quality assurance services related to Maintenance and Operations (M&O) for the period November 1, 2023, to January 31, 2024, to align to the base contract term.
- e. Approval of ClearBest Change Order 7, Work Order 5, which includes which includes a request to add three (3) premise items Reimbursement for Food Benefit Theft Automation, Stage One Continuous Eligibility Automation, Work Registration CalFresh Disqualification Notice Update.
- f. Approval of Deloitte CalWIN ISS Change Order 4, which includes additional post implementation support hours offset by a reduction in training facilities, administrative adjustments related to payment month, and two (2) County Purchases.

Informational Items

Wave 5 Go Live Debrief

Wave 5B Cutover

Description of Issue Encountered

- During execution of the conversion process, the team identified an issue that omitted 500k Applications, IEVS, Child Support and Non-compliance records
- The team corrected the root cause and restarted the conversion process. The omitted records were successfully pulled into the 2nd run of the conversion process.
- The root cause for the omitted records was traced to an SCR (System Change Request) that failed to update the CalSAWS Default Position data for Wave 5 counties on August 24th.
- Additional controls and validation checks have been added to the Wave 6 conversion events to prevent reoccurrence.

Wave 5B Cutover

Quality Assurance/Conversion Team Checks

QA Checks (Wave 1B-5B Cutovers)	QA Checks <u>Enhanced for Wave 6B</u>				
Pre-Conversion					
Project plan table reads ✓ Review tasks and confirm owners	Project plan table reads ✓ Review tasks and confirm owners				
Preflight checklist ✓ Review Conversion Code, Source data, Communications, and Milestones	 Preflight checklist ✓ Review Conversion Code, Source data, Communications and Milestones □ Earlier deployment and validation of default worker assignment □ Over the shoulder Production validations of code and production data □ Expanded analysis for W6 of any other SCRs that impact conversion 				
During Conversion					
Tier Reviews ✓ Validate tables and row counts	Tier Reviews ✓ Validate tables and row counts				
 Stage Gate Reviews ✓ Review data after it is transformed to people, applications, (open, closed, pending) cases, recovery accounts, appointments, placements, sanctions and shell cases 	 Stage Gate Reviews ✓ Review data after it is transformed to people, applications, (open, closed, pending) cases, recovery accounts, appointments, placements, sanctions and shell cases 				

Wave 5B Cutover Fresno Image Migration

- Fresno identified an issue unique to their county's image export tool that resulted in a subset of documents missing pages.
- Scope of impacted documents was identified to be
 4.6 million out of 25 million total documents.
- Fresno county continues to have access to all pages of impacted documents through their legacy imaging system.
- Project team has escalated the effort of reimporting county documents with imaging vendor and is projected to complete prior to start of business Monday September 25th.

Wave 5B Cutover Update

Congratulations Alameda, Fresno, and Sonoma

- Wave 5B cutover finished in 109 hours with the System coming up Tuesday 9/4 @ 6:24AM
 - 989K cases converted
 - 2.66 million Persons/Recipients
 - 4,501County Users added
 - 4.19 billion rows added to the CalSAWS database
- Contact Center and Imaging solutions went live at the same time.

Wave 5 CalSAWS Update

Post 5B Highlights

- All systems have been stable and have achieved a new record with 25,666 county workers simultaneously logged in and working across the 55 production counties.
- Nightly batch for the 55 production counties continues to complete before 6am.
- Online performance SLAs continue to be met.

Wave 5 BenefitsCal Update

BenefitsCal usage for Wave 5 counties since rollout on September 5, 2023.

6,522
Applications Submitted

48,918

Documents Uploaded

1,340
Changes Reported

31,520
Customer Accounts Linked

29 /
Renewals Submitted

437
Periodic Reports
Completed

609
CBO Accounts Converted

*Metrics collected from 09/05/23 to 09/10/23

Post Implementation Support

Assisting the Wave 5 Counties through 11/3/23

- Hearing from our Wave 4 Counties
- Post Implementation Support is going strong!
 - 159 CalSAWS County staff are supporting Wave 4 Counties!
 - 310 total volunteers from the CalSAWS Counties and Project providing support throughout migration period
- Approximately 400 virtual interactions recorded in the first five days of go-live

Wave 4 Retrospectives



CalSAWS Migration Retrospective Approach



Project Team Sessions

Focus on internal observations and enhancement opportunities.



County Sessions

Capture input directly from counties based on their migration experience.



