

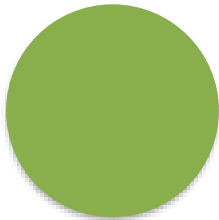


CalSAWS | Project Steering Committee Meeting



September 21, 2023

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# 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

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# Action Items

4. Approval of the Minutes from the August 17, 2023, PSC Meeting and review of Action Items.



# Informational Items

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# Wave 5 Go Live Debrief

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# 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>
<b>Pre-Conversion</b>	
<b>Project plan table reads</b> <ul style="list-style-type: none"><li>✓ Review tasks and confirm owners</li></ul>	<b>Project plan table reads</b> <ul style="list-style-type: none"><li>✓ Review tasks and confirm owners</li></ul>
<b>Preflight checklist</b> <ul style="list-style-type: none"><li>✓ Review Conversion Code, Source data, Communications, and Milestones</li></ul>	<b>Preflight checklist</b> <ul style="list-style-type: none"><li>✓ Review Conversion Code, Source data, Communications and Milestones</li><li>❑ Earlier deployment and validation of default worker assignment</li><li>❑ Over the shoulder Production validations of code and production data</li><li>❑ Expanded analysis for W6 of any other SCRs that impact conversion</li></ul>
<b>During Conversion</b>	
<b>Tier Reviews</b> <ul style="list-style-type: none"><li>✓ Validate tables and row counts</li></ul>	<b>Tier Reviews</b> <ul style="list-style-type: none"><li>✓ Validate tables and row counts</li></ul>
<b>Stage Gate Reviews</b> <ul style="list-style-type: none"><li>✓ Review data after it is transformed to people, applications, (open, closed, pending) cases, recovery accounts, appointments, placements, sanctions and shell cases</li></ul>	<b>Stage Gate Reviews</b> <ul style="list-style-type: none"><li>✓ Review data after it is transformed to people, applications, (open, closed, pending) cases, recovery accounts, appointments, placements, sanctions and shell cases</li></ul>



# 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
  - 4,501 County Users added
  - 4.19 billion rows added to the CalSAWS database
- Contact Center and Imaging solutions went live at the same time.

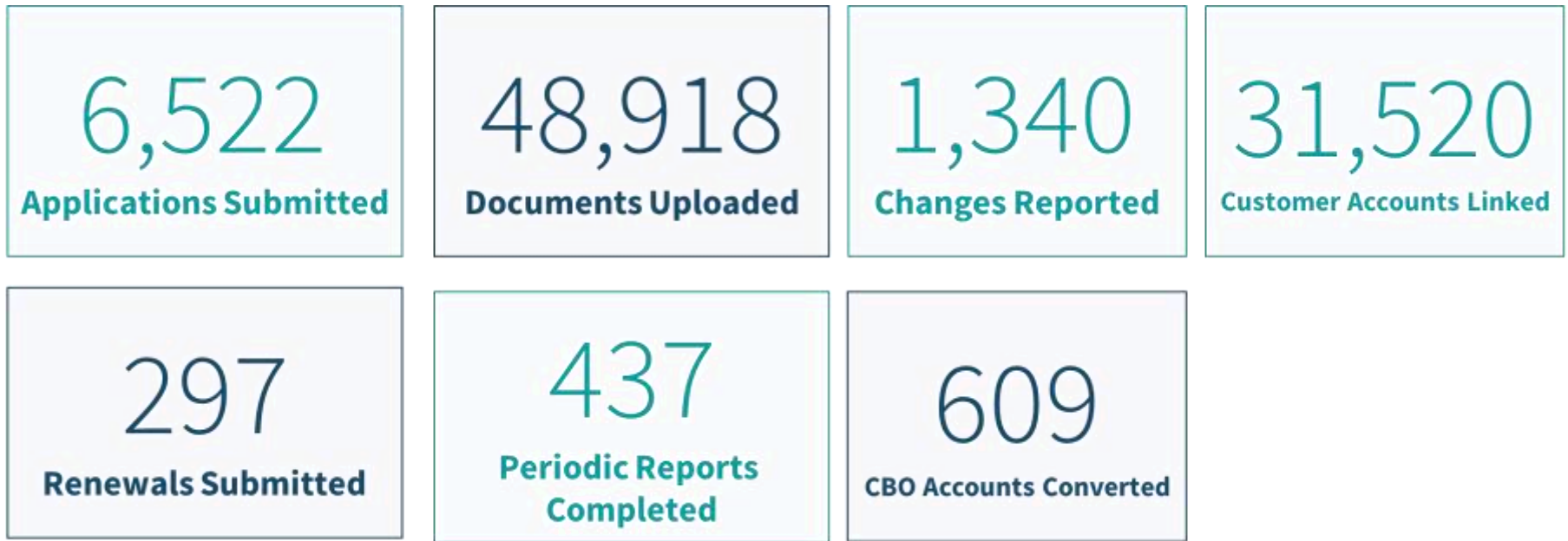
# Wave 5 CalSAWS Update

## 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.



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

# Post Implementation Support

## Assisting the Wave 5 Counties through 12/29/23

- Hearing from our Wave 5 Counties
- Post Implementation Support is going strong!
  - 159 CalSAWS County staff are supporting Wave 5 Counties!
  - 310 *total* volunteers from the CalSAWS Counties and Project providing support throughout migration period
- Approximately 900+ virtual interactions recorded in the first ten days of go-live with a resolution rate of 91%



# Wave 4 Retrospective

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# 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:

