#### CalSAWS | JPA Board of Directors Meeting



October 20, 2023

# Agenda

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

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

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

## Action Items



### Action Items

- 4. Approval of Consent Items
  - a. Approval of the Minutes and review of the Action Items from the September 22, 2023, JPA Board of Directors Meeting.
  - b. Approval of RGS Amendment 38, which includes annual update to cost of benefits, clarification of contract terms, reconciliation of FTE counts, and administrative changes such as updated positions, and revised position descriptions.
  - c. Approval of Accenture Change Notice 29, which includes a request to add two (2) premise items, including Cal-OAR Modifications & Client Satisfaction Survey, Extend Medi-Cal Suspension for Incarcerated Adults, and three (3) county purchases, as well as reconciliation of CalSAWS DD&I Statement of Requirements.
  - d. Approval of ClearBest Change Order 7, Work Order 6, which includes a request to add (2) premise items, including Cal-OAR Modifications & Client Satisfaction Survey, Extend Medi-Cal Suspension for Incarcerated Adults.

### Informational Items



#### Wave 5 and CalSAWS Production Update and Status

- Key defect resolution Wave 5
- Print issue review
- System performance
- Welcome BOT turned off



# Wave 5 Key Defects

 Alameda was first county to utilize the Foster Care Placement Verification Process (aka VRU)

All placements converted as not requiring verification	Resolved on 9/6 by updating the required indicator
Manually verifying placement was requiring a CWS/CMS case number	Resolved on 9/18 by entering case number, SCR going through committee to no longer require case number
County and Project exchanged spreadsheets until county could introduce automation	Resolved on 10/7 when county successfully transmitted file

- Annual Foster Care Clothing Allowance Issuances were converted as authorized by EDBC instead of a payment request, causing CalSAWS to believe Main payroll was already issued on these cases – Resolved on 9/8 by disassociating issuance from EDBC
- Fresno County identified an issue where only the first page of images migrated to CalSAWS and worked with vendor to correct images – Resolved on 9/25 by Highland importing the remaining pages
- Alameda/Fresno skipped GR issuances due conversion and system rules setting incorrect reporting type – Resolved on 10/4 & 10/6 by updating the reporting type
- Time on Aid:
  - CalWIN produced future month time limit records during COLA processing requiring deletion in CalSAWS – Resolved on 9/19 by removing records
  - Time Limit months converted missing aid codes Resolved on 10/1 by adding missing aid codes

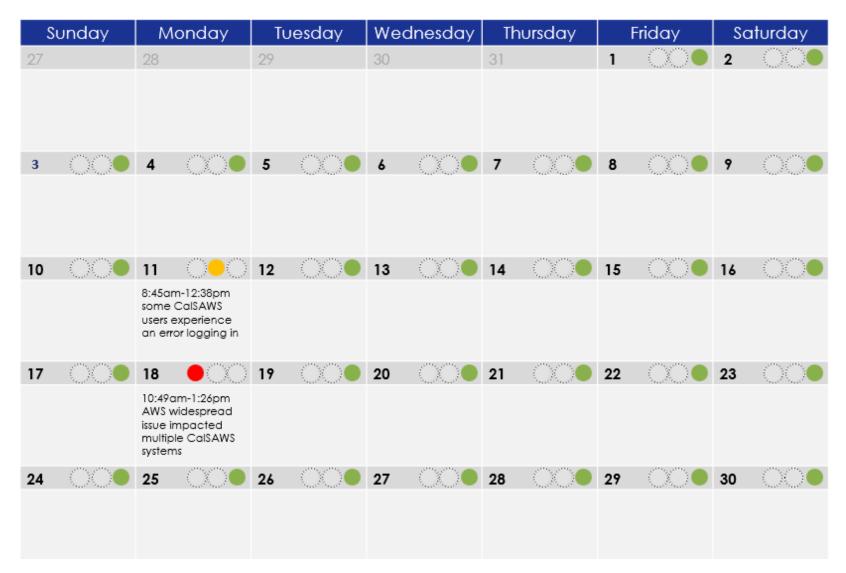
#### Print Issue Delayed Print

- Three Central Print work orders received on September 10, 2023 were erroneously cancelled by an operator
- Work orders included Fresno and Orange County mail pieces