Wave 4 – Focus & Action





Focus

- · What Worked
- Opportunities for Improvement
- Recommended Action



Action

- Realtime Adjustments
- Adjustments in Progress

Session Topics:

- ISS Implementation (Pre and Post)
- Organizational Change Management
- Training
- TOSS/Support Teams

- Contact Center
- Imaging
- Lobby Management
- BenefitsCal Communication & Resources
- County Data Validation
- Conversion

Themes & Changes

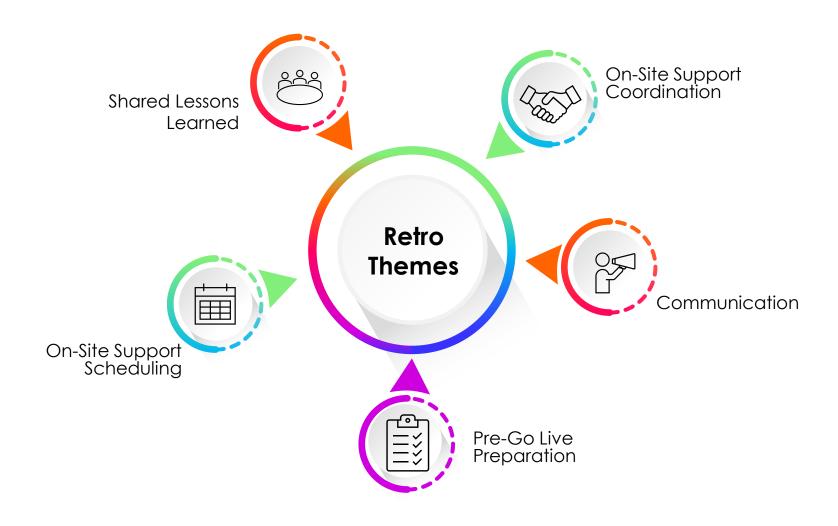
Today, we will cover:

- 1. Retrospective themes from teams on opportunities for improvement.
- 2. Changes that counties will see from what we learned with Wave 4.



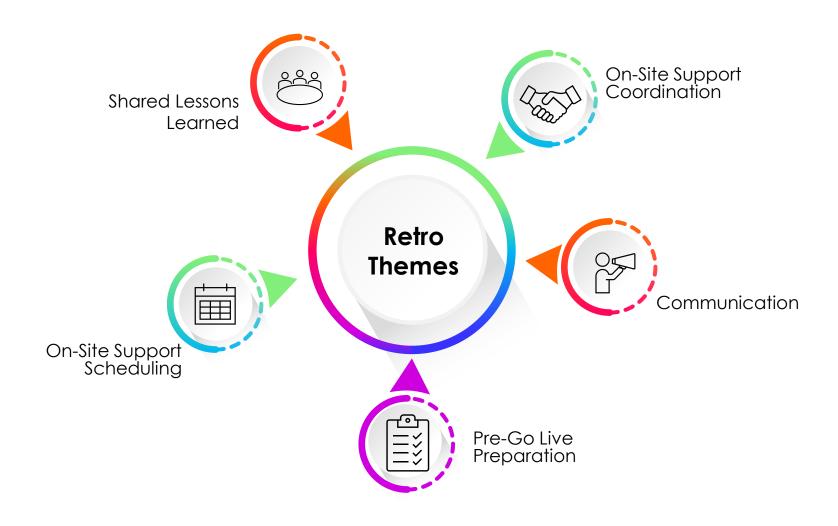
OCM, Training & Implementation Retrospectives

Opportunities for Improvement – Themes



OCM, Training & Implementation Retrospectives

Opportunities for Improvement – Themes



OCM, Training & Implementation - Changes for Future Waves

TOOLS



OCM

Proactively forecast resource needs to prevent potential service gaps for OCM support in future waves

Training

Wave 4's higher staffing needs are not an element in future wave planning; Wave 5 and 6 have regular staffing needs

Implementation

Reinforce messaging to support volunteers and project staff on steps required to adjust onsite scheduling reflected on the on- site tracker

PROCESSES



OCM

Proactively support improved preparation and County communication for Pre-Go
Live activities.

Evaluating OCM on site support resources and scheduling to maximize benefits to Counties in future waves.

Implementation

Continue to refine methods for onsite support coordination across the project and with county partners.

Further partnership with Regional Managers to support counties through pre-go-live support activities.

COMMUNICATION



OCM

Incorporate readiness
touchpoint into standing IPOC
meetings to leverage an existing
forum to increase awareness
and support County preparation
for readiness activities.

Continue to share information from prior waves on lessons learned to support subsequent wave preparation and execution.

Training

Continue to share lessons learned from prior waves with upcoming waves

Implementation

Further refined County prep debrief format to streamline structure and increase benefit to the counties.

Contact Center, Imaging & Lobby Management Retrospectives

Opportunities for Improvement – Themes



Contact Center, Imaging & Lobby Management - Future Wave Changes

TOOLS



Imaging

Continuing to refine the Imaging on site/virtual support model and scheduling to position the team to provide the highest value to participating Counties.