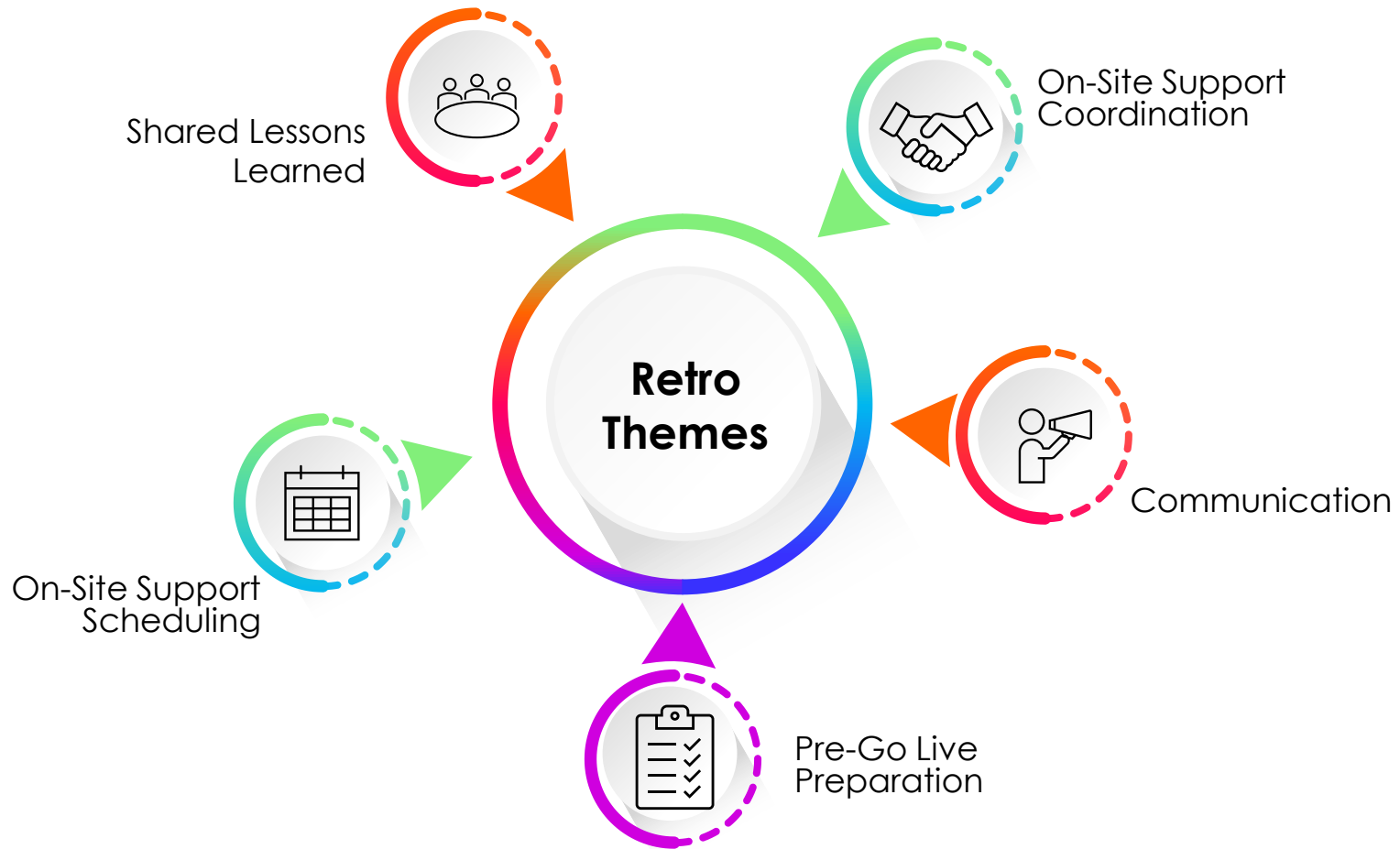
1. **Retrospective themes from teams** on opportunities for improvement.
2. **Changes that counties will see** from what we learned with Wave 4.





# OCM, Training & Implementation Retrospectives

## Opportunities for Improvement – Themes



# OCM, Training & Implementation - 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



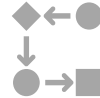
### Imaging

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 pre-cut 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