Mail Piece	Fresno Volume	Orange Volume
Non-MAGI Screening Packet	147	1,155
Non-MAGI Turning 65 Packet	0	3
CF Recertification Packet	1	0
CF 285A Application Packet	721	2,958

- After discussion with the Counties affected, mail pieces we reprinted and mailed on October 4, 2023
- Daily reconciliation process already included:
  - Incoming files and counts to received files and counts
  - Received counts to work orders created
  - Verification that work orders in the queue were completed
- Adding a reconciliation of counts received to work orders printed to catch this specific circumstance of operator cancellation after work order creation but prior to printing

# System Performance September 2023 Production Highlights



#### Background:

The WelcomeBot attempts to identify a caller's intent using their response to an open-ended question and is placed in the appropriate queue. There is a disconnect in the handoff between the bot and the IVR call flow due to which, some callers are placed in incorrect queues, effectively creating poor customer experience. Welcome Bot roll out has been put on hold and has been disabled per county requests until action plan outlined completes.

#### Action Plan:

- 1. An end-to-end review was conducted to identify the disconnects between each county's call flow and the WelcomeBot.
- 2. Logged each discrepancy as a defect and a schedule created to address the defects.
- 3. End-to-end testing to be conducted to validate successful handoffs.
- 4. Set up meetings with each live county to monitor the customer experience after defect fix has been deployed.
- 5. Work with the counties on hold to re-deploy with the fixes.

# Future Wave Readiness

- Wave 6 Readiness
- Wave 6 Risk Summary



#### Overall CalSAWS Readiness: Wave 6

#### Readiness Areas and Categories

Readiness Area	Readiness Category	CalSAWS (10/16/23)
	Deploy CalSAWS Releases 23.07	Complete
	Contact Center Readiness	On Schedule
Application	Imaging Readiness	On Schedule
	BenefitsCal Readiness	On Schedule
	Central Print Readiness	On Schedule
Integration	County Interface Partner Test (IPT)Execution	On Schedule
Integration	State Interface Partner Test (IPT) Execution	Complete
	Defect Resolution	Watch Item
Conversion &	EDBC Match – Auto Review Rates	Complete
CalWIN Migration	Mock Cutover	Complete
	Cutover Window	Watch Item
Technical	County Network Connectivity	Complete
rechnical	Performance Testing	Complete
Training	WBT Training Delivery (Target Completion)	On Schedule
Training	ILT Training Delivery	On Schedule
	Change Discussion Guides (CDGs)	Complete
	Communications	Complete
Organization	Business Process Reengineering	Complete
	Process Simulation	Complete
	Configuration	Complete
	Implementation Planning	On Schedule
	County Prep	On Schedule
Implementation	Pre and Post Implementation Support	On Schedule
	Help Desk	Complete
	County Ad Hoc Reports/APIs	Watch Item

#### Wave 6: 6B Cutover Weekend Calendar

#### Go-Live Event Cutover: System Down Time Calendar\*

	<b>Thursday</b> 10/26/23	Friday 10/27/23	Saturday 10/28/23	Sunday 10/29/23	<b>Monday</b> 10/30/23
Sacramento, San Luis Obispo, San Francisco Customers		l <mark>ot</mark> available beginning 10/26 at 5:1 I <u>sh</u> until Monday 10/30 by 6:00 AM			
Sacramento, San Luis Obispo, San Francisco Staff		Remains available from 10/26 5:00 Not available beginning 10/26 at 6:0 ot available beginning 10/26 at 6:0	5:00 PM	to register applications from	10/30 by 6:00 AM Production Available
CalSAWS Customers and CBOs		BenefitsCal is ave without MFA end	nly beginning 10/27 at 6 A ailable for customers and abled to submit applicatio 3:00 PM until Monday, 10/3	ns beginning Monday 10/3 until Monday	0 at 3:00 AM 10/30 by 6:00 ners and CBOs
CalSAWS Production		8:00 PM until Mo	nday 10/30 by 6:00 AM. C	R <mark>not</mark> available beginning Friday 10 ontact Center available (limited) b 00 AM. Imaging is view/read only.	
CalSAWS: LMS, PRT, Sandbox, Training		NO changes to system down	ntimes for CalSAWS PRT an	d LMS for CalSAWS County Staff	