Lobby Management

Kiosk management plan is being evolved to incorporate a long-term management plan to include managed and unmanaged Counties for automation of kiosk management.

PROCESSES



Contact Center

Continue to promote the value of expanding access within the Counties to virtual support.

Imaging

Proactively gathering County information on where to find local resources to improve experience during on-site support.

Lobby Management

Evolving the County Go Live checklist, based on observations and lessons learned, to further support preparation and county readiness.

COMMUNICATION



Contact Center

Continue to share Lessons Learned for developing phone call test scripts to include multiple scenarios.

Imaging

BPR session updated to include information on "One Touch" design and adjustments considerations.

Incorporated imaging reports overview into the Imaging precut over session to promote awareness.

County Data Validation (CDV) & Conversion Retrospective

Opportunities for Improvement – Themes



CDV & Conversion - Future Wave Changes

TOOLS



CDV

Case Review scripts have been updated.

Training tips and recordings have been updated to include validation using the script, logging a finding and Masking data.

Enhanced education on identifying cases (Constant not Masked)

Conversion

CRFI evolved to clearly communicate the window where county resources are needed to participate in clickthrough activities.

PROCESSES



CDV

Kickoff meetings have been enhanced to include live demonstrations and walkthroughs.

Enhanced user access to all cases, not just those within caseload.

Conversion

Implemented pre-flight check list meeting to walk through conversion code validation.

Data Change Requests (DCRs) applied resulted in reduced yellow banner cases.

COMMUNICATION



CDV

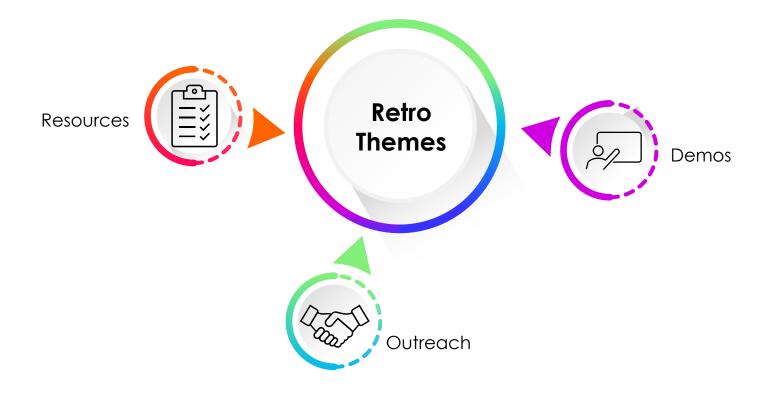
The Mapping Transformation report has been distributed with a highlight on "What You Need to Know".

Conversion

Additional weekend touch points, with county clickthrough participants, to communicate changes in schedule.

BenefitsCal Retrospective

Opportunities for Improvement – Themes



BenefitsCal – Future Wave Changes

TOOLS



BenefitsCal

Continually improving the Go Live readiness check list based on observations from prior waves.

PROCESSES



BenefitsCal

Partnering with counties to identify lobbies with the highest traffic to provide on site demos to support client access.

COMMUNICATION



BenefitsCal

Continue client outreach efforts to support BenefitsCal awareness and improved access to services.

Future Wave Readiness

- Wave 6 Readiness
- Wave 6 Risk Summary

Overall CalSAWS Readiness: Wave 6

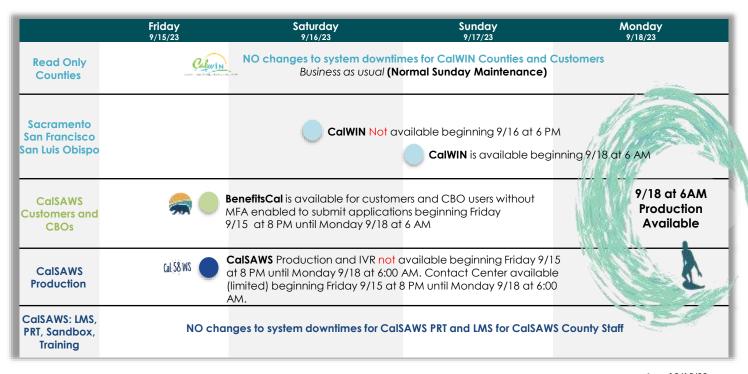
Readiness Areas and Categories as of 9/11/2023.