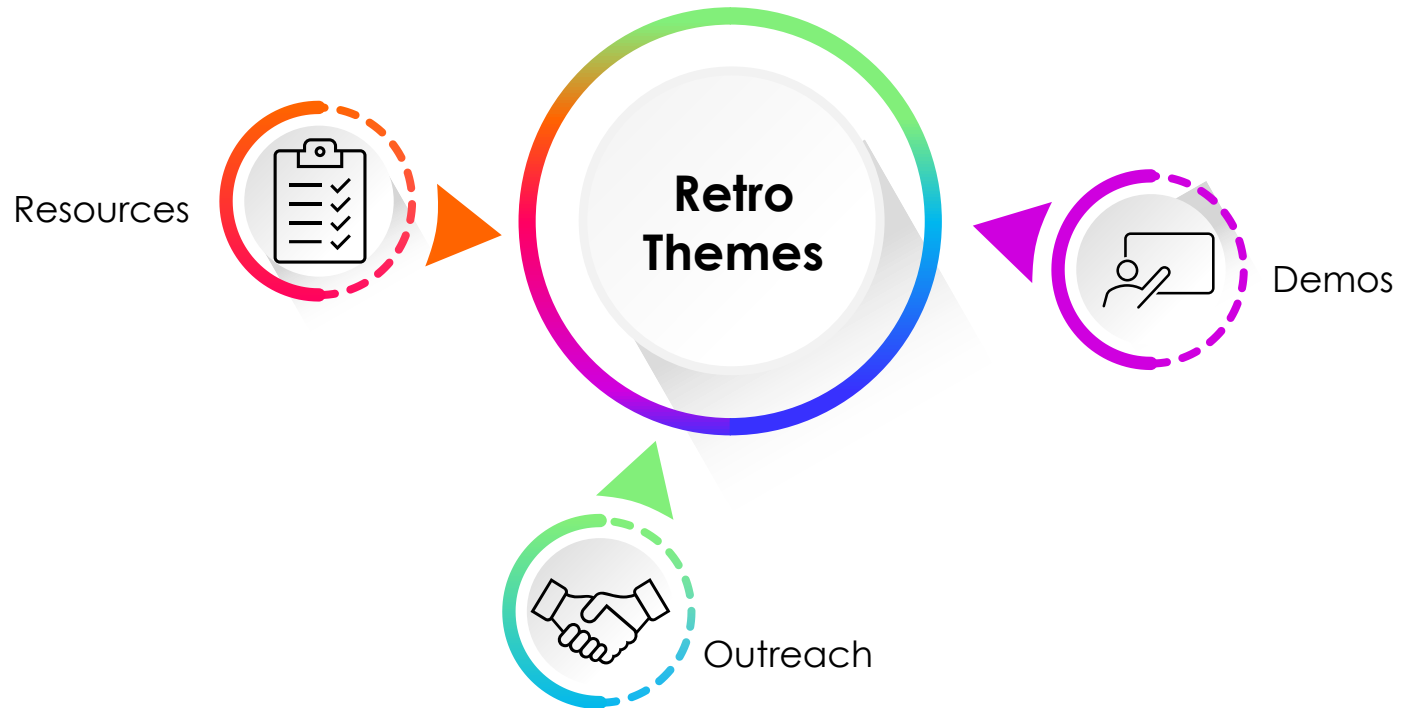
The Mapping Transformation report has been distributed with a highlight on "What You Need to Know".

### Conversion

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

# BenefitsCal Retrospective

## Opportunities for Improvement – Themes



# BenefitsCal – Future Wave Changes

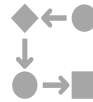
## TOOLS



### 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

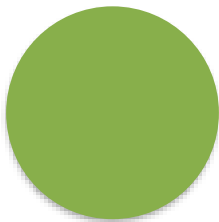
Continue client outreach efforts to support BenefitsCal awareness and improved access to services.





## Future Wave Readiness

- Wave 6 Readiness
- Wave 6 Risk Summary



# Overall CalSAWS Readiness: Wave 6







Readiness Areas and Categories as of 9/18/2023.

Readiness Area	Readiness Category	CalSAWS (9/18/23)
<b>Application</b>	Deploy CalSAWS Releases 23.09	On Schedule
	Contact Center Readiness	On Schedule
	Imaging Readiness	Watch Item
	BenefitsCal Readiness	On Schedule
	Central Print Readiness	On Schedule
<b>Integration</b>	County Interface Partner Test (IPT) Execution	Watch Item
	State Interface Partner Test (IPT) Execution	Complete
<b>Conversion &amp; CalWIN Migration</b>	Defect Resolution	On Schedule
	EDBC Match – Auto Review Rates	On Schedule
	Mock Cutover	Complete
	Cutover Window	On Schedule
<b>Technical</b>	County Network Connectivity	Complete
	Performance Testing	On Schedule
<b>Training</b>	WBT Training Delivery	On Schedule
	ILT Training Delivery	On Schedule
<b>Organization</b>	Change Discussion Guides (CDGs)	Complete
	Communications	On Schedule
	Business Process Reengineering	Complete
	Configuration	Complete
	Process Simulation	On Schedule
<b>Implementation</b>	Implementation Planning	On Schedule
	County Prep	On Schedule
	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)





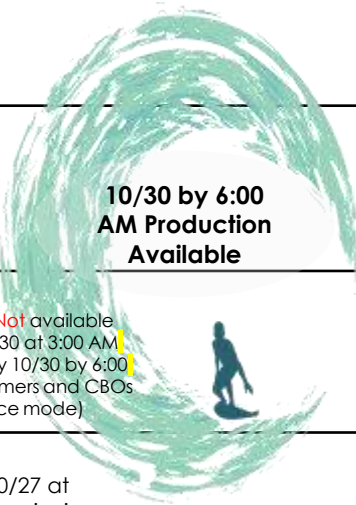




	Friday 9/15/23	Saturday 9/16/23	Sunday 9/17/23	Monday 9/18/23
Read Only Counties		<b>NO changes to system downtimes for CalWIN Counties and Customers</b> <i>Business as usual (Normal Sunday Maintenance)</i>		
Sacramento San Francisco San Luis Obispo		 <b>CalWIN Not</b> available beginning 9/16 at 6 PM	 <b>CalWIN</b> is available beginning 9/18 at 6 AM	
CalSAWS Customers and CBOs		<b>BenefitsCal</b> 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		 <b>CalSAWS</b> Production and IVR <b>not</b> 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	<b>NO changes to system downtimes for CalSAWS PRT and LMS for CalSAWS County Staff</b>			