\*as of 8/21/23

Riding the Wave



#### Wave 6C Cutover Weekend Calendar Wave 6C

	<b>Friday</b> 11/10/23	Saturday 11/11/23	<b>Sunday</b> 11/12/23	<b>Monday</b> 11/13/23
Read Only Counties	Calwin .	NO changes to system down	times for CalWIN Counties	
CalSAWS Customers and CBOs	🦔 🤍 MFA	efitsCal is available for customers an enabled to submit applications be 0/23 at 6 PM until Monday 11/13/23	ginning Friday	11/13 at 6AM Production Available
CalSAWS Production	Cal 38 WS 💙 at 6	AWS Production and IVR not availa PM until Monday 11/13 at 6:00 AM. ted) beginning Friday 11/10 at 6 PM	Contact Center available	NO N
CalSAWS: LMS, PRT, Training	NO change	s to system downtimes for CalSAWS	PRT and LMS for CalSAWS Cou	unty Staff

Riding the Wave



CalSAWS | JPA Board of Directors Meeting

#### 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	Low
269	CalWIN Counties may not have enough development and testing timeline to	
	Refactor their Ad-hoc Reports and Ancillary System before Go-Live	Medium
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 10/13/23

#### Release and Policy Update/Communications

- Continuous Coverage Unwinding Status
- Overview of SCR Prioritization Process



### CalSAWS Release and Policy Update Continuous Coverage Unwinding – DHCS Updates

- MEDIL I 23-47 Automation of 100% FPL, Zero Income, and Stable Income Waivers
- MEDIL I 23-49 Unwinding Renewal Packet and Reasonable Explanation Flexibilities
  - In most circumstances, if the county sends a renewal packet, the beneficiary must return it. This flexibility allows the county to verify any missing or pending information and process the renewal without waiting for the renewal form to be returned.
  - Counties have expanded flexibility in determining if information provided to the county meets the Reasonable Explanation criteria.
- Medi-Cal Member Targeted Surveys to determine why individuals did not respond to the renewal packet
  - Survey #1 is conducted by Covered California. This survey will be sent to individuals procedurally disenrolled from Medi-Cal and was launched in September in English/Spanish.
  - Survey #2 is conducted by DHCS in partnership with the California Health Care Foundation. This will involve sending surveys to procedurally disenrolled individuals starting in November and will include all threshold languages starting in December.

#### 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
  - Deployed to production on 9/28/2023
- Stable Income Waiver <u>MEDIL | 23-47</u>
  - Implemented CA-267730 on 10/10/2023. This data change was applied to December Non-MAGI renewals that met the stable income waiver criteria. The RE date was auto advanced 12 months for programs that met the criteria
    - Over 51,000 programs had their RE date auto advanced
  - The same process will be followed for the January renewals via CA-267897. This data change is scheduled to run on 11/9/2023