Readiness Area	Readiness Category	CalSAWS (9/11/23)
	Deploy CalSAWS Releases 23.09	On Schedule
	Contact Center Readiness	On Schedule
Application	Imaging Readiness	Watch Item
	BenefitsCal Readiness	On Schedule
	Central Print Readiness	On Schedule
	County Interface Partner Test (IPT)Execution	Watch Item
Integration	State Interface Partner Test (IPT) Execution	Complete
Conversion &	Defect Resolution	On Schedule
CalWIN	EDBC Match – Auto Review Rates	On Schedule
	Mock Cutover	On Schedule
Migration	Cutover Window	On Schedule
Tooknigal	County Network Connectivity	Complete
Technical	Performance Testing	On Schedule
Training	WBT Training Delivery	On Schedule
Training	ILT Training Delivery	On Schedule
	Change Discussion Guides (CDGs)	Complete
	Communications	On Schedule
Organization	Business Process Reengineering	Complete
	Configuration	Complete
	Process Simulation	On Schedule
	Implementation Planning	On Schedule
	County Prep	On Schedule
Implementation	Pre and Post Implementation Support	On Schedule
	Help Desk	On Schedule
	County Ad Hoc Reports/APIs	Watch Item

*The status should be reflective of the readiness category trending at the time of reporting period.

Wave 5C/6A Cutover Weekend Calendar

Wave 5C/6A (County Prep Cutover)



*as of 8/15/23



Wave 6: 6B Cutover Weekend Calendar

Go-Live Event Cutover: System Down Time Calendar*

	Thursday 10/26/23	Friday 10/27/23	Saturday 10/28/23	Sunday 10/29/23	Monday 10/30/23
Sacramento, San Luis Obispo, San Francisco Customers	My BCW N	ot available beginning 10/26 at 5 sh until Monday 10/30 by 6:00 AM	:00 PM. Apply for Medi-Cal	on <u>Covered CA</u> and CalFresl	-
Sacramento, San Luis Obispo, San Francisco Staff	MyBCW CalWIN	Remains available from 10/26 5:0 Not available beginning 10/26 at ot available beginning 10/26 at 6	6:00 PM	to register applications from	10/30 by 6:00 AM Production Available
CalSAWS Customers and CBOs		awithout MFA en	only beginning 10/27 at 6 A vailable for customers and 6 abled to submit applicatio 8:00 PM until Monday, 10/3	CBO users ns beginning 0 by 6:00 AM Benefit Monda until M AM to	omes sCal Not available by 10/30 at 3:00 AM onday 10/30 by 6:00 customers and CBOs enance mode)
CalSAWS Production	CalSAWS Production and Self Service in IVR not available beginning Friday 10/27 at 8:00 PM until Monday 10/30 by 6:00 AM. Contact Center available (limited) beginning Friday 10/27 at 8:00 PM until Monday by 6:00 AM. Imaging is view/read only.				
CalSAWS: LMS, PRT, Sandbox, Training		NO changes to system dow	ntimes for CalSAWS PRT and	I LMS for CalSAWS County Sta	ff

*as of 8/21/23

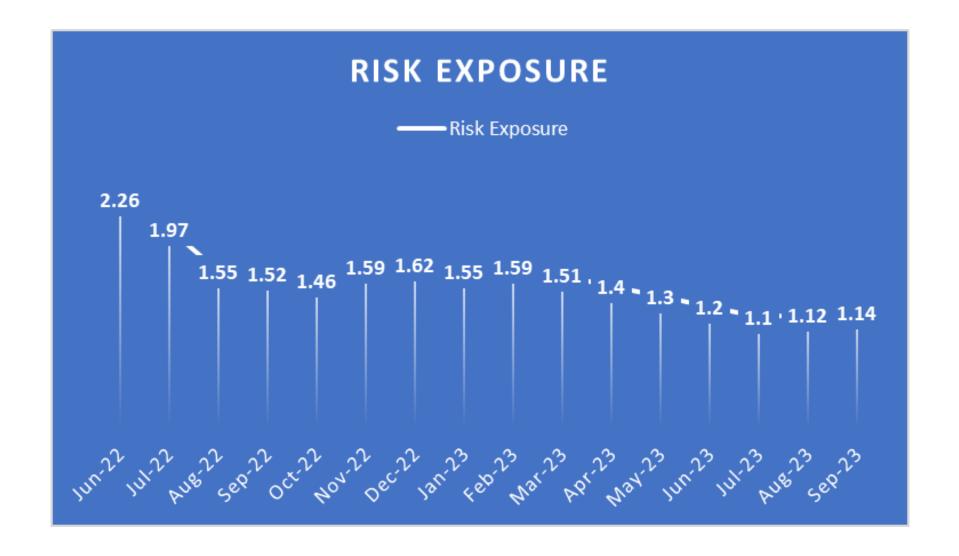


Wave 6B Cutover

Quality Assurance

- The issue that was encountered in 5B was fixed prior to the executing of Mock 6B, resulting in a clean run.
- SCR CA-250097 is scheduled to be deployed to production with 23.09.22, which will apply the updates to the caseworker default values in the Production environment
- Additional checks have been incorporated into the 6B cutover plan to verify all pre-requisite tasks and SCRs have been successfully completed and data validated in production prior to the start of the conversion process.