\*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		 <b>My BCW Not</b> available beginning 10/26 at 5:00 PM. Apply for Medi-Cal on <a href="#">Covered CA</a> and CalFresh at <a href="#">GetCalFresh</a> until Monday 10/30 by 6:00 AM (and then directed to BenefitsCal).			
Sacramento, San Luis Obispo, San Francisco Staff		 <b>CalWIN</b> Remains available from 10/26 5:00 PM – 6:00 PM for workers to register applications from <b>MyBCW</b> .  <b>CalWIN Not</b> available beginning 10/26 at 6:00 PM  <b>OCAT Not</b> available beginning 10/26 at 6:00 PM			 <p><b>10/30 by 6:00 AM Production Available</b></p>
CalSAWS Customers and CBOs		 <b>CalWIN</b> is available for <i>read-only</i> beginning 10/27 at 6 AM, pending conversion outcomes  <b>BenefitsCal</b> is available for customers and CBO users without MFA enabled to submit applications beginning Friday, 10/27 at 8:00 PM until Monday, 10/30 by 6:00 AM		 <b>BenefitsCal Not</b> available Monday 10/30 at 3:00 AM until Monday 10/30 by 6:00 AM to customers and CBOs (maintenance mode)	
CalSAWS Production		 <b>CalSAWS</b> Production and Self Service in IVR <b>not</b> 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		<b>NO changes to system downtimes for CalSAWS PRT and LMS for CalSAWS County Staff</b>			

\*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 9/13/23



## 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
  - Explorer 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 [Medi-Cal Enrollment and Renewal Data webpage](#).
  - 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

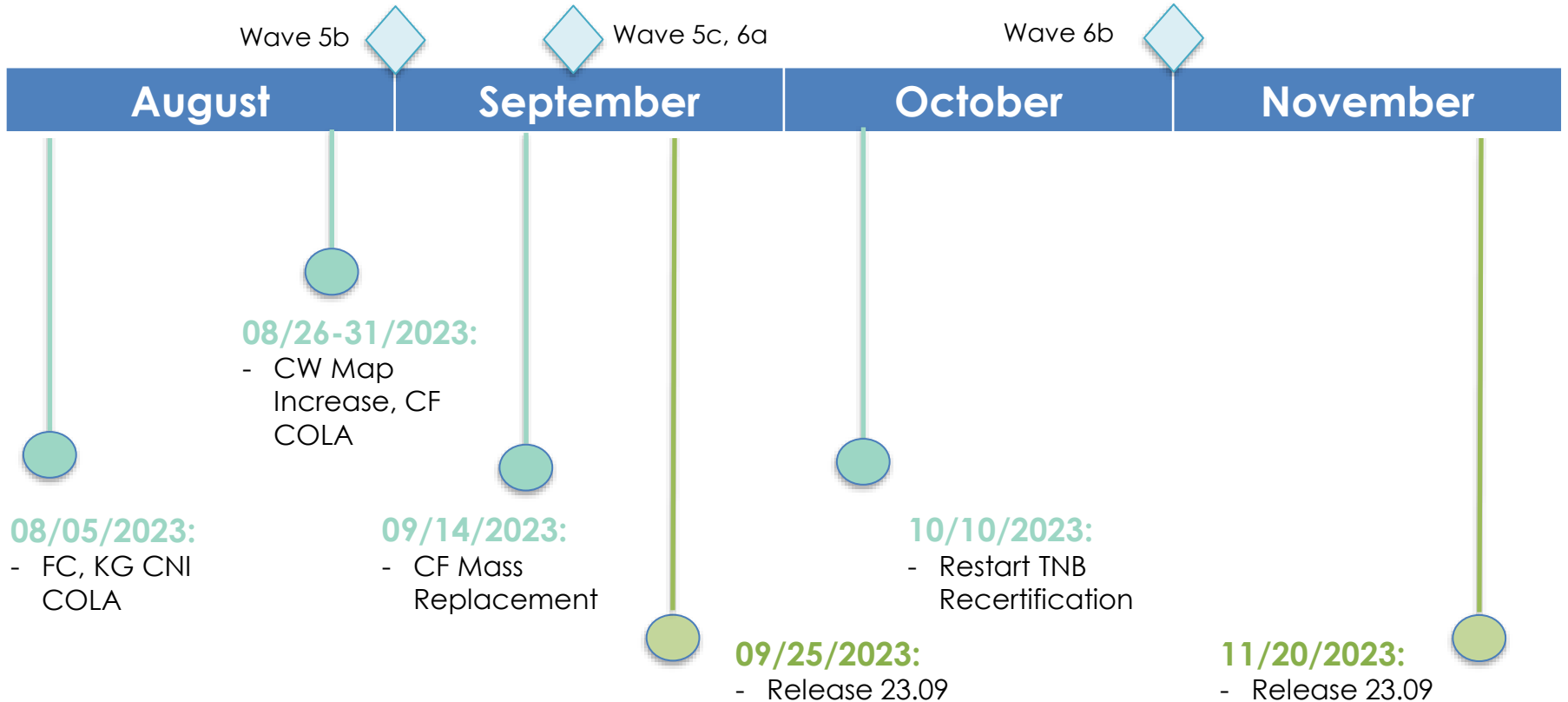
# CalSAWS Release and Policy Update

## Continuous Coverage Unwinding – Project Updates

- [MEDIL I 23-42](#) 1902(e)(14)(A) Waiver Approval
  - Working with DHCS on automation options and timeline for the stable income waiver for Non-MAGI MC
    - For October & November, REs will be advanced one year as a temporary measure while working on a more long-term solution
- 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
- 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