# CalSAWS Release and Policy Update Ages 26-49 Adult Expansion

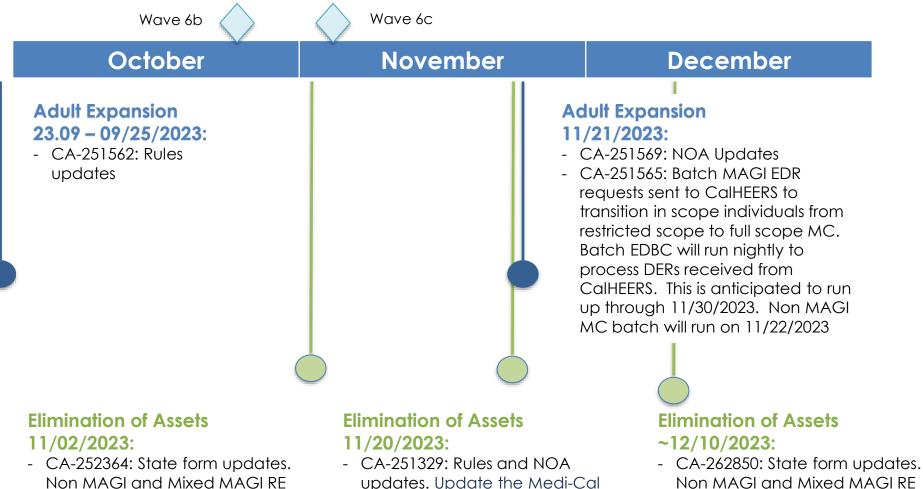
- Global Outreach Language Toolkit will be live October 17<sup>th</sup> in all threshold languages.
- The First Notice (General Information Notice) and FAQ will be mailed to existing restricted scope beneficiaries October 23<sup>rd</sup> through November 3<sup>rd</sup>.
  - The counties will provide these documents with new applicant materials October 1<sup>st</sup> through December 31<sup>st</sup>.
- CalSAWS will process batches to transition restricted scope beneficiaries into full scope for the January 2024 MOE
  - MAGI Send EDRs to CalHEERS on November 21<sup>st</sup>. CalSAWS Batch EDBC is anticipated to run through November 30<sup>th</sup> to process DERs as they are returned by CalHEERS.
  - Non-MAGI Run batch EDBC on November 22<sup>nd</sup>.
- DHCS will process transition batches for exceptions December 1<sup>st</sup> through December 5<sup>th</sup>.
- January 1, 2024 Adult Expansion fully implemented.

#### CalSAWS Release and Policy Update Elimination of Assets for Non-MAGI Medi-Cal Programs

- January 1, 2024 Asset Elimination fully implemented.
- Asset Elimination flyer will be sent in the October Johnson v. Rank (JVR) mailer to all Medi-Cal members.
  - This flyer informs individuals about the upcoming elimination of assets.
- Asset questions will be removed from Non-MAGI Renewal forms/packet with SCR CA-252364 effective 11/2/2023.
- Asset questions will be removed from BenefitsCal with November 2023 Priority Release 23.11.01.
- DHCS is finalizing all remaining ACWDLs connected to asset elimination including income producing assets by October 31.
- Asset Elimination Training on November 14 during the biweekly county support call.

# CalSAWS Release and Policy Update

CalSAWS Release Highlights – Adult Expansion and Elimination of Assets



Medicare Savings Programs

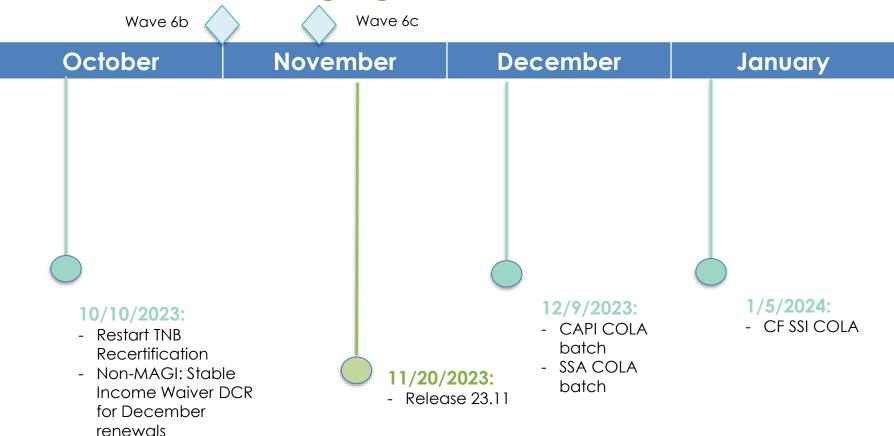
Non MAGI and Mixed MAGI RE<br/>packet updates. Update Formsupdates. Update the Medi-Cal<br/>EDBC Rules to no longer display<br/>or count property in the eligibility<br/>determination for Non-MAGI<br/>Medi-Cal, including LTC, and

# languages

packet updates – threshold

#### CalSAWS Release and Policy Update

CalSAWS Release Highlights



- 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.