Project Overall Risk Exposure Trend



Wave 6 Risk Summary

CalWIN Counties Cutover Readiness Needs Risks

Risk	Risk Name	Wave 6
262	The CalWIN Counties may not be fully prepared for go-live if they do not	
	have sufficient or timely information	Low
264	CalWIN County waves may not complete their Imaging migration readiness	
	activities by their designated wave go-live dates	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
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 6
258	The CalWIN Conversion Cutover Window is at-risk of completing past the 84-	
	hour cutover window	Medium
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
280	Unresolved Go-Live Dependent defects not resolved prior to the Wave Go-	
	Live could impact County Case Worker business Post Go-Live	Medium

CalSAWS Scalability & System Performance Risks

Risk	Risk Name	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

Updated as of 9/6/23 RMG

Release and Policy Update/Communications

- Continuous Coverage Unwinding Status
- Early CalFresh Issuance
- BenefitsCal Roadmap and Release Highlights

CalSAWS Release and Policy Update Continuous Coverage Unwinding – DHCS Updates

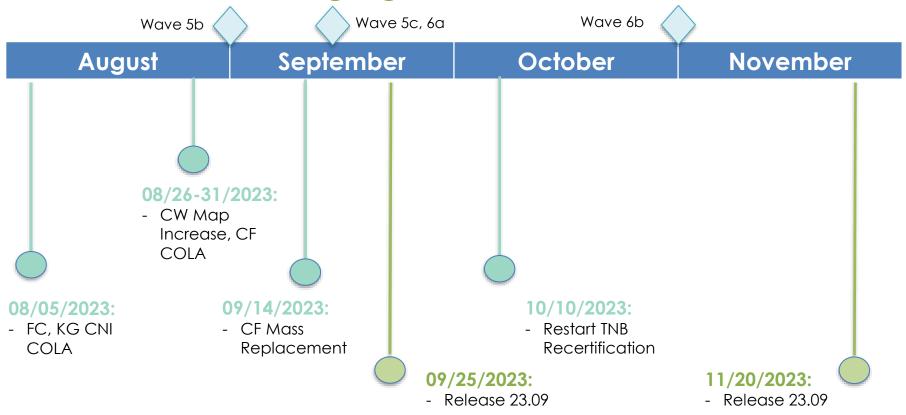
- Enhancements to MAGI ex parte process in CalHEERs
 - Automating 100 percent FPL and zero income waiver
 - Improving the Medicare check
 - Explore the use of the Individual Taxpayer Identification Number (ITIN) for individuals without a social security number
- On September 8, DHCS released the July 2023 Medi-Cal continuous coverage unwinding eligibility measures data on the <u>Medi-Cal Enrollment and Renewal Data webpage</u>.
 - Includes data on Medi-Cal enrollment, applications in progress, redeterminations, and disenrollments.
 - For the first time, includes demographic details for all measures, along with the top reasons for disenrollments.
- MEDIL I 23-42 Additional 1902(e)(14)(A) Waiver Approval
 - Stable Income
 - Unconditionally Available Income

CalSAWS Release and Policy Update Continuous Coverage Unwinding – Project Updates

- Uploading MC renewals using the document upload feature in BenefitsCal
 - With the implementation of SCR CA-265452, when a customer uses the doc upload feature in BenefitsCal and selects the document type of "Medi-Cal Renewal", the customer reporting record will be updated to 'Received' in CalSAWS.
 - Customer report status must be in 'Sent' or 'Incomplete' status
 - Customer reporting record 'due month' must be no older than 90 days at time of lookup or have a future due date
 - Target implementation date is 9/28/2023
- Validating data provided to DHCS via SIRFRAs
 - Updating ex-parte reporting logic based on discussions with DHCS
 - Updates are being made to the ad-hoc queries that support the SIRFRAs
- Stable Income Waiver MEDIL I 23-42
 - Working with DHCS on automation options and timeline for the stable income waiver for Non-MAGI MC

CalSAWS Release and Policy Update

CalSAWS Release Highlights



- CF Mass Replacement: FNS authorized the mass replacement at 30 percent of regular benefits issued in August 2023, for the 22 approved zip codes in the following 14 counties: Calaveras, Contra Costa, Del Norte, Humboldt, Kings, Lake, Mariposa, Nevada, Placer, Santa Cruz, Siskiyou, Trinity, Tulare, and Tuolumne.
- Per ACL 21-131, ACIN I-35-23 restart TNB recertifications beginning with those due in November 2023 and make new recertification periods 12 months long and increase the TNB restoration period to 90 days.