# CalSAWS Release and Policy Update

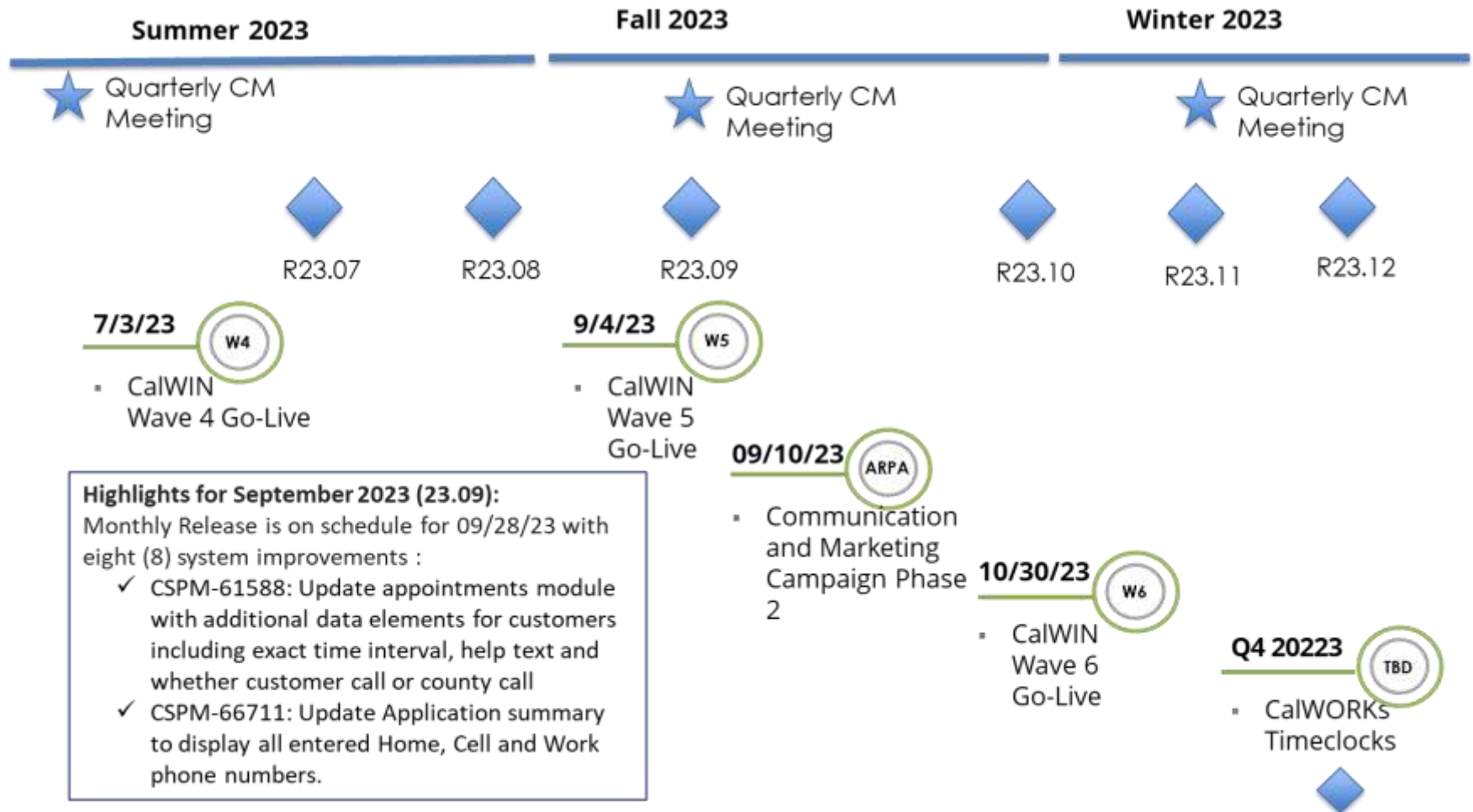
## CalSAWS Release Highlights



- 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.

# BenefitsCal







## Upcoming Release Highlights



# BenefitsCal

## Recent Release Highlights

**Key**

-  CM Enhancements
-  CM Research
-  Completed
-  Other Updates
-  Other Research
-  Bundled Update

### August Release 23.08

- ✓ **CSPM-35858:** Support the application experience for a primary applicant who intends to apply for no programs.
- ✓ **CSPM-66213:** Redesign the BenefitsCal homepage to create additional points of access for existing and new users.
- ✓ **CSPM-66157:** Redesign the BenefitsCal announcements (outcome of research CSPM-64316).

- ✓ **CSPM-65886 proof of concept outcome will be implemented as CSPM-64443:** Update the visual layout of the 12-page Rights and Responsibilities to be incorporated on the application signature page.
- ✓ **CSPM-66474:** Prevent duplicate periodic and annual reports .
- ✓ **CSPM-32596:** Disability Accommodations additional text field.
- ✓ **CSPM-65403:** Provide a notice about when periodic reports will be visible.
- ✓ **4 Technical Updates:** Including improvements in search engine optimization.

### August Research Activities

- ✓ **CSPM-65313:** Enhance chatbot to add FAQs.

### September Release 23.09

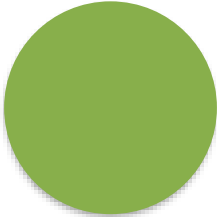
- **CSPM-65313:** Additional Chatbot FAQs.
- **CSPM-66711:** Display work and cell phone numbers on the summary page.
- **2 Technical Updates:** Including additional filters to Qlik reporting .

### September Research Activities

- **CSPM-67105:** Assistance with identification of the type of document being uploaded.
- **CSPM-67149:** Application Status Tracker.
- **CSPM-67189:** Display Primary Applicant Status on a case.
- **CSPM-TBD:** Conduct user acceptance testing on the selection of periodic report and renewal options in the document upload flow.