# Prioritizing Older Policy SCRs

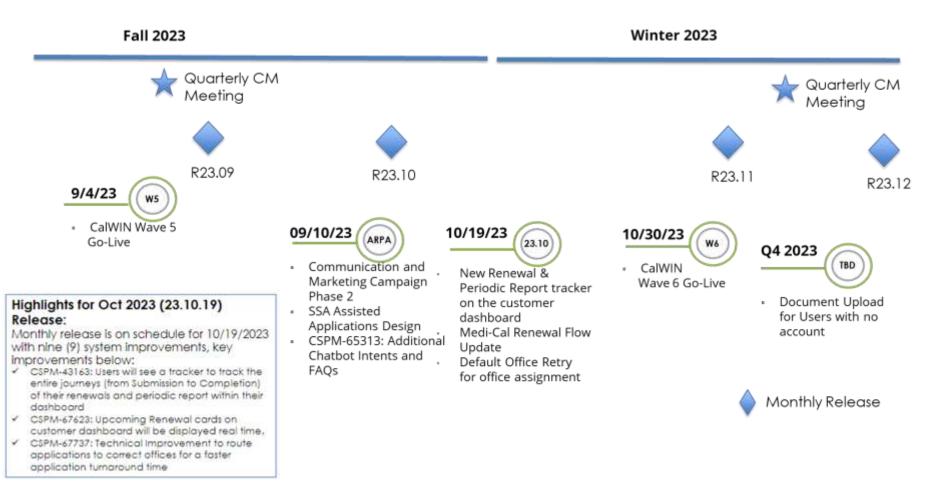
- Background: With migration ending, there was a request to identify our plan for implementing older policy SCRs.
- Team is currently reviewing and culling policy SCRs as some have been placeholders that didn't materialize, some are duplicates. Target completion is 10/31.
- Each policy area BA is identifying top policy SCRs
  - Consideration given to workaround complexity
  - ✦Reducing manual steps
  - +Correspondence
- The internal Design Manager's meeting will begin identifying targeted releases based on team capacity
  - Committees will continue to provide feedback on designs

#### BenefitsCal Update

- BenefitsCal Roadmap and Release Highlights
- ROI Update
- Collaboration Model (CM) Update
- Strategy for the top three reasons users request technical help



#### Roadmap and Release Highlights



BenefitsCal Roadmap and Release Highlights			Key         CM Enhancements         CM Research         Other Updates         Other Research         Bundled Update
September Release 23.09	<ul> <li>CSPM-65313: Additional Chatbot FAQs.</li> <li>CSPM-66711: Display work and cell phone numbers on the summary page.</li> <li>2 Technical Updates: Including additional</li> </ul>	October Release 23.10	<ul> <li>CSPM-43163: Implement a Renewal &amp; Periodic Report tracker on the customer dashboard to prevent duplicate periodic and annual reports.</li> </ul>
September Research Activities	<ul> <li>filters to Qlik reporting .</li> <li>CSPM-67105: Assistance with identification of the type of document being uploaded.</li> <li>CSPM-67149: Application Status Tracker.</li> <li>CSPM-67189: Display Primary Applicant Status on a case.</li> <li>CSPM-TBD: Conduct user acceptance testing on the selection of periodic report and renewal options in the document upload flow.</li> </ul>	October Research Activities	<ul> <li>CSPM-67041: Medi-Cal Renewal Flow Update to remove assets per policy.</li> <li>2 Technical Updates: Including displaying renewal cards on customer dashboard real- time and default office retry for office assignment</li> <li>CSPM-67103: Update location of where YouTube Videos are located.</li> <li>CSPM-67150: Identify user journeys and research Authorized representative user type in BenefitsCal.</li> </ul>
		November Release 23.11	CSPM-67119: Allow anonymous users to upload documents.
		November Research	<ul> <li>CSPM-67104: Research E-mail Notifications to be sent from BenefitsCal.</li> </ul>
		Activities	CSPM-67189: Research Display of Primary Applicant Status on a case