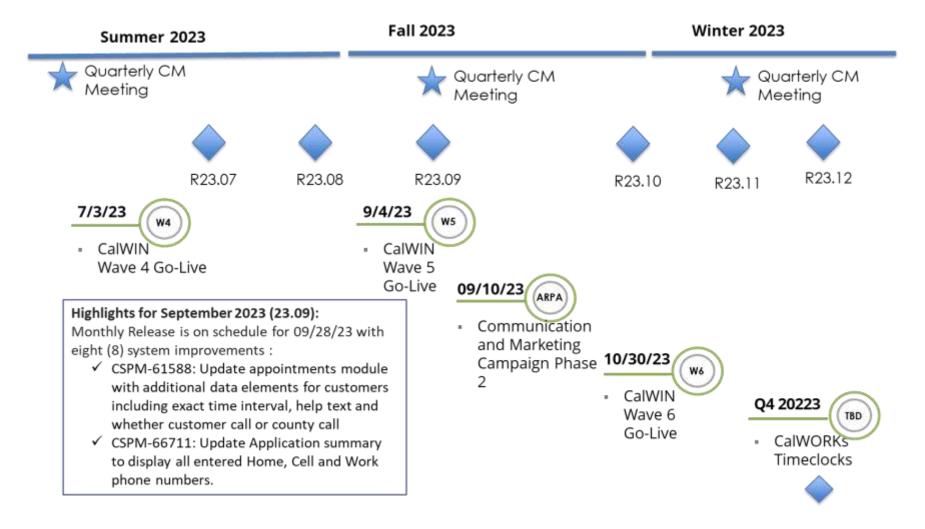
CalSAWS Release and Policy Update

CalFresh Early Issuance

- CDSS is working on submitting a waiver to FNS regarding issuing October CF benefits early in preparation for a potential federal shutdown
- Main Payroll for October and resulting files to be provided to FIS by 9/22/2023 @ 2:00am
- Final guidance is needed by 9/15/2023

BenefitsCal

Upcoming Release Highlights



BenefitsCal Update

- ROI Update
- Collaboration Model and Customer Experience
- Foundational Testing Processes, Problem Resolution Procedures, & QA

BenefitsCal Update ROI Update

- Kickoff meeting was held August 14
- September 11, first "working session" held
 - There were 43 attendees that included Counties, State Partners, Advocates, CWDA and CalSAWS/BenefitsCal staff members
 - Primary focus was to begin addressing questions and concerns that have been raised centering on Policy
 - CDSS and DHCS have been actively engaged in providing explanations of policy and state letter references. Collaboratively they provided written updates that were shared with the ROI Workgroup members.
 - Questions and concerns have been captured in a list of Agenda Topics broken into three main categories; Policy, Processes and Automation.
 - * Tracking Log created to capture questions and concerns and results of conversations. It has been shared with members for transparency and has been circulated to gather input from members.

BenefitsCal Update

ROI Update

- Next meeting will be September 18
 - Focus of meeting will be to continue addressing policy items
- Next meeting dates scheduled
 - 9/18
 - 10/2
 - 10/23
 - 11/13
 - Future dates TBD

BenefitsCal Update

Customer Experience Enhancements

BenefitsCal has made the following enhancements to improve the customer experience relating to account creation and management, dashboard, and website usability and language.

Key

- Account Creation and Management
- Dashboard/Renewals
 - Overall Usability Improvements

Security Questions

Adjusted the security question answer rules to allow customers to use spaces. (June 2023)

Homepage and **Announcements**

Redesigned homepage to create "journeys" for users based on their goals and needs. Redesigned announcements to highlight more urgent or time-sensitive announcements. (August 2023)

Verification Code Help

Added more help text to quide customers through phone and email verification while creating an account and resetting their password. (June 2023)

Q Global Search

Added search bar to allow customers to search all help content on BenefitsCal. (July 2023)

Details: Periodic Report and Renewals

Updated customer dashboard to display the date that Periodic Reports and Renewals are received through any channel (BenefitsCal, mail, office). (July 2023)

"Things to Do": Periodic Report and Renewals

Added a note to the customer dashboard to let customers know when their Periodic Report and Renewals will be available to complete. (August 2023)

Added informational messages to inform customer when BenefitsCal is in offline mode and enabled Case Details and IRT information. (June 2023)

Maintenance Mode

RCA/TCVAP

Added language across BenefitsCal pages to include details about RCA and TCVAP benefits. (June 2023)

BenefitsCal

Support Channels Available for Customers and CBOs

Self Service Support

Support Materials - Videos

18 videos available under BenefitsCal YouTube channel covering areas including account creation, renewals, document upload and other areas

Quick Reference Guides (QRGs)

23 QRGs available online under CalSAWS.org to assist Customers and CBOs across multiple areas including apply for benefits, dashboards

Help Center & Global Search

Provides support materials such as FAQs, How-To Videos, Program Rules, Program Descriptions and Learning Tools. Allows customers to perform a keyword search on BenefitsCal.com

Assisted Support

County Service Desk

There are multiple channels available for customers and CBOs to get assistance from Counties including:

- County Help Desk
- Chat with a County Representative
- Call me

AskCalSAWS

Customers and CBOs can post question via AskCalSAWS.org





BenefitsCal

The below provides foundational testing process performed on the BenefitsCal to confirm release readiness. Each testing type has specific set of activities.