## BenefitsCal Update

- ROI Update
  - Collaboration Model (CM) Update
  - Foundational Testing Processes, Problem Resolution Procedures, & QA
  - Marketing Campaign Update
- 
-

# 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)**

### Verification Code Help

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

### 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)**

### Global Search

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

### Maintenance Mode

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

### 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

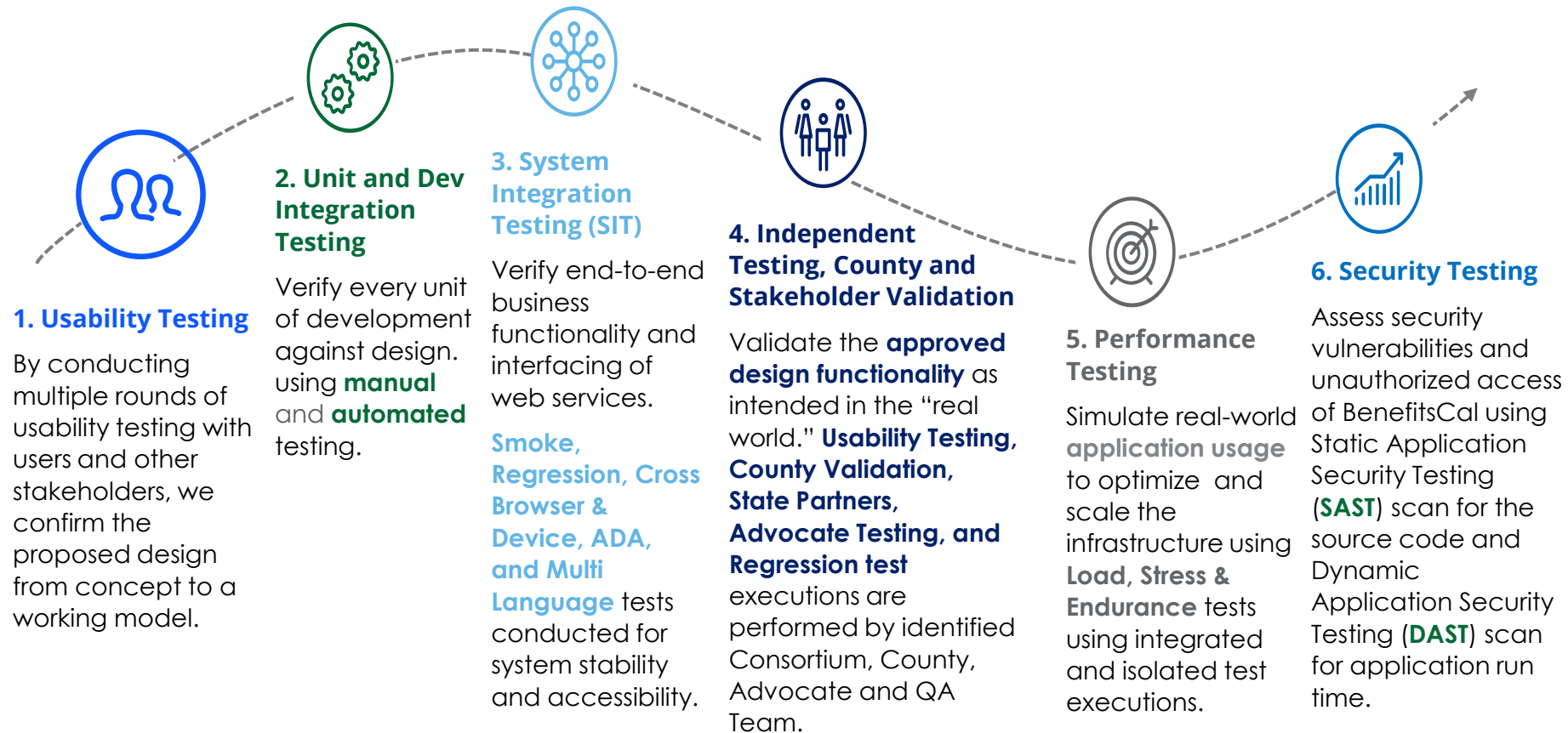
#### AskCalSAWS

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.



**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



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 – 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

**Need Help? Don't Worry!**  
Robin says,  
"Visit BenefitsCal.com!"

**Apply for:**  
Medi-Cal® Health Coverage  
CalFresh / Supplemental Nutrition Assistance Program (SNAP) Food Assistance  
General Assistance or General Relief, Refugee Cash Assistance, Trafficking and Crime Victims Assistance Program Cash Aid  
Supportive Services and Child Care  
CalWORKS California Work Opportunity and Responsibility to Kids

**Customer Service Center**  
Toll Free

Monday- Friday  
Saturday  
Sunday

**Do you need help because of a disability?**  
Please contact the ADA Hotline at:

**Key Features**

1. Apply for benefits
2. Check eligibility
3. Renew benefits
4. Complete redetermination
5. Get information on your case
6. Upload documents
7. Report a change
8. Find nearby county offices
9. Access How-to videos

**Welcome to BenefitsCal!**  
BenefitsCal is a website for the California counties allow customers to apply for, view, and renew benefits for health coverage, food and cash assistance through the website ([www.BenefitsCal](http://www.BenefitsCal))

**How-to Guide for BenefitsCal**

**ACCOUNT CREATION STEPS**

1. Visit [BenefitsCal.com](http://BenefitsCal.com)
2. Click on **Create Account**, and enter your personal information (An email ID is required to create an account)
3. Secure password and submit.