#### BenefitsCal Roadmap and Release Highlights

Upcoming

Policy Items

- ABAWD
- Apply For Benefits CAPI
- CFAP Expansion
- Benefits Replacement (EBT2259 form)

#### **Planning In-Progress**

- Implement new pre-populated SAR7
- Apply For Benefits Homeless Assistance
- CalWORKs 2.0
- GROW/WTW

#### **GCF** Parity

- SSA Assisted Applications
- Benefits Replacement (CF303) form
- Other enhancements

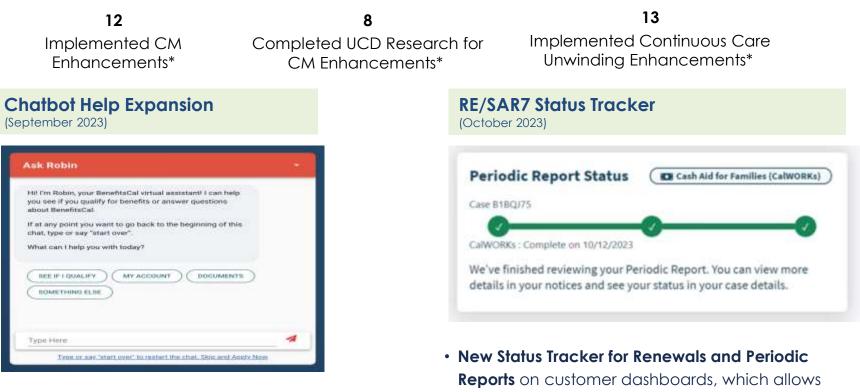
Key	
CM Enhancements	📃 CM Research 🗹 Completed
Other Updates	Other Research 🔓 Bundled Update

### BenefitsCal ROI Update

- ROI Workgroup met on Sept. 11, Sept. 18, and Oct.
   2, 2023.
- Group discussed policy questions and clarifications, draft applicant/recipient roles/responsibilities (e.g., Authorized Representatives, Power of Attorney, CBOs, etc.)
- Next meeting dates scheduled
  - 10/23
  - 11/13
  - Future dates TBD

#### **Collaboration** Model Update

In Calendar Year 2023, we conducted 4 Collaboration Model Meetings. Last meeting held on September 22<sup>nd</sup> and next meeting is on December 1<sup>st</sup>, 2023



 Allows customers to get extended assistance and get clarifications in the Chatbot tool, including questions related to account and document upload help.

\* In calendar year 2023

New Status Tracker for Renewals and Periodic Reports on customer dashboards, which allows customers to see the status of their report and have transparency when their renewals and SAR7 is being processed.

# Strategy for the top three experiences highlighted by customers

uploaded documents       guides       reduced by 50% since July 2023         • Users were not notified when a       • Enhancements to restrict       • <1% tickets resulted in a system	(	1 OBSERVATION	2 SOLUTION	3 IMPACT
<ul> <li>FAQs, FAC1 sheet and Iraining uploaded documents</li> <li>Users were not notified when a document failed to upload document failed to upload document failed to upload document failed to upload document for upload documents to restrict</li> <li>User selecting incorrect</li> <li>FAQs, FAC1 sheet and Iraining guides</li> <li>Enhancements to restrict</li> <li>Added new user-friendly</li> <li>SCR scheduled to allow anonymous uploads</li> </ul>		based on helpdesk tickets, CX	and address system observations	continued CX research & insight driven future prioritizations for
		uploaded documents • Users were not notified when a document failed to upload due to file limitations • User selecting incorrect	guides • Enhancements to restrict encrypted, pw protected files • Added new user-friendly	<ul> <li>&lt;1% tickets resulted in a system defect since Aug 2023</li> <li>SCR scheduled to allow</li> </ul>

 Continuous UCD research to enhance usability and CX based on the feedback from customers for Document Upload