1. Usability Testing

By conducting multiple rounds of usability testing with users and other stakeholders, we confirm the proposed design from concept to a working model.

2. Unit and Dev Integration Testing

Verify every unit of development against design. using manual and automated testing.

3. System Integration Testing (SIT)

Verify end-to-end business functionality and interfacing of web services.

Smoke,
Regression, Cross
Browser &
Device, ADA,
and Multi
Language tests
conducted for
system stability
and accessibility.

4. Independent Testing, County and Stakeholder Validation

Validate the approved design functionality as intended in the "real world." Usability Testing, County Validation, State Partners, Advocate Testing, and Regression test executions are performed by identified Consortium, County, Advocate and QA Team.

5. Performance Testing

Simulate real-world application usage to optimize and scale the infrastructure using Load, Stress & Endurance tests using integrated and isolated test executions.

6. Security Testing

Assess security
vulnerabilities and
unauthorized access
of BenefitsCal using
Static Application
Security Testing
(SAST) scan for the
source code and
Dynamic
Application Security
Testing (DAST) scan
for application run
time.

Key activities include Defining User Scenarios → **Test Creation** → **Test Execution** → **Production Deployment** → **Customer Feedback**

BenefitsCal – Communications & Marketing Campaign Update

Targeted Marketing Campaigns Determined by Stakeholder Priorities









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 – Communications & Marketing Campaign Update

Customizable Brochure – Logos, Contact Info, Hours

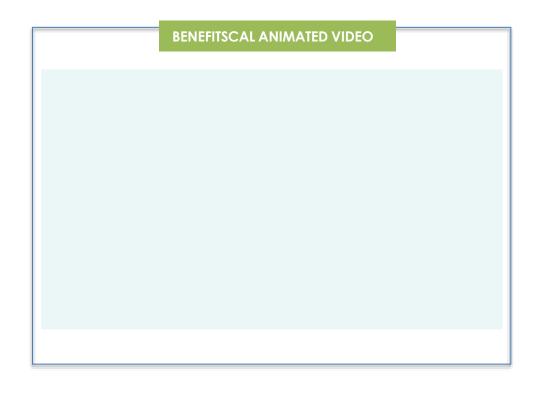
- Brochure based on samples provided by the Regional Managers and input from LA County
- Translated into 20 threshold languages



BenefitsCal - Communications & Marketing Campaign Update

Animated Video – English Audio (On or Off) with 20 Threshold Languages (Closed Captioning)

- Video extended based upon input from stakeholders to accommodate languages other than English
- Takes into consideration:
 - Accessibility
 - Color Contrast
 - Readability
 - BenefitsCal Branding and Color Palette
- Posted on <u>YouTube</u> 8/30/23
 - Views To Date (as of 9/8): 550+
 - Subscribers: 5700+



BenefitsCal - Communications & Marketing Campaign Update

Email Prioritization and Segmentation

Campaign ID	3d	3e	3a	4b	4 a	4c
Rank /Preference Order (As per survey responses)*	1	2	3	4	5	6
Date	5th Sep	6th Sep	7th Sep	8th Sep	11th Sep	12th Sep
Campaign Description	Nudge CalFresh account holders to renew application after a customer creates an account	Nudge BenefitsCal account holders to complete reports and upload documents	Nudge Medi- Cal account holders to renew application after they create an account	Nudge customers who submitted a paper application and included email address or cell phone number, to create a BenefitsCal account	Nudge customers with an incomplete application to complete the application	Nudge custo mers to create a BenefitsCal account and manage their reports and renewals
Email Sent	53,950	20,313	93,357	282,236	39,625	88,479
Delivery Rate	95%	94%	95%	93%	98%	
Open Rate	77%	66%	66%	64%	56%	
Links Clicked	7862	1656	9282	9303	1645	

^{*}Preference order 3d>3e>3a>4b>4a>4c – This is as per the Communications and Marketing campaign prioritization survey responses

LEAP into CalSAWS

What is LEAP?

Listen. Examine. Act. Partner.

Listen

Listen and learn from all CalSAWS counties through Regional Listening Tours

Examine

Assess and review county feedback and determine appropriate next steps

Act

Together, County and Project staff will implement/execute an action plan based on priority needs

Partner

Opportunity to connect Counties with Project Experts and facilitate county-to-county engagement

What is LEAP?