**LOGIN STEPS**

1. Click on **Login**
2. Enter your Email and Password or click **Create Account**.

**STEPS TO LINK BENEFITS CAL ACCOUNT TO A CASE**

1. Go to **Things to Do** section.
2. Click on **Link a Case** hyperlink.
3. Enter the Date of Birth (MM/DD/YYYY) and Zip Code of the primary applicant.
4. Select and enter either: (i) Digit SSA/EST Number/ Case Number.
5. Click **Next**.

**STEPS TO UPLOAD DOCUMENTS**

1. On the user dashboard, select **Upload a Document**
2. From the document center page, click on **Upload a Document**.
3. Select the case/application number.
4. Select person and document type.
5. Click on **Select Files** and choose all the required documents.
6. Click **Upload** to upload the document.
7. A confirmation receipt will display on the screen.

**STEPS TO RENEW BENEFITS**

1. From the dashboard, click on **Start your Renewal**.
2. Review the renewal date and click on **Start**.
3. Review the status of restrictions and click on **Start the Next Section**.
4. Follow the alerts on the screen to verify or change your personal information.
5. Review the Rights and Responsibilities and Other Important Information section.
6. For CalWORKS, select the **Unable-to-Work Informational Notice** checkbox to confirm.
7. Enter information required.
8. Click the box to electronically sign the renewal.
9. Click **Submit Signature** to continue.

**FREQUENTLY ASKED QUESTIONS (FAQS)**

**How do I reset my BenefitsCal password if I've forgotten it?**

1. Visit the BenefitsCal login page to reset your password.
2. Click **Forgot Password**.
3. Enter your registered email.
4. Follow the instructions to verify your identity and set a new password.

**How is my eligibility for BenefitsCal programs determined?**

BenefitsCal has a pre-screening tool that helps you assess your eligibility for benefits programs based on factors like household income, size, and other criteria.

**How do I report changes or submit documents through BenefitsCal?**

1. Log in to your BenefitsCal account.
2. Navigate to the appropriate section.
3. Follow the prompts to report changes or upload necessary documents.

**I am registered on a non-functioning California welfare portal (Your Benefits Now, MyBenefits CalWORKS, or Cal Renewal). Should I sign up for something new?**

Yes. For online access to information about your existing benefits, you need to create a new account with BenefitsCal and link your existing case.

**How can I get more help with the BenefitsCal website?**

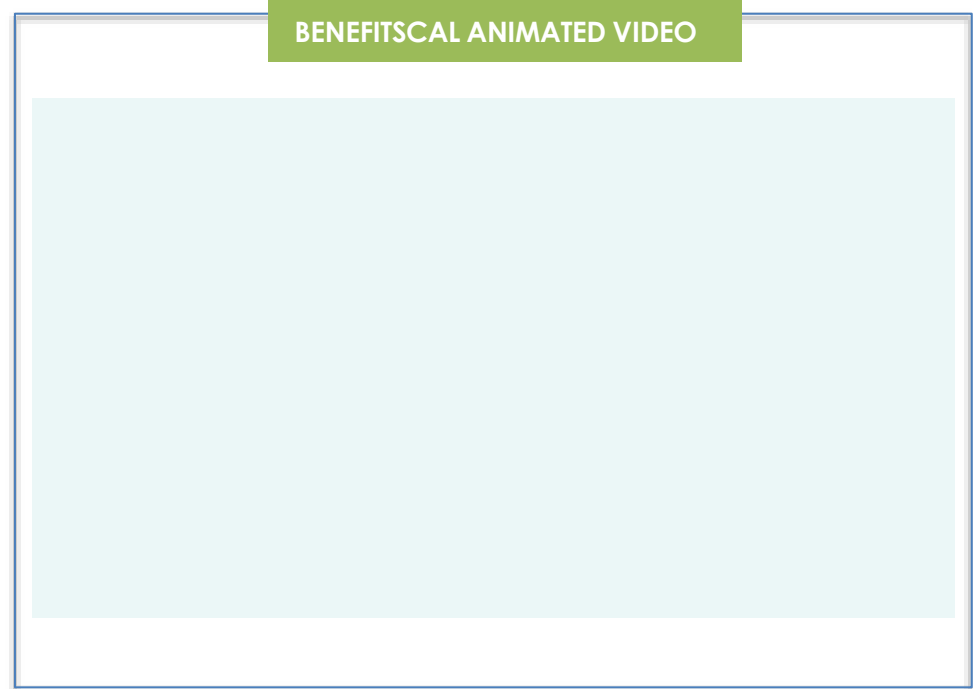
Access help here: <https://BenefitsCal.com/Help/FAQ>

**Scan the QR code to learn more about BenefitsCal**

# 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 [YouTube](#) 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	4a	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 customers 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 Usability

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# 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

### **L**isten

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

### **E**xamine

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



# What to Expect?

## What To Expect from the LEAP team

### Act

#### 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

### **P**artner

**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

- ① 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
- ④ Region 6 Listening Tour will follow at the conclusion of Region 3
- ⑤ Listening Tours for remaining Regions will be scheduled





# Decommissioning of Environments

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# Planned Environment Decommissioning

## UAT2 and Sandbox

Sandbox and UAT2 environments were purpose built to support conversion activities, with this coming to an end these will be retired. This is a reminder decommissioning for both environments is planned for end of October 2023.

UAT2; CIT 0314-23; Delivered 8/23

- **Background:**

- The CalSAWS UAT2 environment was created to allow migrating CalWIN county team members to familiarize themselves with the CalSAWS application and run process simulation. Upon migration of all CalWIN counties into CalSAWS, the UAT2 environment will have accomplished its purpose.