Doc Up

# Strategy for the top three experiences highlighted by customers

	OBSERVATION	2 SOLUTION	BIMPACT
	Identify system improvements based on helpdesk tickets, CX and CM priorities	Deliver system enhancements and address system observations to improve customer experience	Perform ongoing monitoring, continued CX research & insight driven future prioritizations for continuous improvement
Account Management	<ul> <li>Customer challenges in verification code usage during account creation, and password reset</li> <li>User challenges while setting up security responses</li> </ul>	<ul> <li>Added tooltip to email/phone OTP for password reset, account creation flow</li> <li>Enhanced system behavior to allow spaces in the security responses</li> </ul>	<ul> <li>Password reset call volumes dropped to 1.5% from ~3.5% in Sep 2023</li> <li>No issues were reported for the security responses set up since the enhancement</li> <li>SCR to allow Progressive Account Creation</li> </ul>

 Continue UCD research to enhance usability and CX based on the feedback from customers on Account Management

# Strategy for the top three experiences highlighted by customers

(	OBSERVATION	2	SOLUTION	3	IMPACT
	Identify system improvements based on helpdesk tickets, CX and CM priorities		Deliver system enhancements and address system observation: to improve customer experience		Perform ongoing monitoring, continued CX research & insight driven future prioritizations for continuous improvement
Case-Link	<ul> <li>In rare instances, incorrect case-links were established by customers</li> <li>Few customers unable to view case information after a successful case link</li> </ul>		<ul> <li>Enhanced to allow 9-digit SSN instead of the last 4</li> <li>FAQs, Job-Aids, Training guides published for helpdesk and county staff</li> </ul>		• No issues were identified on BenefitsCal for the reported case- link incidents

 Continued research with Counties, Customers and CBOs on the customer messages to enhance usability on Case Linking

Dept. of Child Support Services request for additional data access



New Child Support Statewide user type in CalSAWS

- SCR CA-264033 created for a new user type for Child Support staff: Child Support Statewide
- The Child Support Statewide users will be assigned a new "Child Support View only" role. The CalSAWS Project will maintain the Child Support View only role.
- A CIT will be sent out to inform the counties of the new role.
- Training sessions will be held for county security personnel on how to add the new user type and how to transition existing Child Support (LCSA) users. Training is currently targeted for early December (actual dates will be provided in the upcoming CIT).
- Counties will continue creating their Local Child Support staff users (LCSA) in CalSAWS as they do today.
- Consortium will continue to support the CSSD state staff users.
- The new Child Support Statewide user type is targeted for release by the end of 2023.

#### Return Mail

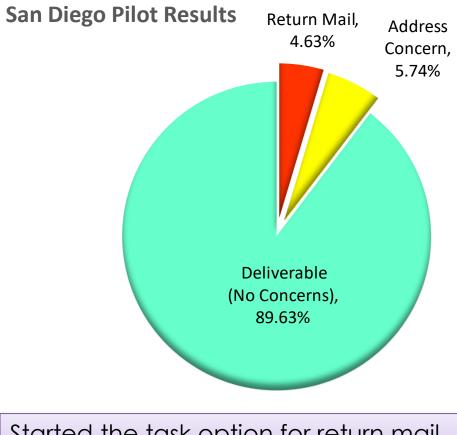


### Central Print Return Mail Pilot Results Update

San Diego has piloted the Return Mail services since July 5, 2023

#### 69 Days of Central Print Mailings

- ✓ 1,124,136 envelopes mailed
- ✓ 52,012 envelopes undeliverable based on the USPS electronic results
- ✓ 64,528 envelopes have address problems some may cause them to become undeliverable in the future



Started the task option for return mail on August 30, 2023

# 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
- Journal Entry (Case Comment) added
  - OPTION Task 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, 4.63%

# 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 created within CalSAWS for mail with address concerns



• OPTION – Journal Entry (Case Comment) added

Address Concern, 5.74%

# Central Print Return Mail As of 10/8/2023 Meeting/County Purchase Document Requests



#### Meeting Request

• Butte

- Humboldt
- Kings
- Lake
- Los Angeles
- Orange
- Riverside
- Sacramento
- San Francisco
- Santa Clara
- Solano
- Tulare