Listen. Examine. Act. Partner.

- LEAP is a project listening tour to connect with CalSAWS Counties
- This is a way for counties to share how CalSAWS is working for them

Goal: Identify opportunities to maximize CalSAWS

usability





What is LEAP?

Listen. Examine. Act. Partner.

- From two months to two years, CalSAWS counties have taken individual paths and had unique usability experiences
- We want CalSAWS counties to maximize CalSAWS functionality to its fullest potential
- We'll leap to where we want to be by creating an action plan that is responsive to counties' feedback





What to Expect?

What To Expect from the LEAP team



Conduct Regional Listening Tours with the CalSAWS
Counties to understand where there
are knowledge and usability gaps



Collate, Assess, and Triage
County Feedback received to
create action plans



What to Expect?

What To Expect from the LEAP team



Develop and Provide as needed:

Supplemental education and training materials.

County-to-county engagement.

 Functional experts to assist counties with maximizing CalSAWS usability.



What to Expect?

What To Expect from the LEAP team



Communicate and Collaborate with all counties throughout LEAP activity

Provide Status Updates to counties through Regional Managers, Project communications, and public meetings



Who Will Be Involved?

CalSAWS Project Team

The LEAP team is comprised of a **cross-functional team** from different Project Areas:

- Customer Engagement
 (Training, Change Management, Implementation Support)
- Regional Managers
- Quality Assurance

Functional Experts

Who Will Be Involved?

CalSAWS Counties

The LEAP team will request **County Volunteers** via the CRFI process

Counties are highly encouraged to participate in the Regional Listening Tours and share specific county experiences with the CalSAWS system



Next Steps

- CRFI will be released this Fall to recruit for participants from Region 3 counties
- 2 Region 3 Listening Tour will be held first
- 3 Results from Region 3 Listening Tour to be compiled
- Region 6 Listening Tour will follow at the conclusion of Region 3
- Listening Tours for remaining Regions will be scheduled

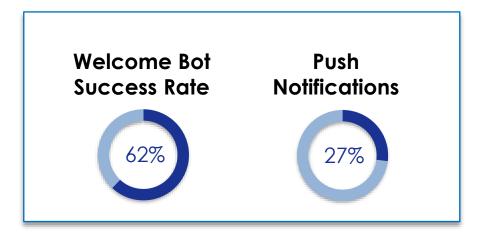
Contact Center Update

- Welcome Bot
- Authentication Bot and Push Notifications

Welcome Bot Dashboard

Dashboard data is averaged across all counties since rollout

Welcome Bot



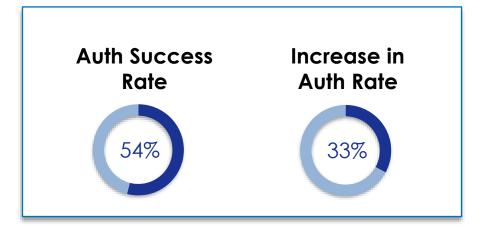
Welcome Bot Update

- Worked with counties on call flow changes to optimize call routing; most recent examples include:
 - Modified "Apply for Benefits" flow based on feedback
 - Added introductory message on Foster Care and CBOs prior to Welcome Bot prompts
- 2. Continue to review feedback for updates to optimize customer experience and flow

Authentication Bot Dashboard

Dashboard data is averaged across all counties since rollout

Authentication Bot



Authentication Bot Update

- 1. Continues to significantly increase customer authentication rate
- 2. Continue to receive positive feedback

Procurement Updates

- M&O Procurement
- 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 Reprocurement

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 23.09	5	9	289/297	In Progress	
BenefitsCal 23.09.*	7	3	Ad hoc	In Progress	
Total	12	12	289	In Progress	

Functional/Test Highlights

23.09.* BenefitsCal Independent Test
23.09 CalSAWS Independent Test
CFAP/FCED/WDTIP/ROI Designs

QA Technical Reviews

SLAs (CalSAWS, Imaging, OCAT BenefitsCal) M&O Annual Plan and SSP Updates

7Root Cause
Analyses (RCA)

46
Technical
Updates
(SCRs and Defects)

Technical Highlights

Service Level Agreements (SLA)

M&O Annual Plan and SSP Updates

Root Cause Analyses

Technical SCRs and Defects

QA Migration Reviews

10 Retrospectives Per Wave

10
Implementation
Support Staff

934
Migration
Requirements

CDV Testers Supported

Migration Highlights

Wave 5B Cutover Lessons Learned

Wave 5 Retrospectives

Wave 5 Implementation Support Staff

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 23.09 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 Conversion
- Triage and Resolution of open Conversion Defects
- Mitigation actions and improvements for the upcoming conversion cutovers



CalWIN Implementation

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

Adjourn Meeting