Sandbox; CIT 0285-23; Delivered on 8/3

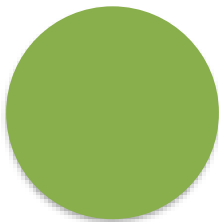
- **Background:**

- The CalSAWS Sandbox environment was created to allow migrating CalWIN county team members to familiarize themselves with the CalSAWS application and associated systems. Upon migration of all CalWIN counties into CalSAWS, the Sandbox environment will have accomplished its purpose.



## Contact Center Update

- Welcome Bot
- Authentication Bot and Push Notification



# Production Issue

## Summary of 9/18 Production Service Interruption

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(9/18, 10:49 AM) AWS encountered a network latency issue impacting East and West regions.

Issue impacted performance for CalSAWS online application and Contact Center agent-facing call control panel (eCCP and default CCP); no impact to BenefitsCal, Batch or Lobby.

Impact:

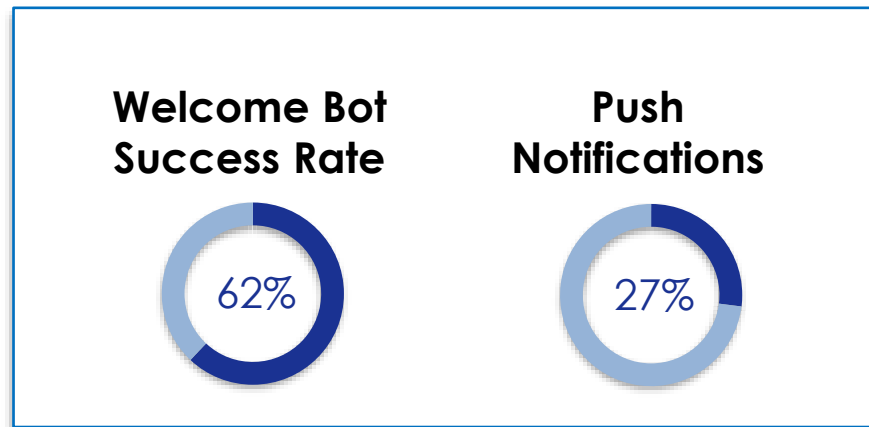
- (10:49 AM PST) Users experienced slowness in CalSAWS online application and new logins required numerous retries; Contact Center users began experiencing intermittent log-in errors
- (12:15 PM PST) User login experience and performance for CalSAWS online application and Contact Center returned to normal levels
- (3:38 PM PST) Contact Center received subsequent, isolated reports from some counties related to reoccurring intermittent log-in errors to eCCP and default CCP; users who were already logged in from earlier in the day remained unaffected
- (8:05 PM PST) Contact Center log-in issues resolved; log-ins to all counties were successfully validated
- 9/19 analysis on county business metrics for Wave 5 counties revealed minimal impact to average number of calls handled per day (10-percent overall reduction in calls handled across three counties when comparing 9/11 vs. 9/18)

Detailed RCA is in progress

# Welcome Bot Dashboard

Dashboard data is averaged across all counties since rollout

## Welcome Bot



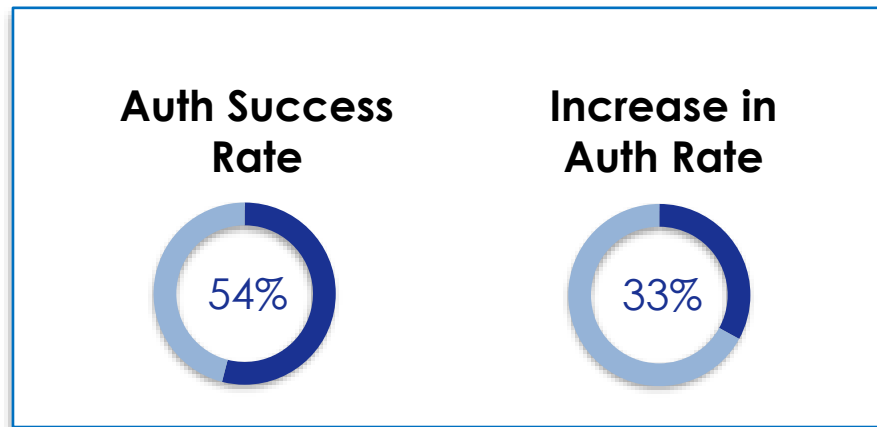
## Welcome Bot Update

1. 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
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# 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



## Key QA Activities

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# 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	297/297	25
BenefitsCal 23.09.*	7	3	Ad hoc	In Progress
<b>Total</b>	<b>12</b>	<b>12</b>	<b>297</b>	<b>In Progress</b>

### Functional/Test Highlights

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

### QA Technical Reviews

<b>29</b> SLAs (CalSAWS, Imaging, OCAT BenefitsCal)	<b>10</b> M&O Annual Plan and SSP Updates	<b>7</b> Root Cause Analyses (RCA)	<b>46</b> Technical Updates (SCRs and Defects)
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### Technical Highlights

Service Level Agreements (SLA)  
 M&O Annual Plan and SSP Updates  
 Root Cause Analyses  
 Technical SCRs and Defects

### QA Migration Reviews

<b>10</b> Retrospectives Per Wave	<b>10</b> Implementation Support Staff	<b>934</b> Migration Requirements	<b>51</b> CDV Testers Supported
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### Migration Highlights

Wave 5B Cutover Lessons Learned  
 Wave 5 Retrospectives  
 Wave 5 Implementation Support Staff  
 Wave 6 County Data Validation (CDV)



## Update on State IV&V Activities

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# 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



## State Partners Updates

- OTSI
  - CDSS
  - DHCS
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# Regional Updates

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Adjourn Meeting



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