#### Estimate Request

- Contra Costa
- Marin
- Monterey
- Napa
- San Benito
- Sonoma

### Contact Center Update



## eCCP Migration Plan – Former C-IV Counties Upcoming Activities – Enhanced Call Control Panel (eCCP)

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	Complete
	Stanislaus	9/28/2023	Complete
Phase 3	Kern	9/28/2023	Complete
FIUSE 3	Riverside	10/10/2023	Complete
	Kings	10/20/2023	In Progress
Phase 4	Yuba Monterey Humboldt San Bernardino (move to new account)	12/15/2023	In Progress*

\*Contact Center team to work with each county to finalize individual go live dates, as needed

### 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

January 2024 CalSAWS Conference and JPA Member Representatives and Board Meetings



#### January 2024 Theme Cultivating CalSAWS Community



Cultivating CalSAWS Community

- ✓ We built CalSAWS together historical review and celebration
- ✓ Building a stronger and better CalSAWS community for all our neighbors
- ✓ Focusing on the counties
- ✓ Highlighting counties helping counties (like they did throughout pandemic and migration)



# 2024 CalSAWS Conference & JPA Meeting January 25-26, 2024 | The Westin San Diego Bayview

- Free registration is open now!
  - Registration and hotel links are included in the conference brochure.
- Sessions will include:
  - BenefitsCal
  - IDEA/DEI
  - Reports
  - Introduction to AI
  - LEAP Initiative & Future of Training
  - AWS Connect & Optimizing your Contact Center
  - Bridging the Gap (Statistics & Automation)
- Dinner Thursday, January 25th will include a celebration of the successful migration to CalSAWS and a look at SAWS history.
- In-person only
- JPA Meeting requires quorum of the 58-County Directors.

### 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	297/297	25
BenefitsCal 23.09.*	7	3	Ad hoc	2
CalSAWS 23.11	11	6	62/226	In Progress
Total	23	18	359	27

QA Technical Reviews			
<b>29</b> SLAs (CalSAWS, Imaging, OCAT, BenefitsCal)	<b>10</b> M&O Annual Plan and SSP Updates	<b>5</b> Root Cause Analyses (RCA)	<b>21</b> Technical Updates (SCRs and Defects)

QA Migration Reviews101093426Retrospectives<br/>Per WaveImplementation<br/>Support StaffMigration<br/>RequirementsUpdates<br/>(SCR and Defects)

#### Functional/Test Highlights

Completed 23.09 BenefitsCal and CalSAWS Independent Tests Started 23.11 CalSAWS Independent Test CFAP/FCED/WDTIP/ROI Designs

#### **Technical Highlights**

Confirmed monthly services levels

Reviewed RCAs and recommendations for performance, network, and imaging.

Continued testing for technical updates

#### **Migration Highlights**

Facilitate Retrospectives and Best Practice sharing across Waves

Assist with onsite and virtual support

Confirm requirements status across CalSAWS, BenefitsCal, Central Print and Implementation Support

### Update on Key State IV&V Activities



# Independent Validation & Verification (IV&V) Key Activities

	CalSAWS and BenefitsCal Releases	<ul> <li>CalSAWS Release 23.11 Testing</li> <li>BenefitsCal Monthly Release Development and Testing, UCD, ROI Workgroup Meeting</li> </ul>
~~~	Performance	<ul> <li>Imaging: Production defect resolution and enhancements</li> <li>Batch: Ongoing Performance improvements</li> </ul>
	CalWIN Data Conversion	<ul> <li>Wave 6 Conversion Prep</li> <li>Triage and Resolution of open Conversion Defects</li> <li>Mitigation actions and improvements for the upcoming conversion cutovers</li> </ul>
¥     ¥ ¥     ▼ ↓	CalWIN Implementation	• Wave 5 Post Implementation

### Adjourn Meeting

